



*Excellence With Caring*

# Florida Agricultural and Mechanical University

TALLAHASSEE, FLORIDA 32307-3100

FRED GAINOUS, Ed.D., PRESIDENT

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April 19, 2004

Debra Austin, Ed.D.  
Chancellor  
Florida Board of Governors  
325 West Gaines Street, Suite 1614  
Tallahassee, Florida 32399-0400

Dear Dr. Austin:

Enclosed is a draft of the "Action Plans Required for Delivery of Enhanced Business Processes" of Completed Milestones. As requested, updates resulting from the Board of Trustees are marked in the booklet. I am forwarding twenty-five copies of the Completed Milestones, for the scheduled Board of Governors meeting.

A request was made to the Board of Trustees for an extension on Action Plan 004, Milestones 13 and 14. On Tuesday, April 13, 2004, the vote for the extension was passed by the Board of Trustees. With this in mind, we will insert a revised completion date for those Milestones.

Please contact me if additional information is needed. Thank you for your continued support of our efforts to enhance our business processes.

Sincerely,

Fred Gainous

cc: Dr. James Corbin, Chair, FAMU Board of Trustees  
Ms. Carolyn K. Roberts, Chair, Florida Board of Governors  
Ms. Miguel DeGrandy, Chair, Florida Board of Governors Audit Committee

# **Florida A&M University**



## **Action Plans Required for Delivery of Enhanced Business Processes**

Approved by the:  
**Board of Trustees**

### **Completed Milestones**

**Fred Gainous**  
**President**

**April 13, 2004**

## OVERVIEW

This document is a supplement to the January 6, 2004, "Action Plans Required for Delivery of Enhanced Business Processes," approved by the Florida A&M University Board of Trustees. Completed milestones as of April 13, 2004, are enclosed. We have realized significant interim successes by completing approximately forty-eight percent of all milestones (71 out of 149).

The President retains primary responsibility for managing and monitoring the accomplishment of all stated and quantifiable objectives. The Vice Presidents have primary responsibility for managing the accomplishment of each *milestone* pursuant to directives from the President. The President will use Section V (Milestones) of each action plan as an accountability and tracking tool to advance the implementation and progress made on each quantifiable objective.

# **ACTION PLANS REQUIRED FOR DELIVERY OF ENHANCED BUSINESS PROCESSES**

## **RECURRING PROGRESS REPORT**

**Report Date: April 13, 2004**

**Action Plan #: 001**

**Responsible Executive: Hanna/Reese**

**Title: Reconcile \$1,842,180 Discrepancy on FY 2002-2003  
Financial Statements and Ensure the Timely and Accurate  
Submission of Year-End Financial Statements**

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### **I. STATUS:**

Nine out of sixteen (57%) milestones are complete.

### **II. MAJOR ACCOMPLISHMENTS SINCE LAST REPORT:**

N/A

### **III. DIRECTION CHANGES (IF NECESSARY):**

N/A

**ACTION PLAN\***  
**Action Plan #: 001**

**V. MILESTONES (MS):**

<u>MS #</u>	<u>MILESTONE DESCRIPTION</u>	<u>PERSON RESPONSIBLE</u>	<u>BEGINNING DATE</u>	<u>ORIGINAL COMPLETION DATE</u>	<u>REVISED COMPLETION DATE</u>	<u>ACTUAL COMPLETION DATE</u>
1	Reconcile \$1,842,180 discrepancy on FY 2002-03 financial statements	Watson KPMG LLP DOE	12/4/2003	12/31/2003		12/18/2003
2	Validate balance sheet accounts to determine if write-off is required	Watson KPMG LLP DOE	12/4/2003	12/31/2004		12/18/2003
3	Discuss results of University's, DOE's and KPMG LLP's analysis with staff from the Auditor General's Office	Watson KPMG LLP DOE	12/4/2003	12/31/2003		12/18/2003
4	Request final determination for resolution of discrepancy from the Auditor General's (AG) Office staff if write-off is required	Watson	12/4/2003	12/19/2003		12/18/2003
5	Request instruction from AG staff for any other actions required by discrepancy resolution	Watson	12/4/2003	12/19/2003		12/18/2003
6	Request review of AG's recommended action by KPMG LLP	Watson	12/4/2003	12/19/2003		12/18/2003
7	Receive review from KPMG LLP of AG's recommended action to resolve discrepancy	Hanna Watson	12/4/2003	12/19/2003		12/18/2003
8	Request review and acceptance of recommended action by Florida A&M University if write-off is required	Hanna	12/4/2003	12/19/2003		12/18/2003

\*Interim milestones may be adjusted. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.

