

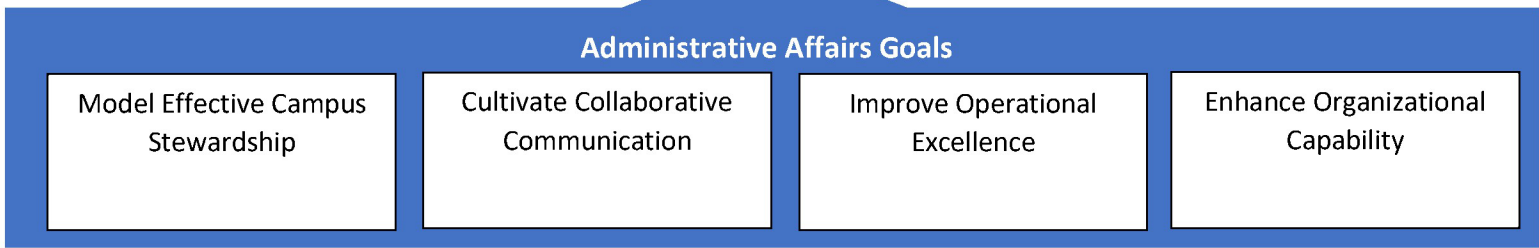


Cal Poly Pomona 2017-2025 Strategic Initiatives

1. Deliver quality programs that promote integrative learning, discovery, and creativity
2. Enhance student learning, development, and success
3. Prepare our students for the future of work, human, and civic engagement
4. Strengthen our economic vitality and impact
5. Advance organization development and employee excellence

Financial Services Strategy Map 2025-2027

<p>Vision</p> <p>Financial Services will be a strategic partner recognized for exceptional customer service, financial integrity, and promoting fiscal and responsible stewardship.</p>	<p>Mission</p> <p>We maintain the University’s fiscal integrity through collaboration to support the strategic goals and objectives of all units on campus to enhance student success through the development of effective, ethical, and best practices.</p>
<p>Values: Collaboration * Integrity * Commitment * Equity * Competence * Continuous Improvement * Transparency</p>	



Continue calendar-driven and high functioning close processes to maintain excellence in financial reporting

Provide streamlined content on the SACS website to promote understanding of student payment process and improve campus awareness of financial policies

Prepare change management and communication plans for campus-wide adoption of P2P and Concur Single Inst.

Implement eStatement to enhance student communication and promote timely payments

Enhance communication and process to ensure timely clearance of financial aid refund

Implement CSU Systemwide platforms (CSUBuy P2P and Concur single Instance)

Digitization and automation of AP workflows

Expand eMarket capabilities campus-wide to accept payments electronically

Increase adoption of direct deposit

Train staff on new CSU systems and workflows

Develop a training calendar and resource library; conduct training and refresher workshops for stakeholders

Enhance workforce knowledge through strategic development opportunities and policy review sessions