

# Strategic Business Services

## Strategic Plan 2018



# *Vision, Mission & Values*

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## **OUR VISION**

A vibrant Cal Poly community where every student, faculty and staff member is equipped to thrive.

## **OUR MISSION**

Drive Cal Poly's success through operational expertise and strategic innovation.

## **OUR VALUES**

We put service into action:

**S**TRATEGIC

**E**THICAL

**R**ESULTS-DRIVEN

**V**ISIONARY

**I**NCLUSIVE

**C**OLLABORATIVE

**E**MPOWERING



CALIFORNIA POLYTECHNIC STATE UNIVERSITY



## *Strategic Direction #1*

Provide effective and innovative stewardship of institutional assets and resources.

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SBS will excel at its core functions - procurement, payment, logistics, administrative compliance, risk management, and real estate – while pioneering new strategies to maximize university resources.

GOAL(S)	OBJECTIVE(S)
<p><b>1</b> Achieve \$15 million in benefit to the university through procurement, payment, and logistic functions focusing on:</p> <ul style="list-style-type: none"> <li>• Forecasting and sourcing procurements</li> <li>• Negotiating agreements that leverage campus, regional, CSU, or national partners</li> <li>• Revenue generation</li> <li>• Optimize payments for discounts</li> <li>• Ensuring vendor performance</li> </ul>	<ol style="list-style-type: none"> <li>1. Engage stakeholders across the university to understand their needs and align goals, priorities and plans.</li> <li>2. Develop forecasts and procurement plans for 80 percent of key procurements.</li> <li>3. Create CSU Collaboration Centers of Excellence and establish annual projects.</li> <li>4. Adopt revenue generation and ROI as key benefit metrics with strategies to maximize both.</li> <li>5. Establish requirements and implement electronic invoice processing.</li> <li>6. Implement a vendor performance program, achieving contract performance with select agreements.</li> </ol>
<p><b>2</b> Implement a travel management program with Concur software to more effectively steward resources.</p>	<ol style="list-style-type: none"> <li>1. Review existing business processes, adjust to future requirements.</li> <li>2. Develop a message and communication plan.</li> <li>3. Test and pilot with select clients.</li> <li>4. Implement, manage, and control travel program.</li> <li>5. Complete team and client training on travel program.</li> </ol>
<p><b>3</b> Implement distribution &amp; logistics improvements with a focus in Student Housing and improving the student experience.</p>	<ol style="list-style-type: none"> <li>1. Establish Service Level Agreement with Housing to right-size staffing, budget, and metrics to meet client and leadership expectations.</li> <li>2. Implement package lockers and virtual mail boxes in YTT and Poly Canyon.</li> <li>3. Review possible revenue generation opportunities, such as storage, last mile, and mail services for all clients.</li> </ol>
<p><b>4</b> Create best practice policies and transactional procedures in the procure-to-pay cycle that promote innovation, mitigate business risk, enhance transparency, and drive efficiency.</p>	<ol style="list-style-type: none"> <li>1. Map existing policies and procedures.</li> <li>2. Build best practice policies and transactional procedures that enhance procure-to-pay.</li> <li>3. Develop a message and communication plan.</li> <li>4. Test and pilot with select clients.</li> <li>5. Implement, manage, and control procure-to-pay.</li> <li>6. Complete team and client training on procure-to-pay.</li> </ol>

## *Strategic Direction #2*

# Attract, develop and retain a diverse and talented workforce.

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Encourage each team member, both staff and students, to understand their strengths, find connection to their work, grow in their profession, commit to giving their best each day, and be motivated to contribute to the organization's success.

GOAL(S)	OBJECTIVE(S)
<p><b>1</b> Ensure a technical, leadership and organizational body of knowledge through professional credentialing and training programs.</p>	<ol style="list-style-type: none"> <li>1. Define a learning culture.</li> <li>2. Provide adequate funding to support professional development needs.</li> <li>3. Develop structure to obtaining professional procurement credential program.</li> <li>4. Develop staff leadership skills through strategic client assignments.</li> <li>5. Create effective succession planning.</li> </ol>
<p><b>2</b> Develop connections and trust among the SBS team.</p>	<ol style="list-style-type: none"> <li>1. Enable a culture of collaboration and cultivation.</li> <li>2. Define and develop individual and team strengths.</li> <li>3. Establish Employee Development Plans for each team member.</li> <li>4. Establish norms that build our collaboration and cultivation culture, such as team events, assessments, open feedback for all, etc.</li> </ol>
<p><b>3</b> Offer competitive compensation packages to attract and retain a talented workforce.</p>	<ol style="list-style-type: none"> <li>1. Identify impacted job classifications.</li> <li>2. Complete market compensation study.</li> <li>3. Include starting salary range in all position advertisements.</li> <li>4. Communicate value of total compensation in position advertisements and interview process.</li> </ol>