**ACTION PLAN (Continued)\***  
**Action Plan #: 001**

**V. MILESTONES (MS):**

<b>MS #</b>	<b>MILESTONE DESCRIPTION</b>	<b>PERSON RESPONSIBLE</b>	<b>BEGINNING DATE</b>	<b>ORIGINAL COMPLETION DATE</b>	<b>REVISED COMPLETION DATE</b>	<b>ACTUAL COMPLETION DATE</b>
9	Prepare and execute approved entries as required by AG to correct the financial statements	Watson	12/4/2003	on-going		
10	Review, evaluate and upgrade current staff involved in the processes	Hanna/Reese Watson	12/4/2003	7/1/2004		
11	Assess human and other resource needs	Hanna Watson	12/4/2003	7/1/2004		
12	Request formalized technical training for financial statement preparation from the DFS, Inter-Institutional Committee on Finance Administration (ICOFA), DOE and AG for staff involved in the process	Watson	12/4/2003	3/1/2004		2/27/2004
13	Staff involved in the processes will continue to attend conferences that provide training in university accounting, financial statement preparation and fiscal management	Watson	12/4/2003	6/1/2004		
14	Develop and implement cross training strategies to improve effectiveness of operations	Watson	12/4/2003	7/1/2004		
15	Determine information technology and upgrade skills for staff involved in the processes	Hanna/Reese Watson	12/4/2003	7/1/2004		

\*Interim milestones may be adjusted. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.

**ACTION PLAN (Continued)\***  
**Action Plan #: 001**

**V. MILESTONES (MS):**

<b>MS #</b>	<b>MILESTONE DESCRIPTION</b>	<b>PERSON RESPONSIBLE</b>	<b>BEGINNING DATE</b>	<b>ORIGINAL COMPLETION DATE</b>	<b>REVISED COMPLETION DATE</b>	<b>ACTUAL COMPLETION DATE</b>
16	Begin preparation of interim financial statements for the period 7/1/2003 through 3/31/2004 to validate accuracy of data and proactively facilitate the timely submission of fiscal year end financial statement production to be submitted by May 15, 2004	Watson	12/4/2003	5/15/2004		

\*Interim milestones may be adjusted. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.

**ACTION PLANS REQUIRED FOR DELIVERY OF  
ENHANCED BUSINESS PROCESSES  
RECURRING PROGRESS REPORT**

Report Date: April 13, 2004

Action Plan #: 002

Responsible Executive: Hanna/Reese

Title: KPMG LLP Services: Accelerate and Expedite Analysis Efforts  
and Develop Plans for Implementing the Accepted  
Recommendations

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**I. STATUS:**

Six out of thirteen (47%) milestones are complete.

**II. MAJOR ACCOMPLISHMENTS SINCE LAST REPORT:**

N/A

**III. DIRECTION CHANGES (IF NECESSARY):**

N/A

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**ACTION PLAN\***  
**Action Plan #: 002**

**V. MILESTONES (MS):**

<b>MS #</b>	<b>MILESTONE DESCRIPTION</b>	<b>PERSON RESPONSIBLE</b>	<b>BEGINNING DATE</b>	<b>ORIGINAL COMPLETION DATE</b>	<b>REVISED COMPLETION DATE</b>	<b>ACTUAL COMPLETION DATE</b>
1	Request acceleration of deliverables for fixed capital outlay (FCO), student refund/financial aid and contracts and grants (C&G) accounting processes	Hanna	12/4/2003	12/9/2003		12/9/2003
2	Request assistance to reconcile \$1,842,180 discrepancy on FY 2002-2003 financial statements	Watson	12/4/2003	12/31/2003		12/9/2003
3	Request evaluation of adjusting entries and make recommendations for future statement production	Watson	12/4/2003	12/31/2003		12/18/2003
4	Receive operational study from KPMG LLP for FCO, student refund/financial aid and C&G accounting processes	Hanna Gray-Ray Robinson	12/4/2003	1/15/2004		1/15/2004
5	KPMG LLP to perform testing of current FCO, student refund/financial aid and C&G processes and provide final evaluation of effectiveness and efficiency of each area	KPMG LLP Hanna/Reese	12/4/2003	1/31/2004		1/31/2004
6	Review, evaluate and upgrade current staff involved in the processes	Watson	12/4/2003	7/1/2004		
7	Develop and implement cross training strategies to improve effectiveness of operations	Watson	12/4/2003	7/1/2004		
8	Staff involved in the business processes will attend conferences that provide necessary training to facilitate improved productivity	Watson	12/4/2003	on-going		
9	Assess human and other resource needs	Hanna/Reese Watson	12/4/2003	7/1/2004		

\*Interim milestones may be adjusted as necessary. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.

