Assistant VP of Finance and Operations

Customer Focus

Goal Description:

Identify opportunities to re-engineer processes and/or policies that transfer the focus from transaction based to customer based.

RELATED ITEMS -

RELATED ITEM LEVEL 1

Comprehensive Tax Program

Performance Objective Description:

Create a comprehensive tax program to support initiatives and needs across campus.

RELATED ITEM LEVEL 2

Tax Program

KPI Description:

Development of a tax compliance program to consolidate all issues and provide expertise from a centralized tax office.

Results Description:

Candidates have been interviewed and offer is pending.

RELATED ITEM LEVEL 1

Development of a Moving Expense policy

Performance Objective Description:

Development of a Moving Expense policy to provide guidance and procedures for employees and ensure proper reporting protocol.

RELATED ITEM LEVEL 2

Moving Expense Policy

KPI Description:

Development, publication and implementation of new policy that eases customer use and provides timely internal processing for tax and reporting purposes.

Results Description:

Policy was developed and implemented.

Increase efficiency through automation

Goal Description:

Implement automated solutions and streamline current processes to provide enhanced user experience and optimize efficiencies.

RELATED ITEMS -

RELATED ITEM LEVEL 1

Implementation of Chrome River Travel and Expense software

Performance Objective Description:

Implementation of Chrome River, Travel and Expense software to enhance user experience from travel approval through expense reporting. This includes enhancement of the p-card reconciliation process.

RELATED ITEM LEVEL 2

Chrome River Travel and Expense

KPI Description:

Implementation and deployment of new travel and expense software including pcard reconciliation.

Results Description:

Currently under configuration with scheduled deployment for Spring 2018.

RELATED ITEM LEVEL 1

Implementation of Retirement Manager-specifically Common remitter and enhancement of Human Resource self service offerings.

Performance Objective Description:

Common Remitter allows front end user experience enhancement and self service options as well as back-end office processing improvements, including reporting and timely, automated submission.

RELATED ITEM LEVEL 2

Implementation of Retirement Manger for front end use and back end office Common Remitter processing.

KPI Description:

New software to allow front end use for customers and back end processing using the Common Remitter functionality.

Results Description:

Contract currently under review with implementation now slated for Spring 2018.

Provide leadership and vision

Goal Description:

Provide leadership and vision for initiatives that enhance resources and infrastructure, including campus expansion.

RELATED ITEMS –

RELATED ITEM LEVEL 1

Implementation and engagement of TSUS business processing by launching the payroll function locally at SHSU.

Performance Objective Description:

Provide leadership and guidance for implementation and engagement of TSUS business processing by launching the payroll function locally at SHSU.

RELATED ITEM LEVEL 2

SHSU-TSUS payroll project

KPI Description:

Implementation of TSUS payroll to be handled locally by SHSU payroll office.

Results Description:

RELATED ITEM LEVEL 1

Organize and lead the Texas State System User Group

Performance Objective Description:

Organize and lead the Texas State System User Group that brings together the system finance leads to combine knowledge and skills and leverage the TSUS combined strengths.

RELATED ITEM LEVEL 2

TSUS User Group Meeting & Palnning

KPI Description:

Deployment of a TSUS User group for Finance and well as other tangent groups to meet at scheduled intervals to network and discuss changes, updates, policy, etc.

Results Description:

First TSUS Finance Officer Meting held 07/11-07/12/2017. Future initiatives include development and hosting of "Procurement Council" for all TSUS component institutions.