

**ARIZONA STATE
UNIVERSITY**

UNIVERSITY SERVICES

ADMINISTRATIVE SERVICES



**GOALS
TRACKING
APPLICATION**

STATEMENT OF PROGRAM OR PRACTICE

University Services designed a new innovative Goals Program which was launched February 2004, to manage and report on 75+ division goals. This new, unique program was created in response to the division's challenge to track and measure goal progress and accountability to the President and senior administration. All goals were aligned with President Crow's vision and mission. Formerly, the division updated goals from the Directors via email and then copied the data into a Word document. This process was labor intensive, inefficient and not effective in managing enormous amounts of data. With the creation of a new innovative Goals Database Program, University Services has proven sustained positive results since 2004. This unique user-friendly program is able to meet all the division's needs, i.e. measure progress, track for accountability, searching/viewing goals, capture historical data and produce automated administrative reports. Further enhancements in 2005 were made to include a web application where Directors can now view and update their own goals remotely. This new Goals Program innovation lends itself to widespread application at any institution with minimal modifications and will be shared when partnering with other ASU departments.

INSTITUTIONAL BENEFITS

University Services supports the New American University's vision and mission and is changing the way we do business to meet this new gold standard and design imperatives for The New American University. One of the key changes is accountability to the ASU community, student, faculty and staff and each other; this requires individual commitment! In order to meet our goals, University Services staff must be at work to support, service, build and maintain ASU's New American University. The primary role of University Services is to provide customer service and support to the ASU community. University Services provides that support in the following areas: Capital Programs Management Group; Facilities Management, which includes HVAC, Plumbing, Mechanical, Electrical, Painting, Carpentry, Lock, Sign, Custodial, Grounds, and Moving and Events Services; University Real Estate Development Office, University Architect Office, Administrative Services and Business Operations.

In 2004, The President's Office, Vice President's Office and University Services established goals and objectives to ensure the division's goals were aligned with the President's vision and mission. Each goal is assigned to one or more of University Services' Directors. University Services, Administrative Services is responsible for gathering status updates for all goals from the Directors and submitting those updates to the President's Office each month. The initial process for tracking monthly and quarterly goals began as a very manual, time consuming process of copying and pasting status updates from email to a Word document.

In 2004, University Services launched a new innovative Goals Program in a Microsoft Access database to manage and report on 75+ division goals. This process gave the department the ability to track all goals, report on specific goals, search for goals and allow senior administration to measure progress and ensure accountability. To streamline the process even further, the Access database was later converted to a web application, making the reporting of monthly and quarterly status updates quick and easy.

Today, all monthly goal updates are viewed with ease on the web by the Directors and the Deputy Executive Vice President, University Services/Business and Finance. The versatile accessibility allows timely review of monthly goals prior to submission to the President's Office. It also allows University Services the ability to respond to specific goal status requests in a matter of minutes. In addition, Directors are now independently able to view other division-wide goals that are in progress which may impact their areas of responsibility. An even greater benefit is having all the goals data stored in data tables. University Services can now easily transfer data to the Accomplishments database and the Five-Year Business Plan database. Additionally, the new web application saves the Directors time as they can now provide goal updates from a laptop at a remote location.

University Services strives to track and complete their goals on time, knowing that these goals are critical to the New American University vision and directly impact the development and economic growth of ASU.

INNOVATIVE, CREATIVITY, ORIGINALITY

The new Goals Database Program is very unique and original. The majority of departments and institutions track goals and accomplishments in documents such as Word and Excel. These programs do not have the flexibility of managing significant amounts of data, managing historical data or automated reporting at the click of a button. Typically, there are no provisions for tracking the progress of the goals, no function to alert the owner that a due date is near, therefore, limited accountability. By capturing all goal information in a goals application, that data can easily be reported on.

The application is very user friendly. The Directors login with a secure ID that gives them access to their own goals for editing and access to other Director goals for viewing. To input goal status updates, they select a goal and the “Add a Status” button. A window opens for status updates. The monthly status date is auto populated (ensures consistent dates for all goals). They type in the update and save the input. A very quick process. The application has dropdown menus where the user picks a choice. This standardizes the data and saves typing.

The Goals Database Program innovation is new, unique and original in that it:

- Captures division-wide goal data and stores all data in one location;
- Stores historical goals data;
- Allows push button reporting via a switchboard of macro programming;
- Enables tracking of significant number of goals and data;
- Is easily exported to other applications; and,
- Offers the ability to provide status updates remotely.

University Services tried many methods to track goals and most of those methods were extremely manual and time consuming. Having all the goals data stored in one location with the ability to extract data and produce tracking reports has proven invaluable to University Services.

Additionally, this new innovative program enables University Services to measure progress on initiatives, hold staff accountable, enhance division-wide communications, both up the chain of command to the senior administration and within the division at all levels.

PORTABILITY AND SUSTAINABILITY

Any department at ASU or any institution would be excited to utilize University Services' new Goals Database Program. Most institutions track goals, and this process can be overwhelming if not automated. This comprehensive Goals Database Program is extremely portable, very easy to use and very generic in structure. For another institution to adopt and utilize this database, they would only need to upload their goals data in the tables, while keeping the table structure. The existing input forms could be used, only changing the drop down menus where the user selects their own institution's data, i.e. department name, goal owner, etc. For the switchboards, only the macros that run them would need to be edited. The Reports switchboard would still pull the same reports. All objects in the database would perform the same, only the data behind them would change. The Goals Program is flexible and very portable to any institution.

This goals program lends itself to widespread application and when partnering with other departments, University Services can now share this Goals Database Program and its benefits.

The following measures have been in place for 2 years and have sustained consistent, standardized, and accurate information that minimizes defects, rework and costs.