**ACTION PLAN (Continued)\***

**Action Plan #: 002**

**V. MILESTONES (MS):**

<b>MS #</b>	<b>MILESTONE DESCRIPTION</b>	<b>PERSON RESPONSIBLE</b>	<b>BEGINNING DATE</b>	<b>ORIGINAL COMPLETION DATE</b>	<b>REVISED COMPLETION DATE</b>	<b>ACTUAL COMPLETION DATE</b>
10	Determine and upgrade information technology and skills for staff involved in the processes	Hanna/Reese Watson	12/4/2003	7/1/2004		
11	Evaluate recommendations for business process improvement as submitted by KPMG LLP	Hanna/Reese Watson	1/31/2004	2/28/2004		2/27/2004
12	Develop and implement business process improvements in FCO, student refund/financial aid and contracts and grants accounting processes	Hanna/Reese Watson	3/31/2004	5/31/2004		
13	The University will develop action plans for implementing solutions to KPMG LLP's recommendations	Watson	3/31/2004	on-going		

\*Interim milestones may be adjusted as necessary. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.

# **ACTION PLANS REQUIRED FOR DELIVERY OF ENHANCED BUSINESS PROCESSES**

## **RECURRING PROGRESS REPORT**

**Report Date: April 13, 2004**

**Action Plan #: 003**

**Responsible Executive: Gainous**

**Title: Hire a Vice President for Administrative and Fiscal Affairs**

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### **I. STATUS:**

Twelve out of twelve (100%) milestones are complete.

### **II. MAJOR ACCOMPLISHMENTS SINCE LAST REPORT:**

N/A

### **III. DIRECTION CHANGES (IF NECESSARY):**

N/A

**ACTION PLAN\***  
**Action Plan #: 003**

**V. MILESTONES (MS):**

<b>MS #</b>	<b>MILESTONE DESCRIPTION</b>	<b>PERSON RESPONSIBLE</b>	<b>BEGINNING DATE</b>	<b>ORIGINAL COMPLETION DATE</b>	<b>REVISED COMPLETION DATE</b>	<b>ACTUAL COMPLETION DATE</b>
1	President reports reasons for decline to Board of Trustees	Gainous	4/1/2004	4/30/2004		2/4/2004
2	Advertise in various media including the internet	Robinson Gainous	12/4/2003	1/31/2004		1/22/2004
3	Recruit from local area	Robinson	12/4/2003	2/28/2004		1/22/2004
4	Utilize search firms	Robinson	12/4/2003	2/28/2004		1/22/2004
5	Screen applications	Hanna	12/4/2003	2/28/2004		1/22/2004
6	Conduct interviews	Hanna	12/4/2003	2/28/2004		1/22/2004
7	Make a recommendation to President	Hanna	12/4/2003	2/15/2004		1/22/2004
8	President negotiates logistics for hire					
	Select member of the Board of Trustees to conduct courtesy interviews with the finalist	Gainous	2/20/2004	2/28/2004		1/22/2004
9	Hire a candidate	Gainous	12/4/2003	12/23/2003		12/23/2003
10	Employment begins	Gainous	12/4/2003	2/28/2004		1/22/2004
11	Ensure overlap between Interim Vice President and newly hired candidate to facilitate effective transition	Gainous Hanna	3/31/2004	3/31/2004		2/4/2004
12			3/31/2004	6/30/2004		2/4/2004

\*Interim milestones may be adjusted as necessary. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.

# **ACTION PLANS REQUIRED FOR DELIVERY OF ENHANCED BUSINESS PROCESSES**

## **RECURRING PROGRESS REPORT**

**Report Date: April 13, 2004**

**Action Plan #: 004**

**Responsible Executive: Hanna/Reese**

**Title: Prepare a Financial Plan for the Long-term Viability of Florida  
A&M University**

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### **I. STATUS:**

Seven out of twenty-seven (26%) milestones are complete.

