

25-26 Direct Report Annual Goals

Pat Kowalski

SVP Administration & Finance; CFO

Advance Financial Stability via the implementation of the university's "Road to 140" initiative.

Improved financial reporting and support of divisional leaders thru standardized practices and materials from the Finance Operations Group.

Publish 3-5 year forecast by 04/30/2025

Improve the service to the constituents served by the A&F division

Master Plan - Review goal with Dr. Pinto

GOAL 1

Goal Description

Advance Financial Stability via the implementation of the university's "Road to 140" initiative.

Goal Type

Strategic

Hoshin?

Yes

% Weight

25

Action(s)/Initiatives(s)

Creation of an organizational planning document that identifies key information and guidance at a macro level. This includes things such as tuition rate increases, salary assumptions for unrepresented and collectively bargained staff, fringe benefit rates, inflation, etc. In addition, information relative to timelines, materials, and processes will also be provided.

Working with the Budget Priorities Executive Committee, present recommended targets for Unrestricted Operating Margin for the aggregate organization as well as targets for individual divisions.

Measurable Outcomes(s)

Planning Manual Published by 90/30/2025

Preliminary Targets Reviewed with BPEC by 11/30/2025

GOAL 2

Goal Description

Improved financial reporting and support of divisional leaders thru standardized practices and materials from the Finance Operations Group.

Goal Type

Operational

Hoshin?

No

% Weight

20

Action(s)/Initiatives(s)

Develop a standardized reporting packet with the Finance Operations Committee

Measurable Outcomes(s)

Align on practices for reviewing results and working with divisional leaders to: (a) understand operations and develop contingency plans, if necessary; (b) forecast year-end performance; (c) adjust future forecasts; and (d) provide strategic business analytics

GOAL 3

Goal Description

Publish 3-5 year forecast by 04/30/2025

Goal Type

Strategic

Hoshin?

Yes

% Weight

25

Action(s)/Initiatives(s)

Develop forecasting processes and procedure with the Finance Operations Committee

Create timeline of forecasting activities

Review progress with the BPEC and Excellence in Financial Resource Management Hoshin team

Measurable Outcomes(s)

Preliminary forecast reviewed with BPEC and Finance Committee in May 2025

GOAL 4

Goal Description

Improve the service to the constituents served by the A&F division

Goal Type

Operational

Hoshin?

No

% Weight

10

Action(s)/Initiatives(s)

Develop improvement plans and tactics by A&F unit based on FY 2025 performance

Measurable Outcomes(s)

Improve performance across the KPI's - published > 06/30/2025

Communicate goals and performance to the UC community on a quarterly basis

GOAL 5

Goal Description

Master Plan – Review goal with Dr. Pinto

Goal Type

Strategic

Hoshin?

Yes

% Weight

20

Action(s)/Initiatives(s)

Develop after aligning on goal with Dr. Pinto

Measurable Outcomes(s)

Develop after aligning on goal with Dr. Pinto