

DIVISION OF BUSINESS AND FINANCE

Our Mission

The professionals who work together in the Division of Business and Finance are dedicated to supporting and enhancing the college's mission by providing excellent and continuously improving services to the entire campus.

Core Values

Balance	We maintain equilibrium between our work life and private life
Collaboration	We work together as a team across all departments
Commitment	We are committed to Davidson as Davidson is to us
Community	We treat each other with respect, support, and compassion
Creativity	We seek new ways to solve problems and better serve our college
Delight	We cheerfully give our customers more than they expect
Diversity	We support and appreciate differences: of opinion, culture, race, color, sex, national origin, religion, age, sexual orientation or disability
Enthusiasm / Fun	We strive each day to make enjoyable our work and our relationships with our colleagues
Excellence	We model the excellence that is Davidson in all that we say and do
Integrity	We uphold the principles represented by the Honor Code
Risk Taking	We are not afraid to try new things in our efforts to continuously enhance our work and we are supported in doing so
Stewardship	We are good stewards of our environment and resources

CARNEGIE GUEST HOUSE

Strategic Plan

2004-05

Mission Statement

It is the mission of the Carnegie Guest House staff to provide comfortable and pleasant overnight accommodations for the guests of Davidson College as well as to provide an attractive venue for departmental activity and special events. The Guest House also serves as a front door to many campus visitors, where they are introduced to the warm hospitality that is a hallmark of the Davidson experience. The Guest House also hosts outside events bringing positive exposure and increased net revenues to the college, without compromising house resources or other college activity.

Vision Statement In five years or less, we want others to say:

The Carnegie Guest House is a comfortable, welcoming facility with old-world charm combined with all the modern amenities, fully accessible and staffed with very friendly, efficient, and informative staff. Perspective guests can view the Carnegie Guest House and make reservations over the web. The Guest House staff provide breakfast, and the spaces for entertainment in the building are gracious and flexible.

Critical Issues

- > There are opportunities to increase overnight room occupancy and corporate meetings that are currently unrealized.
- > We have been asked to investigate the viability of renovating the basement of the Guest House for use as corporate meeting space, a revenue generator.
- > The current reservation system is entirely hand-written and inaccessible except to the person sitting at the Guest House desk. This puts too much reliance on the manager of the house, has contributed to some reservations accuracy problems, and prevents the ability to provide some level of interactivity through the web site for departmental or private inquiries.
- > Current staffing and employee schedules means that there are long stretches of time each day that there is no management-level employee in the house to help guests with needs that arise. At times this leaves guests confused or dissatisfied with the quality of our service.
- > There is currently a plan for development of a conference center hotel at Exit 30. This could impact both overnight and conference bookings.
- > Because it serves as the "front door" to campus some tension exists between that function and dining and meeting events.

Strategic Goals

- > Increase occupancy from 68% to 80% over the next five years (approximately one additional booking per night).
- > Develop a business plan for the basement that takes into account capital costs of the renovation, ongoing support costs, marketing and promotion, potential customers, industry rates, meeting amenities, parking and accessibility. If given the go ahead, implement the plan. (this year)
- > Identify networkable software for reservations that has the capability of tracking customer history and allows prospective guests to inquire as to availability of rooms on-line through the Guest House web site. This software should allow customers to click on pictures of each room and allow them to make reservation requests or to be put on a waiting list should all rooms be previously reserved. Look for a system that also includes an option for obtaining customer feedback or that will interface with such a customer feedback tool. (year one – will be informed by web content management solution)
- > Assess need to provide broader coverage of the house for guests. If it is determined this is an appropriate strategy, staff and schedule appropriately. (year one)
- > Determine the appropriate level and timing of dining and meeting activity to insure the Guest House does not suffer in its role as the front door to the Davidson campus.
- > Create a protocol for regular monitoring of the Guest House from a maintenance perspective.

CATCARD SERVICES

Strategic Plan

2004-05

Mission Statement

It is the mission of the CatCard Services staff at Davidson College to provide official college identification cards for all faculty, staff, and students and manage the point-of-sale system through which individuals and departments may utilize their cards to purchase a broad variety of goods and services in a convenient and cashless manner, while providing a highly efficient accounting process for hundreds of thousands of financial transactions occurring throughout campus annually.

Vision Statement In five years or less, we want others to say:

The CatCard Services staff provides essential services for convenient living and transaction experiences for students, faculty, and staff across the campus. The system allows students to live their lives and conduct their business on and nearby campus without cash and also functions as a bank debit card. The services are so low-cost compared to other options that virtually all services on campus can be handled through CatCard services. Comprehensive integration between administrative systems on campus allows efficient processing, and record-keeping provides CatCard users with timely updates on their spending.