### **II. MAJOR ACCOMPLISHMENTS SINCE LAST REPORT:**

N/A

### **III. DIRECTION CHANGES (IF NECESSARY):**

N/A

**ACTION PLAN\***  
**Action Plan #: 004**

**V. MILESTONES (MS):**

<b>MS #</b>	<b>MILESTONE DESCRIPTION</b>	<b>PERSON RESPONSIBLE</b>	<b>BEGINNING DATE</b>	<b>ORIGINAL COMPLETION DATE</b>	<b>REVISED COMPLETION DATE</b>	<b>ACTUAL COMPLETION DATE</b>
1	Develop a monthly cash flow reporting system	Watson	12/4/2003	3/31/2004		3/31/2004
2	Develop forecasting and budgeting model to facilitate improved fiscal management	Watson	12/4/2003	3/31/2004		3/31/2004
3	Create monthly budget analysis	Watson	12/4/2003	3/31/2004		3/31/2004
4	Formalize accountability for C&G business practices and any other items identified through this action planning process	Robinson Hanna/Reese Gray-Ray	12/4/2003	3/1/2004		2/27/2004
5	Presidential review and implementation of changes based on agreed on accountability plan	Gainous	3/1/2004	3/31/2004		3/31/2004
6	Review, evaluate and upgrade current staff involved in the processes	Hanna/Reese Watson	12/4/2003	7/1/2004		
7	Develop and implement cross-training strategies to improve effectiveness of operations	Watson	12/4/2003	7/1/2004		
8	Assess human and other resource needs	Hanna/Reese Watson	12/4/2003	7/1/2004		
9	Request formalized technical training for financial statement preparation from the DFS, Inter-Institutional Committee on Finance Administration (ICOFA), DOE and AG for staff involved in the process	Watson	12/4/2003	3/1/2004		2/27/2004

\*Interim milestones may be adjusted as necessary. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.

**ACTION PLAN (Continued)\***  
**Action Plan #: 004**

**V. MILESTONES (MS):**

<b>MS #</b>	<b>MILESTONE DESCRIPTION</b>	<b>PERSON RESPONSIBLE</b>	<b>BEGINNING DATE</b>	<b>ORIGINAL COMPLETION DATE</b>	<b>REVISED COMPLETION DATE</b>	<b>ACTUAL COMPLETION DATE</b>
16	Develop routine reports using PeopleSoft to provide accurate, reliable and timely information	Watson Barrington	7/1/2004	on-going		
17	Close FY 2003-2004 and begin financial statement preparation	Watson	6/30/2004	7/23/2004		
18	Close out 13th month and roll balances forward to the automated financial statement system (AFS)	Watson	7/23/2004	7/24/2004		
19	Verify that roll-forward balances are accurately reflected in AFS	Watson	7/24/2004	7/24/2004		
20	Once AFS pre-closing trial balance is verified post accruals and adjustments	Watson	7/24/2004	8/1/2004		
21	Verify accuracy of all entries	Watson	8/1/2004	9/1/2004		
22	Review reports and make any necessary adjustments	Watson	8/14/2004	9/1/2004		
23	Run final reports and prepare footnotes and schedules	Watson	9/2/2004	9/14/2004		
24	Prepare management discussion and analysis	Watson	9/2/2004	9/14/2004		
25	Submit accurate and timely statements, schedules and MD&A to AG's staff and acquire approval from the Auditor General	Watson	9/14/2004	9/15/2004		
26	Develop and implement a plan for improving auxiliary services	Hanna/Reese	12/4/2003	7/1/2004		

\*Interim milestones may be adjusted as necessary. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.

**ACTION PLAN (Continued)\***  
**Action Plan #: 004**

**V. MILESTONES (MS):**

<u>MS #</u>	<u>MILESTONE DESCRIPTION</u>	<u>PERSON RESPONSIBLE</u>	<u>BEGINNING DATE</u>	<u>ORIGINAL COMPLETION DATE</u>	<u>REVISED COMPLETION DATE</u>	<u>ACTUAL COMPLETION DATE</u>
27	Determine the economic feasibility and benefit and, assess the use other external services for reviewing, assessing, evaluating and training staff for managing financial processes	Hanna/Reese	12/4/2003	3/31/2004		3/31/2004

\*Interim milestones may be adjusted as necessary. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.



