The EMU Marching Band has a long tradition of musical and entertainment excellence. Comprised of nearly 200 students, the EMU Marching Band represents nearly every major on campus. The band has a rich 119-year history of serving EMU at athletic functions, parades, and events.
The Division of Business and Finance undertook the task of developing strategic objectives to support University Goals for Academic Year 2008-2009. The following business units participated in the process; Budget Office, Financial Services, Purchasing, Telecommunications, Mail Services, Student Business Services, and Auxiliary Services. The primary objectives in support of university goals are listed below; each business unit identified specific stages and tasks as a means to achieving these objectives.

- To be recognized for strong undergraduate and graduate academic programs &
- To maximize student success &
- Maximize faculty and staff success &
- To create a sustainable, safe, and student-focused learning and work environment
  - Improve business process and document procedures facilitating the reallocation of time and resources in support of faculty and students
  - Improve customer service satisfaction internal and external
  - Increase employee engagement - satisfaction and morale
- To ensure financial stability
  - Establish divisional goals
  - Improve communication and planning
  - Allocate resources wisely
- To be recognized for service and public engagement

To monitor progress these goals, objectives and associated tasks will be reviewed at the four to six month mark and then again at the end of the academic year.
### Strengths

- A diverse, stable, and experienced staff with a broad knowledge base that works well as a team
- Continuation of a transparent budget process for 2010-2011
- B&F staff have technical expertise, are innovative, and effectively utilize problem-solving skills
- Staff has a positive attitude, are dedicated to EMU, and take pride in the institution
- Take advantage of every opportunity to reduce costs
- Setting and achieving goals
- Staff communicates effectively and encourages cross-divisional cooperation
- Stabilization of leadership
- Staff produces high quality work and meets deadlines
- Staff professional development
- B&F effective change agent
- B&F maintains strong system checks and balances
- B&F is important to the University and is continuously involved in business processes
- Recruitment and retention of high quality staff

### Opportunities

- Michigan has a strong research environment, abundant natural resources, investment in clean energy sources, tax incentives, and a high percentage of degree holders in the population.
- Rising high school graduation, transfer rates and "niche" or non-traditional students across the US
- Targeting of high school graduation ceremonies
- Higher education is increasing in demand as Michigan moves from industrial to knowledge-based
- Campus resources and improved utilization of these resources, such as training with HR or IT
- New employees with new ideas
- President's strong ties to Lansing
- Planning and research opportunities
- Innovation: provide innovative ideas to enhance processes by end users
- Professional Development opportunities: campus availability of new methods, delivery, and individual learning plans
- Utilization of new buildings on campus to showcase EMU
- Reputation & Relationships: Further advancement of division's reputation and relationships across campus
- Community relations (Newer programs, better relations)
- Change: Liaison over many different groups on campus and potential to be a leader in exchange of ideas campus wide.
- Workshops: Communication of necessary policy changes, procedures, and processes and how they can improve employee work.

### Weaknesses

- No divisional staff meeting to communicate across departments in the division
- Not utilizing longevity of staff - institutional history
- Customer Service and Flexibility: External perception of B&F as somewhat inflexible and needing to improve customer service skills, although this is improving
- Turnover, morale, and pockets of negativity remain, but morale is improving and turnover is now more necessary and expected than it was.
- Budgetary limitations and lack of equity salary adjustments
- Professional development is limited
- Not taking full advantage of technology potential
- Still in process of improving effective communication and current policies, procedures, and business processes
- Individual goals not team goals
- Little to no communication across silo's, although this is improving
- Lack of EMU vision

### Threats

- State economic challenges result in decrease in state appropriation
- Accessibility and affordability by students as tuition cost climb
- Escalating cost of utilities, healthcare and pensions
- Negative publicity - media
- Out migration of college-trained talent - discouraging new or existing companies to choose Michigan
- Expected decline in future Michigan high school graduation rates
- Change without establishing support and involving staff
- Lack of urgency and accountability university wide
- Lack of collaboration on campus on B&F processes. Groups on campus are not taking advantage of technology
- General resistance to change and implementation of changes outside the B&F division
- Tax implications
- University policy changes and their implications
- Culture of fear and risk taking not encouraged
- University wide coordination of goals
- Influence of the 2 year community college
VICE PRESIDENT
FOR BUSINESS AND FINANCE

