

Student Life Financial Management Program Review Action Plan Summary

Program Review Details

Self-Study Standards: Council for the Advancement of Standard's (CAS) General Standards Self-Assessment Guide 2019.

Virtual Site Visit Dates: April 26th – April 28th, 2023

Action Plan Objectives:

Based on the program review external committee recommendations and self-study findings, the following themes and action steps were created as strategic priorities for Student Life Financial Management (SLFM) over the next five years.

Communication Improvements

- Enhance Director and AVP insight into financial reports and the budget process.
- Establish dotted lines of communication between Business Manager 2s and the Directors and Associate Vice Presidents (AVPs) across the Office of Student Life.
- Communicate internal policies to a broader audience to facilitate better understanding of university policy and how to be good stewards of university resources.

Reporting Enhancements

- Provide monthly financial reports to AVPs and Directors using Tableau, including education on dashboard use.
- Provide FOCUS team with the opportunity to ask questions, understand processes better and voice concerns to create a better sense of partnership with and visibility into SLFM.
- SLFM will reach out to other areas at the University to collaborate on what is working or being developed for reporting tools.
- SLFM will continue to develop representation on the University Enterprise workgroup.
- Begin to look at other possible software solutions outside of Tableau that could be utilized for reporting solutions.
- Explore how data from the Ohio State Reporting & Analytics Environment (RAE) can be fed into SLFM reports.

Enhance SLFM Staff Training

- SLFM will continue utilizing Management Advancement for Public Services (MAPS) courses and blocks for staff professional development.
- Facilitate knowledge sharing across business managers to drive stronger reporting.

- Business Manager 1s and Fiscal Officers will cross-train so that they can share best practices and standardize policies across the Office of Student Life.
- Improve opportunities for professional development and collaboration with other higher education professional organizations.
- Use trainings through Central Association of College and University Business Officers (CACUBO) to provide consistent onboarding and training.

Departmental Evaluation & Policies

- Establish more consistency in relocation and professional development budgets.
- Solicit feedback from stakeholders and staff on SLFM services, ensuring transparent communication of results and consistent measurement.
- Partner with central units at the University to train Office of Student Life staff so that there is a common understanding of policies and processes.

Last updated: August 30th, 2023