# **ACTION PLANS REQUIRED FOR DELIVERY OF ENHANCED BUSINESS PROCESSES**

## **RECURRING PROGRESS REPORT**

**Report Date: April 13, 2004**

**Action Plan #: 005**

**Responsible Executive: Green-Powell**

**Title: Analyze and Develop Enhancements to the Financial Aid  
Delivery System**

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### **I. STATUS:**

Six out of twenty (30%) milestones are complete.

### **II. MAJOR ACCOMPLISHMENTS SINCE LAST REPORT:**

N/A

### **III. DIRECTION CHANGES (IF NECESSARY):**

N/A

**ACTION PLAN\***  
**Action Plan #: 005**

**V. MILESTONES (MS):**

<b>MS #</b>	<b>MILESTONE DESCRIPTION</b>	<b>PERSON RESPONSIBLE</b>	<b>BEGINNING DATE</b>	<b>ORIGINAL COMPLETION DATE</b>	<b>REVISED COMPLETION DATE</b>	<b>ACTUAL COMPLETION DATE</b>
1	Advertise in select print media and publications such as the Chronicle of Higher Education for Director of Financial Aid	Green-Powell	12/4/2003	12/19/2003		12/19/2003
2	Screen applications	Green-Powell	12/4/2003	12/18/2003		12/8/2003
3	Conduct Interviews	Green-Powell	12/9/2003	12/23/2003		12/12/2003
4	Make selection/hire candidate	Green-Powell	12/15/2003	3/1/2004		12/17/2003
5	Employment begins	Green-Powell	5/1/2004	5/1/2004		2/4/2004
6	Ensure overlap between Interim Director and the newly hired candidate to facilitate effective transition	Green-Powell	5/1/2004	6/1/2004		2/4/2004
7	Review, assess, evaluate key leadership personnel and upgrade staff as a whole	Green-Powell	12/4/2003	on-going		
8	Develop training workshops for staff on customer sensitive tactics	Green-Powell	1/5/2004	8/1/2004		
9	Conduct workshops on customer sensitive processes	Green-Powell	2/15/2004	8/1/2004		
10	Re-assess skill level of staff on customer sensitive processes	Green-Powell	3/1/2004	8/1/2004		
11	Test ERP software for functionality	Green-Powell	1/15/2004	on-going (in phases)		
12	Conduct skills assessment of current financial aid staff	Barrington	12/4/2003	8/1/2004		
13	Conduct training for new ERP financial aid module	Green-Powell	12/4/2003	6/30/2004		

\*Interim milestones may be adjusted as necessary. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.

**ACTION PLAN (Continued)\***

Action Plan #: 005

**V. MILESTONES (MS):**

MS #	MILESTONE DESCRIPTION	PERSON RESPONSIBLE	BEGINNING DATE	ORIGINAL COMPLETION DATE	REVISED COMPLETION DATE	ACTUAL COMPLETION DATE
14	Determine information technology competencies and upgrade skill levels	Green-Powell	12/15/2003	12/31/2004		
15	Re-assess skill level of staff for new ERP financial aid module	Green-Powell	12/15/2003	8/31/2004		
16	Develop new business process for new ERP financial aid module	Green-Powell Barrington	12/4/2003	12/31/2004		
17	Establish an on-line training environment for new ERP financial aid module	Barrington	12/4/2003	8/1/2004		
18	Define roles and responsibilities of financial aid staff for new ERP financial aid module	Green-Powell Barrington	12/4/2003	8/1/2004		
19	Develop cross training strategies for improved efficiency	Green-Powell	3/15/2004	12/31/2004		
20	Define security limitations based on assigned roles	Green-Powell Barrington	12/4/2003	8/1/2004		

\*Interim milestones may be adjusted as necessary. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.

# **ACTION PLANS REQUIRED FOR DELIVERY OF ENHANCED BUSINESS PROCESSES**

## **RECURRING PROGRESS REPORT**

**Report Date: April 13, 2004**

**Action Plan #: 006**

**Responsible Executive: Collins**

**Title: Strengthen and Enhance Florida A&M University's Brand,  
Image and Messaging**

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### **I. STATUS:**

Twenty out of thirty (67%) milestones are complete.