SIX MONTH ACCOMPLISHMENTS

- Improve business process and document procedures facilitating the reallocation of time and resources in support of faculty and students
  - Work to fine tune financial data models to achieve better forecasting results
- Improve customer service satisfaction internal and external
  - Implement new section 245 guidelines.
- Increase employee engagement - satisfaction and morale
- Improve communication and planning
  - Developed new Dashboard Metrics to communicate financial data to the BOR/Executive team.
- Allocate resources wisely
  - Negotiate an agreement with a new internal audit company to generate increased service at a reasonable cost
  - Communicated/Negotiated with JP Morgan Chase which allowed Eastern Michigan to not have to post collateral

TWELVE MONTH ACCOMPLISHMENTS

- Improve business process and document procedures facilitating the reallocation of time and resources in support of faculty and students
  - Create a multi-year budget to actual variance report used regularly to evaluate financial performance for each Auxiliary unit
  - Work with General Counsel and BOR Secretary on policy and procedures campus wide
  - Develop and execute a plan to turn open prior years internal audit corrective actions into completed recommendations.
- Improve customer service satisfaction internal and external
  - Customer Service survey
  - Communicate with Moody’s rating agency to maintain current rating
  - Generate discussions with HLC in regards to financial performance the last two years along with budget forecasts for the next 3-5 years.
- Increase employee engagement - satisfaction and morale
  - Help establish the makeup of the BOR new Audit Committee
- Improve communication and planning
  - Coordinate with Financial Aid, Enrollment, and Provost’s office to develop a robust model that indicates multi-year Financial Aid commitment levels prior to the Board of Regents Financial Aid recommendation
- Allocate resources wisely
  - Work closely with Scion on the best housing strategy for Eastern’s future
  - Negotiate new contracts with investment advisor, external auditors, and merchant card services to general increase service at a reasonable cost
  - Work with the Physical Plant and our Natural Gas Supplier to negotiate a better price with less risk.
BUDGET OFFICE

SIX MONTH ACCOMPLISHMENTS

- Improve business process and document procedures facilitating the reallocation of time and resources in support of faculty and students.
  - Implement Extender for scanning and indexing Journal vouchers and position control forms to streamline and increase processes’ efficiency as well as reduce printing costs.
  - Auxiliary operations moved to position control, with approved funding pools and general fund support. Combined net results serve as funding source for capital planning. Monthly budget to actual reports are circulated and reviewed.
  - Work with Autism Center to develop and complete tool that shows long-term financial viability of the center, as well as the budget for FY15.
  - Maintain auxiliary fund position control and balanced funds every day.
  - Monitor division and department spending monthly to ensure they stay within budgeted level for controllable costs; send notices for any areas committing more than budgeted resources. Send report to division heads, area of concentration heads, and financial managers for departments. Report annually to CFO and division heads for controllable spending by department within the division.
  - Develop University-wide tool to analyze long-term accounting and cash flow impact on critical ratios, using a set of critical factors that can be manipulated.
- Improve communication and planning
  - Update web material for helpful budget related practices and policies.

TWELVE MONTH ACCOMPLISHMENTS

- Improve business process and document procedures facilitating the reallocation of time and resources in support of faculty and students.
  - Move the University toward adequate contingency levels through the budget process.
    - Operating – increase $250K to $500K annually until achieve a level of 1% of general fund revenues.
    - Capital- increase $200K to $300K annually until reach 6% of overall capital spending.
  - Evaluate an appropriate level of general fee / fund support for auxiliary operations once a year. Meet twice a year with auxiliary operation representatives to encourage goal setting toward self-supporting operations. Chart the level of general fee/ fund support by year for each operation.
  - Use Budget Development model to enable budget entries to be made across campus.
- Increase employee engagement - satisfaction and morale
  - Assist seven MPSERS schools to approach State legislative to enact equitable law amendments to relieve burdensome pension costs.
  - Provide opportunities for cross-training staff.
- Involve all staff in planning and executing budget generation / rollover to FY 15.
- Use the division’s tool for employee satisfaction to track progress over a rolling 4 year period; identify continuous improvement ideas from the tool.

