

**Summary of Initiatives:**

1. Financial Analysis and Training to support decision-making and resource management
  - a. Facilities Master Plan support
  - b. Support accreditation / re-accreditation
  - c. New program analysis
  - d. P&L for current academic programs/support Program Review
  - e. Front-end analysis of UPBC proposals
  - f. Financial training in Banner within functions on a regular basis
  - g. Provide assistance to Academic Affairs in determining whether classes should run
  - h. Evaluate areas to streamline purchasing and accounts payable operations.
  - i. Student Activity Fund
  - j. Offer suggestion box, review suggestions and recognize top cost-saving suggestions
  - k. Creation of financial incentives for sound fiscal management (operating budgets)
  
2. International/study abroad
  - a. Devine scope of program
  - b. Define delivery of program
  - c. Develop cost / budget
  - d. Identify travel requirements
  - e. Develop policies and procedures
  - f. Develop mechanisms for international fiscal transactions
  
3. Grant Support
  - a. Develop expertise and capacity
  - b. Develop policies and procedures for grant administration
  - c. Support President's Initiatives
  - d. Be involved from application phase to end
  
4. Student recruitment/retention
  - a. Facilitate external student internship agreements (nursing, social work, etc.)
  - b. Promote internship experience within Fiscal Affairs
  - c. Develop student labor pool
  - d. Develop use of WestConnect card with local businesses
  - e. Evaluate tuition and fees and state appropriations for NY resident students
  
5. Outreach – Small and Minority Business
  - a. Assist Purchasing Dept with Small Business/Minority Business report
  - b. Promote the State of Connecticut's small and minority business contracting program to help provide visibility
  - c. Work with Affirmative Action and Planning and Engineering to actively market the State of Connecticut Set Aside Program to increase business opportunities
  - d. Work with the local community businesses and the Connecticut Small Business Development Center (SBDC).

**WESTERN CONNECTICUT STATE UNIVERSITY**  
**Strategic Planning Implementation Team – Finance**

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**On-going collaboration with the following groups:**

University Planning and Budget Committee (UPBC)  
Commuter students – informal group  
Residential students – informal group