Online Assessment Tracking Database

Sam Houston State University (SHSU)
2014 - 2015

Office Of Treasury And Investment Management

Goal   **Advance Student Success** 🔑

Develop resources and opportunities to support the intellectual transformation of students which will enable them to succeed once they have graduated from our University.

Objective (P)   **Expand Opportunities For Student Employment** 🔑

Treasury will seek to establish student employment opportunities that will allow students to obtain practical work experience that is related to their field of education.

KPI Performance Indicator   **Student Employment Within Treasury** 🔑

- Identify practical opportunities that will increasing student employment and be funded as part of the budget process.
- Show an increase in student employment by adding at least 1 student worker to the department.

Result   **Student Worker** 🔑

Treasury currently has one student worker and is looking to add an additional student before the end of the fiscal year.

There are no actions for this objective.

Objective (P)   **Improve Participation Of Vendors** 🔑

Work with vendors to improve their participation in career services events such as career fairs.

KPI Performance Indicator   **Add Vendors To Career Service Events** 🔑

- Work with Treasury's vendors to boost opportunities especially in finance/banking and retail/marketing.
- Track participation of Treasury's vendors in such events on an annual basis.

Result   **Reach Out To Vendors** 🔑

Treasury has reached out to both Pepsi and Wells Fargo to increase their participation in campus recruiting events.

There are no actions for this objective.

Goal   **Improve Operational Efficiency** 🔑

Treasury will evaluate and deploy solutions to improve the efficiency of the University's operations.

Objective (P)   **Automated Solutions** 🔑

Identify third party solutions that will simplify or facilitate business processes on campus.

KPI Performance Indicator   **3rd Party Solutions** 🔑

- Identify one business process that may be better supported by a third party solution.
- Prepare and submit proposal to VPFO at 1-on-1 meeting.

Result   **Banking Services Implemented** 🔑

Treasury has implemented a comprehensive suite of banking services in collaboration with Wells Fargo Bank. This implementation has resulted in improved fraud prevention, operational efficiency, and better integration with the University ERP system.

There are no actions for this objective.

Objective (P)   **Develop Automated Processes** 🔑

Treasury will continue to develop automated processes to simplify/faciliate business processing.

KPI Performance Indicator   **Automating Processes** 🔑

- Treasury will identify one business process that will be redesigned from a paper-based process to a computer-based solution.
- Prepare and submit proposal to VPFO at 1-on-a meeting.

Result   **Online Check Processing** 🔑

Bursar's Office has moved entirely from a paper-based deposit process for checks to a computer-based online check scanning process. This has required an updated processing and retention process for checks on campus.

There are no actions for this objective.

Goal   **Data Driven Decisions** 🔑

Develop and implement reporting tools and reports that allow visibility into revenue and expense activities across campus.

Objective (P)   **Financial Analysis Models** 🔑

Treasury will develop reporting models to measure performance to budget and support modeling for future periods.

KPI Performance Indicator   **Reporting Models** 🔑

- Develop reports to track the current year revenue generated from the investment of operating funds.
- Create a model to predict future revenues that will be generated by our investment activities.

Result   **Debt Analysis** 🔑

Treasury has delivered a holistic schedule of outstanding debt by funding source. This view of institutional debt was created with the goal of better aligning new debt issuance with the needs of the campus.

Result   **Financial Modeling** 🔑

Treasury is developing additional tools to project revenues from investment of operating funds.

There are no actions for this objective.

Objective (P)   **Benchmarks And KPI's** 🔑

Treasury will identify benchmarks and develop KPI metrics that monitor and compare institutional performance.

KPI Performance Indicator   **Departmental Efficiency/Effectiveness** 🔑

- Treasury will identify industry-specific benchmarks and develop related KPI's.
- Prepare and submit report to VPFO.

Result   **Performance Metrics** 🔑

Treasury is evaluating the performance of university endowment funds versus peers on a quarterly basis.

Result   **External Review Of Operations** 🔑

Treasury has requested Wells Fargo to perform an initial review of our operations to ascertain how we can further improve our efficiency and turnaround time.

There are no actions for this objective.

Goal   **Innovate And Identify Disruptive Change Opportunities** 🔑

Identify opportunities to increase institutional revenues, explore privatization/contracting, and evaluate departmental effectiveness.

Objective (P)   **Increase Revenues** 🔑

Develop and implement solutions that increase institutional revenues.

**KPI
Performance
Indicator**   **Revenue Enhancement** 🔑

- Change investment strategies for operating funds.
- Consider new alternatives to generate additional alpha from endowment funds.

Result   **Updated Investment Strategies** 🔑

Implemented a new investment allocation for long-term operating funds. It is anticipated that these new allocations will generate better returns for the University on a long term basis.

There are no actions for this objective.

Objective (P)   **Privatization And Contracting** 🔑

Explore opportunities to increase revenue, reduce cost, or increase efficiency.

**KPI
Performance
Indicator**   **Privatization And Outsourcing** 🔑

- Treasury will identify one activity that can be outsourced.
- Prepare and submit proposal to VPFO at 1-on-1 meeting.

Result   **Beverage Vending And Pouring** 🔑

Treasury led the effort to evaluate and recommend a beverage partner for the campus. This represented the first University-wide pouring rights agreement for the campus.

There are no actions for this objective.

Objective (P)   **Departmental Effectiveness/Efficiency Evaluations** 🔑

- Treasury will collaborate with institutional efforts focused on organizational efficiency.
- Identify external consultant support as needed.
- Engage external consultants to evaluate departmental operations.