**Improve communication and planning**

- Develop general fund budgets collaboratively (utilities, benefits, SCH, transfers {auxiliary overhead, debt, designated fund personnel, asset preservation, parking and ticketing, general fee} insurance, athletics, investments, bad debt, faculty wages, cuts and new spending priorities, discretionary financial aid, staff wages, miscellaneous revenues).
- Measure progress with tools for certain areas at least quarterly through the year (underlined above).
- Establish regular meetings with Human Resources to strengthen relationships and provide seamless customer service.
CONTROLLER’S OFFICE

SIX MONTH ACCOMPLISHMENTS

- Improve business process and document procedures facilitating the reallocation of time and resources in support of faculty and students
  - Roll out Concur Travel and Expense software campus wide (in progress)
  - Eliminate PaymentNet software campus wide
  - Assist University in Faculty Load and Compensation Module
  - Improved procedure documentation
  - Implemented GASB 63, and 65
  - Assisted with change to GASB 53
- Improve customer service satisfaction internal and external
- Increase employee engagement - satisfaction and morale
- Improve communication and planning
  - Reconciled flexible spending accounts with HR
- Allocate resources wisely

TWELVE MONTH ACCOMPLISHMENTS

- Improve business process and document procedures facilitating the reallocation of time and resources in support of faculty and students
  - Complete and update all Grant Accounting Procedures
  - Concur Travel and Expense Implementation Training
  - Continue on Imaging project (when IT resources become available)
  - Assist University in Faculty Load and Compensation Module
  - Explore eliminating Payroll Checks and move to Pay Cards
  - Explore Implementing Virtual Card for payments
- Improve customer service satisfaction internal and external
  - Utilize workflow to request/approve/route for input new funds and orgs
  - Explore Fixed Asset and JV approvals in Banner per consultant recommendation
- Increase employee engagement - satisfaction and morale
- Improve communication and planning
- Allocate resources wisely
  - Working with IT to develop MPSERS report to submit timely reconciliations
  - Tracking under recognized IDC revenue
STUDENT BUSINESS SERVICES

SIX MONTH ACCOMPLISHMENTS

- Improve business process and document procedures facilitating the reallocation of time and resources in support of faculty and students
  - Develop a business model by using Parking for the next phase of the cashering system
- Improve customer service satisfaction internal and external
  - Continue to develop the Third Party Bill, include cashiers
- Increase employee engagement - satisfaction and morale
- Improve communication and planning
  - Meet with Accounting more frequently to refine and develop processes
- Allocate resources wisely

TWELVE MONTH ACCOMPLISHMENTS

- Improve business process and document procedures facilitating the reallocation of time and resources in support of faculty and students
  - Decentralize cash pick up and transport scheduling - New vendor for pickup, GARDA, was selected and will begin on Monday August 4th, decentralization of process put on hold.
  - Review and evaluate tuition and residency appeal process- New tuition appeal process, working with Provosts office, set to begin August 1.
  - Review Banner AR implementation –Phase 1 Analysis this will be carried over to FY 2015.
  - Reconcile third party clearing account- Completed; Accounting worked with Third party to clean up the clearing account.
- Improve customer service satisfaction internal and external
  - Work with CMD, Financial Aid, Records and Registration, and Admissions to develop online tutorials for students- this will be carried over to FY 2015.
  - Improve Web Pages- Completed work with Integrated Content team for new Student Financial Services web page, tentative roll-out date is early August.
  - Develop comprehensive schedule- Worked with GLOW (FA, SBS, R&R, and Admissions) to bring together comprehensive dates for Winter semester as start of master calendar.
- Increase employee engagement - satisfaction and morale
  - Review all job specs- Began process with review and update to the Payment and Student Account Specialists job specs.
- Improve communication and planning
  - Increase team meeting attendance-include all PT’s- Bi-weekly meetings have been well attended, productive, and will continue going forward.
- Allocate resources wisely
  - Issue an RFP for collection services will carry over to FY 2015 goals.
PURCHASING

SIX MONTH ACCOMPLISHMENTS

- Improve business process and document procedures facilitating the reallocation of time and resources in support of faculty and students
  - Physical Plant Contract Updates (ONGOING – COMPLETION BY JUNE 2014)
  - Physical Plant Vendor Procedures (Vendor Handbook) -COMPLETED
  - Physical Plant FF&E Process -Review and Recommendations (January 2014)
- Improve customer service satisfaction internal and external
  - Create Purchasing Alerts (COMPLETED – TESTING ONLY)
    - Next Approver
    - Received in Purchasing Queue
    - PO Approved – to Requester