Critical Issues

- There is no interface between Banner and the OneCard system which results in many hours of extra labor every month.
- Our current cost structure for off-campus merchants is prohibitively high for many to join in.
- Very little is done to market to parents and students the positive attributes of the declining balance option.
- There are still opportunities on campus to expand the CatCard program (post office, printers, anywhere cash or inefficient department transactions are currently utilized).
- Many schools have entered into partnerships with banks to support their program financially and increase the functionality of the ID card. This is an opportunity we have not pursued.
- Internally, the up-charge to students and fees charged departments that are CatCard partners are perceived as being very high. This erodes our relationship with these constituents and prevents some departments from being a partner at all.

Strategic Goals

- Create marketing plan targeting students and their parents that:
 - Promotes off-campus merchant options
 - Sells benefits of cashless existence
 - Provides incentives for frequent users
 - Includes a random rewards programs

(05-06)

- Increase deposits into the CatCard declining balance account to \$2 million by year 5. Utilize contacts through National Association of Campus Card Users to find effective strategies of promotion. (by 2010)
- Develop a business plan that promotes and encourages use of the OneCard system, departmentally, more broadly throughout campus. Specifically eliminate commission fee to all departments utilizing the CatCard system. (09-10)
- Add at least two new off-campus merchants to the program – specifically targeting CVS and Bonsai Grill. Study commission structure to insure proper balance is struck between economic return and greater flexibility for students. Increase revenues generated by the off-campus program by approximately \$2500 per year for the next five years.
- Explore banking relationship that can fund CatCard Program and/or purchase of new ID card system provider. (05-06)
- Create on-line forms for parents and students to sign up for meal plans and make CatCard deposits 24/7. (05-06)
- Determine operational efficiencies and new revenue streams that will allow department to reduce or eliminate \$10 annual up charge to students by year 5.

CATERING Strategic Plan 2004-05

Mission Statement

It is the mission of the Davidson College Catering Service staff to provide to the college community, as well as to outside guests, the highest quality of distinctive food and service in a financially responsible manner. Also, in the spirit of hospitality, we provide our customers with a worry free culinary experience that allows them to focus on their objectives and goals. Davidson College Catering meets a level of excellence commensurate with the college's historic standards, thereby, effectively supporting the full range of college activities.

Vision Statement In five years or less, we want others to say:

Davidson College Catering is one of the top caterers in the greater Charlotte area, evidenced by feedback from campus customers who frequently attend catered events throughout the region. Davidson College Catering, known for its impressive level of sophistication and class, meets the same level of excellence for which the college is widely known. Campus departments have the freedom to choose any caterer they wish, but enthusiastically make Davidson College Catering their first choice for events big and small. Off-campus groups are drawn to utilize campus facilities during college down times by the sterling reputation of the catering department, thereby bringing significant new dollars into the college budget. Davidson College Catering is an integral part of the "Davidson Experience" helping the college meet the high standards alumni, friends, students, faculty, and staff have come to expect.

Critical Issues

- The college calendar has severe peaks and valleys during the year that make it difficult to establish a consistent supply of temporary employees who are talented and have specific Davidson College experience.
- Obtaining permanent and temporary wait staff employees due to lack of competitive wage structure.
- Successful recruitment and employment of trained and skilled wait staff.
- Campus departments are free to hire off-campus caterers for events.
- Permanent staff are not well-trained on an ongoing basis on Cater Pro, general computer skills, and in catering, culinary, and supervisory related areas.
- Campus departments often perceive they are getting better value from off-campus caterers.

Strategic Goals

- Establish a readily available cadre of high quality, experienced, temporary employees to staff events throughout the peaks and valleys of the catering schedule. (on-going)
- Fill in “valleys” in the schedule to support addition of permanent staff with event management ability. In turn this should raise the standard of the full range of our events.
- Maintain current departmental business and increase that business by marketing to and educating faculty and staff through a regular newsletter and on-line ordering options. (05-06)
- Specifically study the area of catering that is the source of much price complaint and lost business – lower budget, casual dining. Determine how and if we can compete with the perceived Jason’s Deli, McAlister’s, and similar caterers (or if it makes fiscal sense to try to). If it is apparent that value difference is perceived, but not real, use marketing and educational steps outlined above to rectify this conception. Adopt a “bid to win” philosophy for these events. (05-06)
- Increase commitment to training of permanent staff to include training on Cater Pro, general computer training, and seminars in catering, culinary, and supervisory related areas. (05-06 and ongoing)
- Become the de facto exclusive cater on campus by winning all departmental business with tactics that might include the following:
 - Broader and more varied menu selections
 - Constantly improving quality of food
 - Better trained and further educated staff
 - More professional and more varied uniforms
 - Improved and upgraded equipment
 - Higher quality linen selection (09-10)

CONFERENCE SERVICES

Strategic Plan

2004-05

Mission Statement

It is the mission of the Conference Services staff at Davidson College to schedule and coordinate use of campus facilities and services by departmental programs during the summer months and by outside groups throughout the year with minimal disruption to the central academic processes. Conference Services staff also provide advice and support to campus departments as they undertake to sponsor professional activity on campus. This activity promotes the college image, generates net revenue for the college budget, and cultivates relationships with individuals, corporations, and foundations potentially beneficial to the college at large.