- There is a list of users. Only those users can login to the application. Each user has a password and a specific role – either update access or view access;
- Directors can only update their own goals;
- The “Add a status” button, auto populates the correct month's date;
- There is a button to ensure they save their input;
- Previous status updates and other “goal “ information cannot be changed;
- There are required fields in red that must be updated – so no missing data;
- After 20 minutes of no activity the user has to login again.

To ensure further accuracy and standardization, when all goals updates are complete, Administrative Services reviews each one for: 1) 100% completion, 2) all completed on time -by the 20th of the month, 3) all the updates are accurate, not conflicting with other Director updates on the same goal, 4) specifically, those goals that go to the President's office are updated, 5) information is in the required format and checked for proper spelling.

Any notable changes to the application are shared across the organization through email to the users. As new users are given access, they are given a Power Point training manual and additional training as needed.

MANAGEMENT COMMITMENT AND EMPLOYEE INVOLVEMENT

The goals were originally published in a Word document called “Goals and Objectives of Administration and Finance – Status Reports”. Each month University Services cut and pasted each goal from the “Goals and Objectives of Administration and Finance” Word document into an email for the responsible Director to update. That update was emailed back to Administrative Services Department, then copied back into the “Goals and Objectives of Administration and Finance” Word document. Once all the goals were updated, a hard copy was provided to the Deputy Executive Vice President, University Services/Business and Finance for review and approval, then emailed to the President’s Office.

Administrative Services wanted to get away from the inefficient, manual tracking of goals and hard copy publication to acquire monthly updates. With new goals being added each fiscal year, existing goals rolling over and new status updates being added monthly and quarterly, manually maintaining the goals through emails and Word documents became unmanageable for University Services. Various options were researched to manage the goals data and it was decided that a Microsoft Access database would be the most efficient method to manage the goals.

The Directors wanted to:

- View their own goals or other Director’s goals and see all status updates.
- Easily search for a goal and track goal due dates.

Administrative Services needed to:

- Search for goals by responsible party, department, goal number, or completion date;
- Run goal tracking reports easily with just the push of a button;
- Designate goals as “complete” and transition them to the Accomplishments database;
- Have a process to archive completed goals for history;
- Export data to other applications as needed;
- Measure progress month to month; and,
- Ensure accountability and view progress of all the goals.

Further requests which eventually led to the Goals Web Application:

- The Directors wanted to be able to input their own goal updates remotely, view them and print them at their convenience;
- They wanted to be able to search, view and print information on specific goals or on other Director’s goals that might impact their areas of responsibility.

All requests have been met and the Directors perceive more value in this application.

The Deputy Executive Vice President’s perceived value is in being able to quickly view 75+ monthly and quarterly goal updates online and provide approval for submission to President Crow.

DOCUMENTATION, ANALYSIS, CUSTOMER FEEDBACK AND BENCHMARKING

Since February, 2004, University Services new, innovative Goals Database Program has run effectively and has sustained positive results. University Services is now able to successfully manage significant amounts of goals data and provide administrative reports with the click of a button. It is imperative in our business to be able to retrieve historical data easily and provide accurate, current status updates on goals in a moment's notice. The manual process of cutting and pasting emails, searching for goals data through extensive documents, binders, and folders, has been eliminated.

Cycle time has been greatly reduced. Our "non-value" added time previously included: copying and pasting data into documents, sending emails back and forth to get updates, manual copying and pasting into a Word document and printing hard copies for approval. With the web application, 1 email goes out as a reminder that goals are due, Administrative Services receives an automated email notification as each goal is completed (no response required). Administrative Services reviews all goals to ensure all are updated, spell checks each goal and the Deputy Executive Vice President approves by viewing online. The goal information is real time and immediately available.

The web application has significantly improved the participation in completing goal updates on time. Specifically, the initial email reminder on the 10th of the month, the 2nd email reminder 2 days before the due date, and the process of locking the application on the 20th of each month to ensure all updates are complete. These have all helped to improve timely participation.

Additionally:

- After the web implementation, 50% of the goal updates have been submitted early. Previously, they were sent "on time".
- Administrative Services now has 100% compliance on goal updating.
- University Services can easily produce the yearly Accomplishments from the "completed" goals.
- The Directors can easily view their completed goals for the year and produce their individual accomplishments quicker.

Administrative Services has sent out 2 email surveys for feedback. The only request was for online spell checking. Administrative Services will be preparing a customer feedback survey to assess future enhancements from the users/customers.


The program promotes participation from the Directors and since it is a web-based program, the goals are available real time for viewing.

MS ACCESS DATABASE APPLICATION

DIRECTORSELECTNAME2 : Form

PRESIDENT'S MONTHLY GOALS

(Monthly updates due by 3rd Friday of every month)



1. SELECT YOUR NAME:

Dave Brixen, Director	Ron McCoy, University Architect
Dean Hooks, Director	Carrie McNamara-Segal, Director
Leon Igras, Director	Steve Nielsen, University Physical Planner

[Preview / Print ALL President's Goals](#)

2. SELECT YOUR NAME ABOVE FIRST

Update / View Your Active Goals	Preview / Print Your Completed Goals
Preview / Print Your Active Goals	Return to Main Switchboard

GOALS WEB APPLICATION

http://www.hr.asu.edu/HR_Goals/index.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://www.hr.asu.edu/HR_Goals/index.asp

ASU ARIZONA STATE UNIVERSITY

University Services

Goals administration

Enter Goal #, Name or Keyword.
(To see all goals, leave the search box BLANK and click GO)


UPDATE GOALS

President's Goals
Select Active Completed All

[Retrieve Information Monthly](#)

University Services Department Goals
Select Active Completed All

[Retrieve Information Quarterly](#)



QUESTIONS/SUGGESTIONS?
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