Increase employee engagement - satisfaction and morale

- Establish divisional goals
  - Establish a 2013-14 Capital Project Matrix- Support Documentation and Business Case Development
    - Public Safety- Camera, AED and Signage Capital Plan
    - Distributed Antenna System (DAS)
- Improve communication and planning
- Allocate resources wisely
  - Multi Carrier(Internal) Distributed Antenna System (AT&T)
    - Business Case and Budget Estimate for FY13-14 Capital Plan (COMPLETED JANUARY 2014)
  - Xerox Print Management Services Project
    - Completion of Business Finance- MFD Rollout
  - Ticketing System Master Plan (Implementation/Commissioning)- COMPLETED
  - Public Safety Business Case Development (Governance Model and Preliminary 3 Year Capital Plan
    - Phase 2 – Operational/Governance Plan and Proposed Capital Funding (3 year Plan)
  - Capital Projects
    - Classroom A/V Project – Phase 1 (with Anthony James Partners, Plant, and Academic Affair/IT) COMPLETED
TWELVE MONTH ACCOMPLISHMENTS

- Improve business process and document procedures facilitating the reallocation of time and resources in support of faculty and students
  - Complete evaluation of an E Procurement Portal/ Online Marketplace
    - EMS Solutions
    - ePS
  - Implementation of Purchasing Terms and Conditions – Product and Services
  - Implementation of Contract Review Process – Legal and Procurement
  - Updating of Strategic Suppliers on Purchasing Website
  - Creation of Employee Benefits (from Supplier’s) Website
- Improve customer service satisfaction internal and external
  - Purchasing Alerts (GO LIVE – FEBRUARY 2014)
- Increase employee engagement - satisfaction and morale
- Establish divisional goals
  - E- Services – Service Assessment and Staffing Transformation Project (Phase 1)
  - Create Spend Repository with BF Business Systems Support (K. Atkins, Purchasing)
- Improve communication and planning
  - Xerox Print Management Services Project
    - Completion of University Inventory – March/April 2014
  - Establish a Strategic Sourcing Roadmap (Wave 1) w/Key University Departments (IT, SBS, Physical Plant, HR) for FY 13/14
    - Establish Projected Savings Goals in Specific Commodity Types (Furniture, IT Servers/Computers, Print Management Services, Computer Peripherals, MRO Products, Toners)
  - Complete Implementation Plan - Public Safety’s Capital Improvements (FY13/14)
  - Complete the Re-engineering of Athletics Department’s Procurement and Capital Project Planning
- Allocate resources wisely
  - Development of an Athletics Project Plan (Three Year Plan)
SHIPPING & RECEIVING, MAIL SERVICES, AND FLEET MANAGEMENT

SIX MONTH ACCOMPLISHMENTS

- Improve business process and document procedures facilitating the reallocation of time and resources in support of faculty and students
  - Development and Tracking of Key Metrics within SRM Services
  - Vehicle Management Program
    - Implement Wright Express Fuel Card Program (Completed - November 2012) to provide:
      - Complete tracking on fuel and maintenance costs on owned vehicles
      - Provide reporting by vehicle, operator, and transaction types
      - Oversight and audit of all fuel and vehicle maintenance activity
  - Vehicle Management Program
    - Meet with vehicle requesting departments to complete the EMU Vehicle Justification form to ensure vehicles:
      - Meet the university standards required for purchase or lease (i.e.: 1000 miles per month or 4 days a week usage minimum)
      - Appropriately selected and outfitted
      - Adequately utilized (frequency of use/miles/purpose)
      - Meet with vehicle holding departments to assess their current needs and their departmental inventory of both leased and owned vehicles
      - Eliminate underutilized and redundant vehicles
    - For all vehicles procured we have utilized the EMU Vehicle Justification Questionnaire and face to face meetings first to make certain that the departments meet the minimum utilization standards in order to possess a vehicle. And secondly to ensure we are procuring the optimum vehicle for the need.
      - As a result of holding departmental vehicle needs assessment meetings we have reduced the number of on campus vehicles from 129 to 123 a 5% reduction in the number of vehicles.