Vision Statement In five years or less, we want others to say:

Conference Services staff at Davidson College utilize the world-wide-web to maximize customer service and realize labor efficiencies. Potential clients learn about Davidson, explore the breadth of its conference opportunities, and make reservation inquiries through the web which, in turn, serves as a filter for the accelerating number of inquiries.

Conference Services staff at Davidson College provide a high level of professional support and service to both outside and departmental groups creating the highest quality experience for its customers. Clients enjoy thorough and responsive support from their initial inquiry to the successful completion of their event.

Conference Services staff at Davidson College generate new revenue opportunities for the college by leveraging the vast array of newly constructed and renovated facilities on its campus. All the while, Conference Services ensures that outside business activity provides the optimal return possible to the college without compromising the primary educational mission of the college.

Critical Issues

- Outside inquiries have increased dramatically over the past few years taking more and more time from the Auxiliary Director's attention to other facets of his department. We should expect these inquiries to grow in number dramatically as lake area growth continues.
- The current approach to booking outside groups, especially during the school year, has evolved over time and suffers from considerable 'grey area' from one inquiry to the next. This makes it difficult and time-consuming to manage inquiries.
- Responsibility for managing alcohol at non-student, non-departmental events has fallen to our department and it, too, has evolved as practice, not policy over the years. As a result it is difficult to provide clear

answers to departmental inquiries about what is allowed and what is not in this arena.

- Newly renovated Patterson Court Houses (which include air-conditioning) create new opportunities for summer rentals.
- It will be determined in the next few months if the Guest House basement will be renovated to serve as conference and conference-support space.
- The growth of summer and school year activity involving outside groups has dramatically increased the college's exposure and liability from an insurance standpoint. Contractual and insurance requirements have evolved over the years, but it is not certain these are adequate or appropriate for the activity that is taking place.
- During the summer months, athletic camps, which constitute the largest use of residential and dining space, are charged the same rates that departmental programs pay. In other words, every athletic camp represents a lost opportunity cost for higher paying business activity.
- Departmental conference directors and Davidson College coaches push back on price increases. The coaches regard the net revenue they generate from camps as a way the college augments their pay which, in general, resides at the bottom of the Division I market.

Strategic Goals

- Develop Facility Use Policy for Outside Groups that is vetted widely and adopted by the PES. Consequently educate campus as effectively as possible, concentrating on de facto facility managers, members of the Special Events Coordination Committee, and any other service and support providers not represented by these two groups. (04-05)
- Create a Conference Services web site that provides the following:
 - Statement defining the unique experience of renting space at the college
 - Facility Use policy
 - Open dates for outside bookings
 - Insurance requirements
 - Rental rates
 - Contact information
 - E-mail inquiry option as on-line form
 - Photographs of commonly rented space
 - Cad drawings with scale of commonly rented space
 - Contract template(05-06)
- Develop Alcohol Policy for campus that is vetted widely and adopted by the PES. Consequently educate campus as effectively as possible,

concentrating on de facto facility managers, members of SPECC, faculty department chairs, and administrative department chairs. Ensure that the plan provides appropriate protection to the college as it manages alcohol. Obtain legal advice from the college's attorneys as necessary. Recognize that formally bartended events currently bring greater charges to department reception activity. (near completion)

- Hire and train a new Conference Coordinator for outside inquiries that come in for the school year calendar (as distinct from summer programs). (Hiring complete, training essentially complete – Coordinator Manual to be completed 05-06)
- Conduct Risk-Management Audit of outside group activity on our campus (in concert with Physical Plant). Determine if there is activity that is not in our best interests to host or if there are adjustments to our contract, requirements of guests, or college insurance coverage that are called for in order to continue these. (05-06)
- Adopt marketing strategy aimed at high-end corporate clients to optimize our investment in the physical plant and the limited opportunities the college calendar affords. Capitalizing on the opportunities our recently refurbished and constructed facilities provide may require a hard look at how space is utilized currently during the summer months. Success in this area should allow the Conference Services net to college to reach \$100,000 annually within five years. This also holds promise for increased net catering revenue. (by 2010)

DAVIDSON COLLEGE BOOKSTORE
Strategic Plan
2004-05

Mission Statement

It is the mission of the staff of the Davidson College Bookstore to support the educational experience by providing all course materials and related resources necessary for students, faculty, and staff in a financially responsible manner. Additionally, the Bookstore staff provides a wide variety of high-quality college insignia merchandise for all interested college customers that promotes the college name and image beyond the confines of campus.

Vision Statement **In five years or less, we want others to say:**

The Davidson College Bookstore is the best place to purchase textbooks because of the convenience, warm personal service, good price, and the robust used book program. The DC Bookstore provides course material information on-line to all Davidson students, making it easy for students to search and order course materials on-line as well. The DC Bookstore is the place where convenience and service merge to provide the best possible customer experience. The DC Bookstore is also the best source for high quality and affordable clothing and products branded with the Davidson name. Progress is measured on a regular basis through formal and informal surveys, and analysis of sales in order to continuously increase client satisfaction.