### *Strategic Direction #3*

# Create a culture of service excellence and continuous improvement.

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SBS will prioritize client value, adopting a commitment to understand our client's goals with the trust to align, innovate and deliver excellence through continuous improvement.



GOAL(S)	OBJECTIVE(S)
<p><b>1</b>      <b>Develop robust client outreach processes to understand and align to client's needs</b></p>	<ol style="list-style-type: none"> <li>1. Determine client needs via intentional, personal outreach and engagement at all levels.</li> <li>2. Listen and learn from the client's voice.</li> <li>3. Identify any gaps for delivery of customer service excellence.</li> <li>4. Implement customer service improvements.</li> </ol>
<p><b>2</b>      <b>Consistent delivery of excellent operational service.</b></p>	<ol style="list-style-type: none"> <li>1. Provide training for new/current employees.</li> <li>2. Maintain SBS website with the most current guidance, polices and procedures.</li> <li>3. Assign employees to clients and where possible imbed employees in client operations.</li> <li>4. Create simple resources for clients, such as self-service tools, service level agreements, scorecards and dashboards.</li> <li>5. Create internal accountability through monthly workouts, metrics and balanced scorecard that are visually displayed openly.</li> </ol>
<p><b>3</b>      <b>Empower employee achievement and innovation.</b></p>	<ol style="list-style-type: none"> <li>1. Create space that allows employees to innovate.</li> <li>2. Maintain a client-based structure that allows for employees to innovate.</li> <li>3. Develop an employee recognition program to reward achievement and innovation.</li> </ol>
<p><b>4</b>      <b>Be recognized as a leader within the university and a model within higher education for impactful solutions for procure-to-pay, risk management, and real estate development.</b></p>	<ol style="list-style-type: none"> <li>1. Achieve three CSU and national awards for innovation and excellence.</li> <li>2. Imbed sustainability policy and procedures in all procurements.</li> <li>3. Occupy a leadership post in CSU and national professional organizations, such as CPOA, NAEP and ISM.</li> <li>4. Develop advanced construction, facility, and information technology procurement methods.</li> <li>5. Market successes to national professional organizations via presentations, site visits and trainings.</li> </ol>

## *Strategic Direction #4*

Engage, partner and collaborate within the division, across the university and with our external partners.

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SBS will be a trusted partner through a client-driven structure allowing strategic collaboration across A&F, the university and community.

GOAL(S)	OBJECTIVE(S)
<p><b>1</b> Ensure effective communication and strategy among A&amp;F departments.</p>	<ol style="list-style-type: none"> <li>1. Receive feedback from clients via continuous personal outreach and engagement at all levels.</li> <li>2. Interplay meetings with A&amp;F departments to align communication and divisional strategic directions.</li> </ol>
<p><b>2</b> Develop university and CSU partnerships to leverage shared project and resource opportunities.</p>	<ol style="list-style-type: none"> <li>1. Work with university partners to identify, analyze and implement revenue enhancement opportunities.</li> <li>2. Work with CSU partners to identify, analyze and implement revenue enhancement opportunities.</li> </ol>
<p><b>3</b> Develop a supplier outreach strategy and processes to align fit and value.</p>	<ol style="list-style-type: none"> <li>1. Evaluate supplier performance.</li> <li>2. Annual outreach to local, small and key suppliers to maximize sourcing, supplier development and future opportunities.</li> <li>3. Share supplier outreach and development strategies with CSU.</li> </ol>
<p><b>4</b> Leverage A&amp;F operations to increase student employment opportunities and "learn by doing" experiences.</p>	<ol style="list-style-type: none"> <li>1. Engage students and faculty to help identify and implement innovative, cost effective and creative solution to SBS challenges.</li> <li>2. Provide student employment opportunities within SBS.</li> </ol>



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Strategic Business Services