- Improve customer service satisfaction internal and external
- Increase employee engagement - satisfaction and morale
- Establish divisional goals
- Allocate resources wisely
- Improve communication and planning
TWELVE MONTH ACCOMPLISHMENTS

- Improve business process and document procedures facilitating the reallocation of time and resources in support of faculty and students
- Improve customer service satisfaction internal and external
  - Creation of a university vehicle pool or university “share” pool that makes vehicles available to non-vehicle owning departments and organizations
- Increase employee engagement - satisfaction and morale
- Establish divisional goals
- Improve communication and planning
- Allocate resources wisely
  - Vehicle owning departments (except Physical Plant) must meet utilization standards (time/ miles/purpose) in order to have or exclusively possess a vehicle in that department.
    - Correct the occurrence of marginally and underutilized vehicles
    - Eliminate single use department vehicles
      - Make university assets available to a larger pool of department’s organizations and entities.
      - Develop a funding program or model for the purchase and or lease of university vehicles
- Funding Model
  - Self-funding Model – MSU
  - Centrally-funded Model- GVSU
    - A self-funding vehicle program is where we are headed. In a self-funding program the University Vehicle Department owns the vehicles and leases them to the academic, auxiliary or service providing departments. The monthly departmental charges are retained by the University Vehicle Department and used to pay off and purchase new vehicles. Vehicles are managed through their life cycles and will be bought and sold with the express intention of maximizing value ($) for the university.
  - Acquisition Process
    - The use of state and municipal purchasing agreements to obtain best pricing
      - MiDeal
      - Municipal County Consortium Agreements- Macomb/Oakland
    - Manufacturer’s Governmental Discounting Programs
    - When possible purchase or lease from local Ypsilanti dealerships
vehicle Retirement Process

- Create guidelines to optimally dispose of used or state vehicles
  - Reduce of 10% of State Leased Vehicles (2013)
  - Strategy for Discontinuation of State Leasing Program (March 2013)
- Retirement criteria based on the vehicle, age, miles, condition and the market, 3yr, 5yr, 7yr
- Sell used vehicles on proven web based applications
BUSINESS SYSTEMS SUPPORT

SIX MONTH ACCOMPLISHMENTS

- Improve business process and document procedures facilitating the reallocation of time and resources in support of faculty and students
  - University Budget
    - Payroll Encumbrance Set Up and Processing
  - Review POS Life Cycle
    - Physical Inventory
    - Life Cycle Planning and Estimates
  - Assist with Membership Management RFP Process
  - Assist with StarRez Housing System Implementation
  - Re-establish Persona Off-line Door Locks
  - Review, Document and Implement Meal Plan and Door Access Loads
  - Student AR 1st Party Invoices
  - Student AR 3rd Party Invoices
  - ePAF, Payroll, Health Care Census and FLAC Exceptions
  - Division Web Presence
  - New University Styles
  - Web Content Manager

- Improve customer service satisfaction internal and external
- Increase employee engagement - satisfaction and morale
  - Windows 7 Certification
- Improve communication and planning
- Allocate resources wisely
TWELVE MONTH ACCOMPLISHMENTS

- Improve business process and document procedures facilitating the reallocation of time and resources in support of faculty and students
  - Review Collection System Needs
  - Review 3rd Party System Needs
  - Review Student Installment Plan
  - Student AR Unapply Automatic Mode (i.e. without POPSELS)
  - Dining Sales Interface with the General Ledger
  - Point of Sale Life Cycle Planning and Estimates
  - Assist with Membership Management RFP Process
  - Assist with StarRez Housing System Implementation
  - Implement Door Service Router Software for Residence Hall Door Locks
  - Division and Campus Reporting
    - Student AR 1st Party Invoices
    - Student AR 3rd Party Invoices
  - Division Web Presence
    - New University Styles
    - Web Content Manager
  - Desktop Support
    - Refresh Division Scan Station Hardware
    - Install POSReady2009 in All Point of Sale Locations (Windows XP)
    - Review and Update All Desktop Work Procedures

- Improve customer service satisfaction internal and external
- Increase employee engagement - satisfaction and morale
  - Project Management Professional Certification
- Improve communication and planning
- Allocate resources wisely