Critical Issues

1. Textbook revenues, our core business, are flattening, and environmental factors threaten to cause them to decrease.
2. Potential sales growth is strongest in the categories of gift sales and soft good sales to customers beyond our student, faculty, and staff bodies.
3. Students generally believe Bookstore pricing, particularly on textbooks, is too high if not gouging.
4. Many faculty are unaware or unconcerned about the impact their adoption decisions have on textbook pricing and the availability of used book options for students.
5. Many students, perhaps a growing number, are purchasing textbooks through on-line sources.
6. Our labor costs are increasing at a rate faster than sales and currently exceed industry standards.

Strategic Goals

- > **Develop and implement a marketing plan for the Bookstore that does the following over the next five years:**

- Focuses on alumni and friends of the college as sources for new / additional sales (year one will involve establishing a baseline – to date we have not tracked alumni sales that occur in the store).
- Utilizes the web site to offer products and a “snapshot” of part of the college life resulting in increased on-line orders of at least 10% yearly.
- Utilizes advancing site technology that will allow us to reach specific target markets among alumni and friends, e.g. soccer players, English majors, parents.
- Restructure business toward additional marketing opportunities, such as general trade books, magazines, remainders, imprinted gifts, other college branded items as core business changes, both in price levels and units sold.
- Explores partnerships with alumni and athletics to support and expand our reach to all interested in Davidson College.
- Develops a store logo to better promote branding of all store signage.
- Creates an “everyday priced” or “value-added” strategy to combat student perception of store high prices.

> **Improve the delivery of textbooks to students and educate students to the favorable textbook procedures and pricing policies of the Bookstore by:**

- Educating college community about the textbook value our store provides (convenience, guarantee of edition, availability, ship back, etc.) and other favorable store policies in comparison to national standards.
- Improving faculty communications and adoption process to improve textbook performance including used book buyback and wholesale wantlisting.
- Sharing textbook information more personally with faculty through office visits and requests to attend faculty meetings.
- Studying current procedures of adoption procurement including delivery and deadlines and make more “user friendly” to faculty.
- Utilizing technology to more aggressively engage the used textbook market thereby providing more used book options to students.

> **Better utilize the technology we currently own and acquire commonly used industry technology to improve labor efficiency, control costs, and improve delivery of products to our customers by:**

- Exploring and utilizing report capability of both BookLog and CourseWorks to improve ordering and returns efficiency of both Textbooks and non-book departments through the use of statistics gathered by each system.
- Gain improved efficiency of on-line ordering through an interface between Sequoia System (or new Bookstore web solution) and the BookLog System for realtime inventory generation.

- Lessening “wait time” for students and other customers during rush periods, both through redesign of register area, and possibly renting additional register stations.
- Developing an adoption template for faculty to use on-line.
- Electronically relaying information to wholesale used-book companies as we search for these titles to increase used books we can offer for sale to students.

> **Improve customer service and support by:**

- Educating student, regular and temporary employees in specific customer-favored policies, i.e. greeting customers on arrival, offering assistance as needed, generally, extending attention to give one-on-one feeling to all customers.
- Placing temporary and permanent employees at registers, and using students in departments for restocking, cleaning, and to serve as part of focus groups to assist in ordering more student-oriented merchandise.
- Restructuring and rewriting work-study roles highlighting the business experience the position provides. Give work-study students greater responsibility for departments, educate them on performance of specific items and the department as a whole, and involve them in the decision-making process for expanding or shrinking a department, choosing styles or lines, as well as marketing and promotion of the department.
- Determining budgetary viability of establishing a Fellow position to focus on marketing, promotions, merchandising, and work-study performance.
- Training to improve employee interaction with customers over the phone.
- Training all student and temporary employees at the beginning of Fall semester to assure consistent excellent service for all customers.
- Developing and implementing system of rewards for student employee achievement in the area of customer service.
- Capturing customer feedback in a structured fashion that both assesses our improvement in customer service and identifies areas that need further attention.
- Redepartmentalizing the retail floor to unite categories that are currently split into two or more parts and to arrange categories in a more logical way vis-a-vis one another.

LULA BELL HOUSTON LAUNDRY

Strategic Plan

2004-05

Mission Statement

It is the mission of the staff of the Lula Bell Houston Laundry to provide laundry services to students, college departments, and private individuals. By doing so in a convenient, timely, personalized and financially responsible manner, the College Laundry enables students to spend more time in academic and extra-curricular pursuits and effectively supports departmental activity. Services include the care and handling of personal clothing, bed linens, dry cleaning, and catering linens.

Vision Statement In five years or less, we want others to say:

The Lula Bell Houston Laundry staff continues to provide high quality personal service to its customers by implementing services and programs that provide greater convenience to their lives. The College Laundry has provided broader services and greater accessibility with enhancements like the after-hours laundry drop-off and a larger, more accessible self-service washroom with amenities allowing students to study or relax while waiting on their laundry. Simultaneously the College Laundry has grown its cash business to faculty, staff and students significantly through improved marketing and promotions efforts.