### **II. MAJOR ACCOMPLISHMENTS SINCE LAST REPORT:**

N/A

### **III. DIRECTION CHANGES (IF NECESSARY):**

N/A

**ACTION PLAN\***  
**Action Plan #: 006**

**V. MILESTONES (MS):**

<b>MS #</b>	<b>MILESTONE DESCRIPTION</b>	<b>**PERSON RESPONSIBLE</b>	<b>BEGINNING DATE</b>	<b>ORIGINAL COMPLETION DATE</b>	<b>REVISED COMPLETION DATE</b>	<b>ACTUAL COMPLETION DATE</b>
1	Restructure current public relations and publications organizations	Collins	12/4/2003	12/12/2003		12/12/2003
2	Conduct media training for staff	Collins	1/26/2004	2/26/2004		
3	Develop a communications planning timeline	Collins	12/12/2003	12/12/2003		12/12/2003
4	Professional review of the planning timeline by a communications and publications firm	Collins	1/6/2004	1/15/2004		1/12/2004
5	Develop University survey instrument	Collins	1/14/2004	1/30/2004		1/30/2004
6	Develop internal and external audience survey	Collins	1/14/2004	1/30/2004		1/30/2004
7	Evaluate and test all surveys	Collins	1/23/2004	2/11/2004		2/6/2004
8	Develop preliminary outline for plan	Collins	1/8/2004	1/12/2004		1/12/2004
9	Conduct peer institution assessment	Collins	1/12/2004	1/19/2004		1/16/2004
10	Conduct an equipment and technology assessment and web presence	Collins	1/23/2004	1/30/2004		1/30/2004
11	Develop requirements document for staffing and sourcing the communication business process	Collins	1/16/2004	2/2/2004		2/2/2004
12	Develop and design printed materials that promote the look, brand and a consistent message for Florida A&M University and the Comprehensive Capital Campaign	Collins	3/1/2004	5/31/2004		

\*Interim milestones may be adjusted as necessary. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.  
 \*\*Completed w/ University-wide staff, faculty and student participation.

**ACTION PLAN (Continued)\***  
**Action Plan #: 006**

**V. MILESTONES (MS):**

<b>MS #</b>	<b>MILESTONE DESCRIPTION</b>	<b>**PERSON RESPONSIBLE</b>	<b>BEGINNING DATE</b>	<b>ORIGINAL COMPLETION DATE</b>	<b>REVISED COMPLETION DATE</b>	<b>ACTUAL COMPLETION DATE</b>
13	Establish policy and procedure committee	Collins	1/19/2004	1/19/2004		2/4/2004
14	Develop focus group plan	Collins	2/9/2004	2/9/2004		2/4/2004
15	Design focus group sessions	Collins	2/11/2004	2/11/2004		2/4/2004
16	Conduct focus group sessions	Collins	2/11/2004	3/1/2004		2/27/2004
17	Complete communications assessment and compilation of findings and peer review	Collins	3/1/2004	3/15/2004		3/15/2004
18	Begin a writing communications implementation plan and budget	Collins	3/15/2004	4/15/2004		
19	Develop media relations policies and procedures; schedule and conduct bi-annual conferences	Collins	3/1/2004	3/31/2004		3/31/2004
20	Integrate plan with Capital Campaign	Collins	4/1/2004	4/8/2004		4/6/2004
21	Integrate plan with School of Journalism and Graphic Communication, the Office of Planning and Analysis and the Media Center	Collins Robinson Hanna/Reese	4/6/2004	4/12/2004		4/12/2004
22	Complete first draft of communications plan	Collins	4/15/2004	4/15/2004		
23	Develop and implement a fully publication and electronic strategy for all internal and external use	Collins	2/15/2004	4/1/2004		4/1/2004
24	Develop Associate Vice President job description for Communications	Collins	3/15/2004	4/1/2004		4/1/2004

\*Interim milestones may be adjusted as necessary. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.  
 \*\*Completed w/ University-wide staff, faculty and student participation.

