

2009-2010 Action Plan Business and Financial Services

The following Business and Financial Services Action Plan defines the major goals of the department that directly support the ASLS Division Focused Initiatives. Within BFS, Student Business Services, Procurement & Materials Management, and Accounting Services have established a number of additional department specific goals.

The following goals apply to all areas in Business and Financial Services and serve as the basis for goals and plans of the individual areas:

- 1. Enhance Service and Efficiency Through Technology**
- 2. Improve Communication and Knowledge Sharing**
- 3. Ensure Security and Integrity of Financial Activities Through Continuous Improvement of Internal Controls, Training and Monitoring**
- 4. Implement an Organizational Structure that Maximizes the Use of Our Resources and Streamlines Work Processes**
- 5. Provide Support for the University's e-Scholar Laptop Initiative**
- 6. Implement a Training and Development plan**

ACCOUNTING SERVICES

- Identify and implement a new reporting system to increase Business Intelligence among the campus departments
- Continue to expand US Bank Access Online services for the Procurement Card program to include online approval of transactions and automatic reallocations
- Implement ideas from TER lean initiative project, including the implementation of the travel expense module and ACH payment of reimbursements
- Improve the post award grant functions to include a web page for information, use of ImageNow for paperwork and implementation Project Lite in the Shared Financial System
- Work with Human Resources and UW System Administration to implement the new PeopleSoft Human Resource System.
- Recruit and hire for open staff positions in Accounts Payable and Grants

PURCHASING & MATERIALS MANAGEMENT

- Expand the use of our on-line surplus property storefront – TouchNet Marketplace
- Hire and integrate a new Assistant Director of Purchasing and Material Management
- Go through a Lean Process for Surplus Property and implement ideas
- Fully implement new package Tracking Assistant in Central Receiving
- Utilize package Tracking Assistant for University Stores deliveries
- Recruit and hire for open Purchasing Associate
- Complete Lean Process for University Stores
- Build RFP online scoring template
- Make modifications to the Convenience Copier program to utilize online forms.
- Eliminate all rented copiers from Convenience Copier to reduce spend.
- Investigate SFS Contract Management tool.
- Eliminate need for theft insurance on E-Scholar program (possible ~\$200k savings).

STUDENT BUSINESS SERVICES

- Use the new Student Administration system from Oracle/PeopleSoft to find efficiencies in procedures in Bursar's office
- Add Touchnet's billing module to improve service to students
- Recruit and hire for open Financial Specialist position
- Install security cameras in Bursar Office
- Update Kiosk to something more usable. Include building information, touchscreen and other information that would be useful to visitors.

DIRECTOR of BUSINESS & FINANCIAL SERVICES

- Ensure that all employees are cross-trained to have a basic knowledge of each job area
- Coordinate BFS staff activities to enhance morale and foster good communication
- Update and monitor the University's internal control document, Red Flag document and PCI compliance
- Evaluate staffing needs to maximize resources as staff turnover occurs or opportunities to convert to permanent positions arise.
- Provide training and development opportunities to employees that contribute to excellence in performance, quality in department services, and positive and safe work environment for all BFS staff