Critical Issues

- The Laundry has maintained a small self-service wash/dry area for student use which is also utilized for laundering delicates by the Laundry staff. This space is available when the Laundry is open. Students make significant use of this space and the SGA has repeatedly requested it be open longer hours.
- The residence hall satellite laundry rooms run the gamut in terms of size of space, condition of equipment, and cleanliness. Maintaining these spaces requires an inefficient commitment of resources by both the Residence Life Office and the Physical Plant. Further, Residence Life could benefit by freeing up some of these spaces for other uses.
- Keeping up with volume increases on "fixed" revenue is a budgetary challenge, particularly in the area of labor, our single largest expense item.
- "Cash customers", meaning faculty, staff and specialty student business, are not cultivated from a marketing or promotional standpoint and represent opportunities for new dollars.
- Should an expanded self-op program be implemented, current responsibilities and roles at the College Laundry do not include its management.

Strategic Goals

- Increase revenue from cash business by developing creative marketing strategies that promote faculty and staff wash-dry-fold business and dry cleaning business from all customers. Utilize web in particular.
- Develop a business plan for the establishment of an expanded self-service washroom option within the footprint of the current College Laundry facility. This would provide expanded service to students and allow consolidation of some small laundry areas in residence halls. Further, existing Laundry staff could efficiently manage this expanded space. Use the plan to gain approval and funding for the project.
- Advocate for additional work-study students in our labor force to control labor expenses as the volume of work increases.

UNION CAFÉ

Strategic Plan

2004-05

Mission Statement

It is the mission of the Davidson College Dining Services staff to provide nutritious, creative, and high quality food and service to students, faculty, staff, friends of the college, and visitors in a fiscally responsible manner. This service provides an opportunity for members of the community to engage in educational discourse and develop professional and personal relationships that enhance the learning experience throughout campus.

Vision Statement In five years or less, we want others to say:

The Union Café staff is a talented group of professionals providing superior quality meals and creative, well-received menus. The staff is responsive to customer requests and adapts quickly to changing customer tastes and industry trends. The Café regularly assesses its place within the broader context of area dining to insure high quality and competitive pricing. The Café regularly measures its excellence through feedback surveys and stays in close touch with customers through the Student Government Association and daily conversation.

Critical Issues

- While customer satisfaction is very high in many areas, speed of service is a clear negative for a large number of our customers.
- There is not appropriate space in the prep and storage area for our current program resulting in an overcrowded and stressful working environment.
- Our customers are pushing us for greater menu quality and variety.
- It is difficult to recruit and retain talented staff, particularly on our night shift.
- The lack of a computerized menu management system causes the Café to be less organized, consistent, and efficient than it needs to be.
- The current menu presentation and ordering system is hard to read and confusing to the customer.
- Our registers are outdated and labor intensive. Also, we are not able to interface with a computerized menu management system that will allow us to be more efficient in production and allow us to reduce and control cost by having the needed reports to manage production forecasting, inventory, and service. Current registers have many problems which prohibit cashiers from providing the speed of service needed.
- Customers regularly complain about pricing.

Strategic Goals

- Through surveying and other feedback channels, test the breadth and quality of our current menu against the strong wish for faster service from

our customers. Be prepared to revamp the current model as necessary. (05-06)

- Increase productivity and efficiency in food production, with special attention to the space limitations of the facility.
- Pursue the purchase of a new combi oven, gas burners, induction units for display cooking, counter space, upright coolers and freezer. (07-08)
- Improve recruitment and training of new employees to obtain willing, productive, and skilled staff. (06-07)
- Build an active data base in Chef Tec. Train supervisors to enter data and effectively manage the system. (05-06)
- Research, design, and display a menu and ordering system that is customer-friendly. (05-06)
- Purchase a new register system that will help us manage our business better while providing speed and quality of service. The goal is to reduce frustration as the customer exits the store while giving management the tools needed to control costs and increase productivity. (05-06)
- Join NACUFS Market Survey Program that will give us on-going feedback (in how we are doing) compared with other programs. (05-06 and on-going)

Increase customer awareness of our place in the dining services market above the fast food segment in terms of pricing, wait-time, variety, and freshness. (05-06 and on-going)

VAIL COMMONS

Strategic Plan

2004-05

Mission Statement

It is the mission of the Davidson College Dining Services staff to provide nutritious, creative, and high quality food and service to students, faculty, staff, friends of the college, and visitors in a fiscally responsible manner. This service and the facility itself provide an opportunity for members of the community to engage in educational discourse and develop professional and personal relationships that enhance the learning experience throughout campus.

Vision Statement In five years or less, we want others to say:

Quality food, diverse menus, professional, warm and personal service, and a convenient and comfortable servery and dining area together make Vail Commons the predominant dining option for all students.