**ACTION PLAN (Continued)\***  
**Action Plan #: 006**

**V. MILESTONES (MS):**

<b>MS #</b>	<b>MILESTONE DESCRIPTION</b>	<b>**PERSON RESPONSIBLE</b>	<b>BEGINNING DATE</b>	<b>ORIGINAL COMPLETION DATE</b>	<b>REVISED COMPLETION DATE</b>	<b>ACTUAL COMPLETION DATE</b>
25	Determine information technology competencies and upgrade skill levels	Collins	4/15/2004	6/15/2004		
26	Advertise for Associate Vice President for Communications	Collins	4/15/2004	4/15/2004		
27	Hire Associate Vice President for Communications and start employment	Collins	5/31/2004	7/1/2004		
28	Circulate first draft for review	Collins	4/15/2004	4/23/2004		
29	Obtain approval of the communications plan	Collins	4/30/2004	4/30/2004		
30	Begin to implement communications plan	Collins	5/3/2004	5/3/2004		

\*Interim milestones may be adjusted as necessary. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.  
 \*\*Completed w/ University-wide staff, faculty and student participation.

# **ACTION PLANS REQUIRED FOR DELIVERY OF ENHANCED BUSINESS PROCESSES**

## **RECURRING PROGRESS REPORT**

**Report Date: April 13, 2004**

**Action Plan #: 007**

**Responsible Executive: Reese**

**Title: Develop and Implement the Transition Plan [Florida  
Accounting Information Resources System (FLAIR) Devolution Plan]**

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### **I. STATUS:**

Five out of seventeen (29%) milestones are complete.

### **II. MAJOR ACCOMPLISHMENTS SINCE LAST REPORT:**

N/A

### **III. DIRECTION CHANGES (IF NECESSARY):**

N/A



**ACTION PLAN\***  
**Action Plan #: 007**

**V. MILESTONES (MS):**

<b>MS #</b>	<b>MILESTONE DESCRIPTION</b>	<b>PERSON RESPONSIBLE</b>	<b>BEGINNING DATE</b>	<b>ORIGINAL COMPLETION DATE</b>	<b>REVISED COMPLETION DATE</b>	<b>ACTUAL COMPLETION DATE</b>
1	Plan, design and implement all system modules such as: accounts receivable, general ledger, accounts payable, asset management, travel & expense, grants management, purchasing and payroll	Barrington Hanna Robinson Green-Powell Gray-Ray	12/4/2003	1/31/2005		
2	Establish prompt payment rule	Gainous	12/4/2003	3/31/2004		3/31/2004
3	Submit Transition Plan and PeopleSoft configurations documents to the Board of Trustees by CD-ROM	Watson Barrington	12/11/2003	12/19/2003		12/19/2003
4	Submit additional detail related to the preliminary transition plan as requested by DFS	Watson Barrington	12/11/2003	12/23/2003		12/23/2003
5	Approval of Transition Plan by Board of Trustees	Gainous	12/23/2003	1/5/2004		12/23/2003
6	Provide the Board of Trustees approved Transition Plan to DFS	Watson	12/23/2003	1/5/2004		1/5/2004
7	Begin incorporating recommendations from SBE and Department of Financial Services (DFS)	Watson	1/5/2004	5/31/2004		
8	Review, evaluate, assess current staff involved in the processes	Hanna/Reese Watson	12/4/2003	7/1/2004		
9	Develop and implement cross-training strategies to improve effectiveness of operations	Watson	12/4/2003	7/1/2004		

\*Interim milestones may be adjusted as necessary. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.

**ACTION PLAN (Continued)\***

**Action Plan #: 007**

**V. MILESTONES (MS):**

<b>MS #</b>	<b>MILESTONE DESCRIPTION</b>	<b>PERSON</b>	<b>BEGINNING</b>	<b>ORIGINAL COMPLETION</b>	<b>REVISED COMPLETION</b>	<b>ACTUAL COMPLETION</b>
10	Staff involved in the processes will attend training courses to ensure continual development in fiscal areas	Watson	12/4/2003	on-going		
11	Begin production using financial modules	Watson Barrington	7/1/2004	1/7/2005		
12	Begin vendor payment processing	Watson	7/1/2004	1/7/2005		
13	Begin production of payroll	Watson	12/17/2004	12/31/2004		
14	Run first payroll	Watson Woodruff	1/7/2005	1/7/2005		
15	Provide monthly updates for FLAIR Devolution	Watson Barrington	12/4/2003	6/30/2004		
16	Assess human and other resource needs	Watson	12/4/2003	7/1/2004		
17	Determine information technology competencies and upgrade skill levels	Watson	12/4/2003	7/1/2004		

\*Interim milestones may be adjusted as necessary. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.

