

### Support Unit Review Strategic Implementation Agreement-v3-20180406

The primary goal of the Support Unit Review (SUR) process is to provide a mechanism to ensure improvement of support units on a continuous basis. This form has been designed to support the primary goal of the SUR process by containing a set of recommendations that were developed by the VP of the division in which the unit being reviewed resides. The recommendations need to take into account the results of the support unit review and input from both the head of the unit reviewed and the VP to which the unit head reports. The expectation is that the Recommendations, Proposed Actions and Expected Results will reflect a detailed discussion of the review in a meeting between the VP, the head of the unit reviewed and other appropriate parties.

The form is to be completed by the Vice President of the division in which the unit reviewed resides or the vice president's designee.

A copy of the implementation agreement should be held in the vice president's office and in the original file containing documentation of the review. Implementation documentation should be in a form that can be reviewed prior to the next support unit review.

#### Date and time of the review discussion meeting:

#### Review discussion meeting attendees:

#### Recommendations, Proposed Actions and Expected Results:

Recommendations	Proposed Actions	Expected Results
1. Consider forming a unit training team made up of individuals in the unit that are interested, engaged, and excited to share their training and presentation skills with the campus community.	Work within team to identify individuals with interest in campus training. Identify training needs of campus. Test 1-2 trainings in 2018-19 and solicit feedback from campus to adjust as needed.	Core training team identified, and adjusted as needed. Training priorities identified. 1-2 trainings completed by 6/30/2019.
2. Create and post organizational chart of areas of responsibility to help constituents outside of the unit understand whom they should contact with questions.	Create functional area organization charts with contact information. Post to web in appropriate area. Target date 12/31/2018	Better clarity for campus constituents on who is responsible for what with Financial & Support Services
3. Develop communication plan in the planning, execution, and monitor and control stages of the project plans related to training new processes and systems changes to policies.	Develop a basic communication plan framework to use to assess communication needs related to process/system changes.	More consistent process to inform and train campus on changes related to processes/policies/systems for Financial & Support Services.
4. Customer Service Training	Continue efforts in area of customer service training by bringing in outside speaker to speak and/or conduct customer service	Continuous training on customer service, professional development for staff

	workshop for Financial & Support Services group.	
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The following individuals have reviewed the recommendation, proposed actions and expected results.

	Signature	Date
Unit Head/Director	<u>Regan Under</u>	<u>7/27/18</u>
Division Vice President	<u>Barroll Hayden</u>	<u>7/27/18</u>