Critical Issues

- Vail Commons is old and outdated which inhibits our ability to satisfy current customers and our ability to attract new customers.
- Our current staff is not prepared to support a renovated servery that includes exhibit cooking.
- Meal plan participation migrates in large number to the Café for the evening meal which knocks a sizable hole in the Vail budget.
- There are still unrealized meal plan dollars from current customers who have small plans and could move up to larger plans as well as from upperclassmen that are not on a meal plan at all.
- Since the purchase of the Chef Tec computer program, it has not been used to its fullest capabilities resulting in lost opportunities to run our operation more efficiently and effectively.

Strategic Goals

- Complete all phases of the planned renovation of Vail Commons. (2010)
- Effectively train our workforce on new equipment, procedures, and menu items, as well as effectively schedule them to succeed in the newly renovated dining facility. (05-06)
- Ensure that managers are trained to utilize Chef Tec to its fullest ability for menu development, costing, and tracking of purchasing data. (06-07)

- Through the excitement and perceived improvement of product generated by the renovation and with a well-conceived and well-implemented marketing plan, increase our meal plan holders 10% (to 1210 plans) over the next five years. Likewise increase our faculty and staff meal plan purchases and pull dinner hour meal plan activity back from the Café.
- Review meal-plan structure and consider changes to pull that business back into Vail Commons. Consider eliminating meal plan equivalencies at the Café and Wildcat Den.

BUSINESS SERVICES

Strategic Plan

2004-05

Mission Statement

The mission of the Business Services' staff is to maintain and enhance the effectiveness and efficiency of Davidson's financial operations. This includes multi-year projections, budgeting, cash flow and cash management, purchasing, and the postal and copying services. We seek to serve our constituents by anticipating and responding to their needs in ways that facilitate the College's mission.

Vision Statement In five years or less, we want others to say:

We provide accurate and timely information that includes appropriate and relevant analysis and conclusions. We ensure that the College complies with all relevant legal and financial reporting requirements related to the annual audits, professional standards from the Financial Accounting Standards Board, Sarbanes-Oxley, UMIFA, the IRS, other Federal and state agencies, and professional organizations. We fulfill our commitments and follow-up appropriately to ensure satisfaction with the services we provide. We continuously improve our processes and use of technology to provide timely information and efficient services. We have an up-to-date web site that is informative and useful. Our policies, guidelines, and procedures are well-reasoned, well known, understood, up-to-date, and easily accessible. We anticipate, think creatively, ask questions, and make observations concerning issues and important trends (e.g. cash flow and multi-year projections), and recommend answers and solutions. Team members are well informed and cross-trained in critical departmental functions. We maintain strong and trusting working relationships and communicate clearly and effectively with all constituents. We have knowledge of campus-wide services relevant to our constituents so we may provide comprehensive solutions to their needs. Our facilities are safe and optimally configured, and meet ongoing needs. We encourage individual team members to develop to their fullest potential.

Critical Issues

1. Enhancing the content on our web sites. This is necessary in order for us to clearly communicate our policies, procedures, and services offered.
(W3)
2. Prioritizing time to allow for additional training, cross-training and acquisition of campus-wide knowledge relevant to our constituents. Cross-training is crucial because we do not have staff redundancies and the resultant deep levels of support or expertise. With only one person per function, cross-training is necessary to handle absences and peak time demands. Also, since campus offices are geographically distant (e.g. Financial Aid), it is important for us to handle basic questions from

parents and students that transcend but are related to our own operations. (W1, V1, V6, V7, T1)

3. Increasing our knowledge of campus-wide and department-specific emergency planning and safety needs. This issue deals with physical safety of personnel in the Controller's Office due to the volume of cash and checks handled, but also with the need to ensure that critical data is backed up on a timely basis. (W2, T4)
4. We must further understand the future copying, printing and postal needs on campus so that we can offer the right services at the right levels to meet customer demands. (T2)

Strategic Goals & Strategies (Goal # corresponds to critical issue #)

1. **Goal** – Expand web pages.

Strategies:

- a. Purchasing/Central Services/Post Office – add FAQ, pricing, preferred vendors, and vendor-related updates – 1 to 2 years.
- b. Business Services overall – based on survey, identify information users would like to have and add to web pages – 1 year.
- c. Susie, Beth, and Jane, to gain additional web knowledge, will attend Front Page/web design classes – 1 year with future updates.
- d. Educate campus on the resources available on our web sites – 1 to 2 years, and then ongoing.

2. **Goal** – Every member of Business Services will receive annual training relevant to his/her respective responsibilities.

Strategy: All Business Services employees will have at least one training opportunity as a performance goal. – one year with annual updates.

3. **Goal** – Obtain training on current emergency plans and develop additional policies and procedures as needed for emergency preparedness.

Strategies:

- a. Attend individualized training class(es) with Chief Fountain Walker on physical security in the Controller's Office– one-year with ongoing updates.
- b. Monitor security information provided by the USPS and attend related training classes as necessary – one year with ongoing updates.

- c. Update departmental policies and procedures as necessary – one to two years with ongoing updates.
4. **Goal** – Further understand the future copying, printing and postal needs on campus and adjust types of services offered to the right levels to meet customer demands.