# **ACTION PLANS REQUIRED FOR DELIVERY OF ENHANCED BUSINESS PROCESSES**

## **RECURRING PROGRESS REPORT**

**Report Date: April 13, 2004**

**Action Plan #: 008**

**Responsible Executive: Reese**

**Title: Analyze, Develop and Implement a Short-term Bridging Plan  
for Ineffective Student, Financial, and Human Resources  
Administrative Software**

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### **I. STATUS:**

Six out of ten (60%) milestones are complete.

### **II. MAJOR ACCOMPLISHMENTS SINCE LAST REPORT:**

N/A

### **III. DIRECTION CHANGES (IF NECESSARY):**

N/A

**ACTION PLAN\***  
**Action Plan #: 008**

**V. MILESTONES (MS):**

<b>MS #</b>	<b>MILESTONE DESCRIPTION</b>	<b>PERSON RESPONSIBLE</b>	<b>BEGINNING DATE</b>	<b>ORIGINAL COMPLETION DATE</b>	<b>REVISED COMPLETION DATE</b>	<b>ACTUAL COMPLETION DATE</b>
1	Screen applications	Hanna	12/4/2003	2/28/2004		12/4/2003
2	Conduct interviews	Hanna	12/4/2003	3/10/2004		12/15/2003
3	Make selection/hire Chief Information Officer	Hanna	12/4/2003	3/31/2004		12/17/2003
4	Employment begins	Hanna	5/15/2004	5/15/2004		2/4/2004
5	Hire consultant to perform assessment	Hanna	12/4/2003	3/31/2004		1/6/2004
6	Assess current system	Hanna/Reese	1/15/2004	3/31/2004		3/31/2004
7	Determine current hardware/software needs	Hanna/Reese	3/31/2004	4/30/2004		
8	Based on assessment of the bridging plan, provide resources to ensure successful continuance until transition to PeopleSoft	Hanna/Reese	4/30/2004	1/31/2005		
9	Review, assess, evaluate and upgrade key leadership personnel and other staff	Hanna/Reese	1/15/2004	7/1/2004		
10	Determine information technology competencies and upgrade skill levels	Hanna/Reese	3/31/2004	on-going		

\*Interim milestones may be adjusted as necessary. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.

# **ACTION PLANS REQUIRED FOR DELIVERY OF ENHANCED BUSINESS PROCESSES**

## **RECURRING PROGRESS REPORT**

**Report Date: April 13, 2004**

**Action Plan #: 009**

**Responsible Executive: Hanna/Reese**

**Title: Evaluate, Upgrade and Train Leadership and Staff Personnel  
Responsible for Business Processes in the Controller's Office**

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### **I. STATUS:**

On February 4, 2004, the new Vice President for Administrative and Fiscal Affairs assumed responsibility for all milestones related to the University's business processes for this action plan, the completion dates for which have yet to occur.

### **II. MAJOR ACCOMPLISHMENTS SINCE LAST REPORT:**

N/A

### **III. DIRECTION CHANGES (IF NECESSARY):**

N/A

**ACTION PLAN\***  
**Action Plan #: 009**

**V. MILESTONES (MS):**

<b>MS #</b>	<b>MILESTONE DESCRIPTION</b>	<b>PERSON RESPONSIBLE</b>	<b>BEGINNING DATE</b>	<b>ORIGINAL COMPLETION DATE</b>	<b>REVISED COMPLETION DATE</b>	<b>ACTUAL COMPLETION DATE</b>
1	Review, assess, evaluate key leadership personnel and upgrade staff as a whole	Hanna/Reese	12/4/2003	7/1/2004		
2	Evaluate employee staffing requirements to maximize productivity and the implementation of all action plans related to financial business processes	Hanna/Reese	12/4/2003	7/1/2004		
3	Conduct an assessment of resource needs (human and other) for all financial business process areas	Hanna/Reese	12/4/2003	7/1/2004		
4	Determine information technology competencies and upgrade skill levels	Hanna/Reese	12/4/2003	7/1/2004		
5	Develop strategies for staff development and training to improve skills specific to the filing of financial statements, reconciliation of accounts and generally accepted accounting practices	Hanna/Reese	12/4/2003	7/1/2004		

\*Interim milestones may be adjusted as necessary. One hundred percent (100%) of the milestones will be completed by or before the related "Quantifiable Objective" completion date.