Strategies:

- a. Conduct on-campus interviews with users of Central Services and Post Office (Beth and staff) – one year with ongoing discussions.
- b. Meet with David Holthouser/Leslie Marsicano to discuss feasibility of package delivery to student dorms. Develop a plan and implement if dorm delivery is viable – one to three years

HUMAN RESOURCES

Strategic Plan

2004-05

Mission Statement

The Human Resources staff work to recruit and retain the most qualified, productive, and diverse employees possible while providing senior leaders with timely information and advice for strategic decision making, so that young men and women are educated broadly for productive and meaningful lives of scholarship, leadership, and service in a complex world.

Vision Statement In five years or less, we want others to say:

In the next five years the campus will say that, employees of Davidson College are part of an increasingly healthy workforce whose diversity matches that of the student body, and total compensation accurately reflects comparable positions in the local and national marketplaces. By limiting time spent on administrative transactions, Human Resources consults with senior leaders and managers, anticipating their needs to help achieve organizational effectiveness, while providing a broad menu of professional development opportunities for all employees.

Critical Issues

- Staff Development and Training
 - Job specific technology training non existent
 - Lack of harassment, diversity, legal issues, conflict management, coaching training leave the college vulnerable to lawsuits
- Increased competition for employees as economic development moves up from Charlotte
- Escalating cost of health insurance – particularly retiree health insurance – competes with other important employee initiatives.
- Communication with employees is inconsistent and often does not reach the intended recipient in a timely manner
- Difficult and expensive to advertise broadly enough to develop diverse applicant pools.

Strategic Goals

- Develop a comprehensive communication strategy
 - Meet people where they work
 - Establish regular and frequent group meeting forum
 - Create or provide leadership to create a regular written communication to keep employees informed of important initiatives, events and news about employees
- Develop and implement an effective staff development and training program
 - Add a training professional to the HR staff.
 - Deliver diversity, legal issues, conflict management, coaching training

- Work with Gender Equity Committee and VPs to regularize harassment training efforts.
- Develop and publicize job specific technology competencies
- Work with ITS and divisional technology experts to design and implement technology training for staff.
- Provide a total compensation package that is competitive with our peer institutions and local companies.
 - Continually review Davidson's salaries against agreed upon benchmarks.
 - Continually review Davidson's benefit package to ensure we are getting the highest value for our premium dollars
 - Implement alternative retiree health insurance program by 7/1/06.
- Complete imaging of all personnel documents by September 2005 and maximize use of this technology by July 2006
- Completely automate all payroll timekeeping transactions by July 2006
 - Hourly paid employees by July 1, 2005
 - Students by September, 2005
 - Salaried employees by December, 2005
- Develop and implement a diversity plan so that the workforce is at least as diverse as the student body

INFORMATION TECHNOLOGY SERVICES

Strategic Plan

2004-05

Mission Statement

ITS creates and maintains technology infrastructure, facilities, and services so that students, faculty, and staff can effectively apply networking, computing, and telecommunications technologies to accomplish the educational mission and business objectives of Davidson College. Our work is based wherever possible on standards for hardware and software. We anticipate campus needs in order to explore and develop solutions as needs arise. Our mission is accomplished by providing services that meet the needs of varied constituents or that focus on specialized technologies.

Academic Technology Services meets the evolving information technology needs of Davidson's academic programs, providing support for faculty in integrating information technology into teaching and learning as well as exploring, developing, and promoting the use of next-generation technologies to support and enrich instruction at Davidson.

Student Computing Services provides facilities and support, including public computer labs, wireless access, and wired network access in residence hall rooms, to meet students' needs for technology in their class work and, to the extent possible, for personal learning projects.

Administrative Systems supports efficient and effective administrative operations through technical support for Banner and other information management systems in the college in order to ensure data security and to provide timely, accurate data as the basis for management decisions.

Help Services solves problems for faculty, staff, and students, helping them to use technology to meet their needs in learning, research, or administration. Help Services is the campus-wide point of contact for assistance from ITS for services, projects, and supported software and hardware.

Desktop Support Services assists teaching, learning, research, and administrative operations by providing standardized, up-to-date, and reliable hardware and software configurations for faculty and staff desktop workstations.

Data Network Services provides a flexible, secure, manageable, and reliable network infrastructure and network-based services to support teaching and learning, scholarship and research, and administrative operations. It manages central systems and servers that support teaching and research, collaboration, communication, data storage, administrative and academic operations, and connectivity to Internet resources.

Telecommunications services provides functional, manageable, and reliable voice services to faculty, staff, and students including voice mail and unified

messaging to support all aspects of college operations. The switchboard assists public callers with professional and helpful service.

Vision Statement In five years or less, we want others to say:

Faculty, staff, and departments consider ITS their partners, helping them achieve their objectives. The department interacts with campus clients at their level of technical expertise; we communicate with clients through multiple channels, clearly, and in language appropriate to the needs of the client. We maintain a high degree of technology expertise in order to provide creative leadership in bringing promising applications of technology to the community. Finally we do our utmost to avoid surprises for our clients with upgrades or downtime except in emergencies.

Critical Issues

Client Satisfaction

- Training, especially in Banner, for new hires, and for new versions of operating systems and office software
- ITS image: enhance client contacts, review / revise policies causing friction with clients

Strategic Systems

- Integrate Banner for seamless interaction with other mission-critical systems such as Blackboard and One-Card
- Consolidate Banner reporting on DW2, eliminating DW and FOCUS; create a catalog of institution-wide reports
- Enhance the content, appeal, and manageability of the college web site with a portal system and content management system; add a secure and flexible system to receive credit card payments
- Provide campus disk storage management that protects data on desktop computers, uses server storage efficiently, and preserves vital data economically
- Network services: services and access are needed for off-campus users while preserving data and network security; reconcile staffing resources with "24 by 7 by 365" demand for emergency response

Institutional IT governance

- Streamline policy development and approval, inform the campus, and make policies understandable and widely known
- Move policy development and enforcement away from ITS to a college-wide level

Strategic Goals

Client Satisfaction

- Work with HR, Banner Team Leaders, PES, and others to design and implement a technology training program that will meet the needs of new and continuing staff. [Expected time: 2 ½ years. Completion indicated by

survey and feedback from department technologists, department heads, and staff.]

- Expand contact and interaction with staff, seeking feedback and explaining plans and programs in order that staff are informed and prepared in advance for new and changed hardware and software. [Expected time: 2 years. Completion indicated by survey and focus groups (JCIT, ACC, and Team Leaders)]

Banner

- Develop and implement a plan to consolidate and manage reporting on DW2 with SQL Server. Develop a catalog of institutional reports and data elements to make reporting available to staff whose jobs require it. [Expected time: up to 3 years. Completion indicated by removal of FOCUS and DW1 server.]
- Develop and implement a plan for real-time integration with Blackboard and One Card. [Expected time: up to 3 years. Completion indicated by real time data exchange between the systems that have been integrated.]

College Web Site

- Cooperate with other concerned departments to undertake a cost-benefit study of adding a portal system to the web site. [Expected time: 6 months. Completion indicated by disbanding the search committee and a college direction set for ongoing development of the web site.]
- Identify and implement a content management system that integrates with institutional priorities for the web site and supports the portal system if one is acquired. [Expected time: up to 2 years. Completion indicated by ability of staff in many college departments to maintain and create new content on the web site without centralized assistance.]

Client Services

- Complete development and roll out a desktop backup system for all essential desktop computers. Institute a system to use server storage efficiently with an economical archive system to store important but little-used data. [Expected time: 4 years. Completion will be in phases: local desktop backup, network backup for selected systems, network backup for all essential computers, archival on line storage for data not in current use.]
- Complete development and roll out secure systems to provide access to campus network services to college staff working off campus. [Expected time: 1 ½ years. Completion indicated by having all work-required access available to college staff from off campus.]
- Engage senior management to make development and publication of institutional IT policies a consultative process in which ITS is involved but does not own. Make policies clear and publicize them widely to the community. [Expected time: 2 years. Completion indicated by having an organized catalog of policies that staff and students understand and follow.]

INVESTMENTS AND CAPITAL PROJECT FINANCING

Strategic Plan

2004-05

Mission Statement

The Director of Investments and Capital Project Financing supports the investment of the endowment fund and other financial assets in order to improve college programs and benefit faculty, staff, and students. The mission also includes managing the debt structure of Davidson College in order to best meet current and future capital needs of the college.

Vision Statement In five years or less, we want others to say:

The Investments area produces top quartile investment returns versus our peers within reasonable risk levels. Staff and committee members utilize information from industry contacts, consultants, and other sources to recommend and implement investment policy, and asset allocation, and to select superior managers.

The Director also manages and monitors the debt policy and structure of the college by striving for an optimal debt structure by recommending new issues or refinancings when appropriate.

Strategic Goals

Broaden and enhance knowledge of alternative investments in order to produce top quartile investment results in the alternative area over the next three years.

Increase contact with colleagues at other institutions in order to share investment knowledge so that overall investment results remain in the top quartile versus peer returns over the next three years.

Efficiently utilize time management, evaluate information from numerous sources, exploit technology, and attend seminars and annual meetings.

Increase dialogue with the Trustee Finance Committee in order to concentrate time and efforts on the most important issues of the Committee members. A measurable difference and frequency in contact would be occurring over the next two years.

PHYSICAL PLANT
Strategic Plan
2004-05

Mission Statement

The Physical Plant Department is a service-oriented team of dedicated and skilled people responsible for building, adapting, and maintaining the facilities, grounds, and equipment of Davidson College in perpetuity.

Our ongoing mission is to provide a high-quality, comfortable, clean, safe Campus environment to best meet the current and future operational needs of the College through exceptional management of resources, the natural environment, architectural integrity, and regulatory compliance.

Vision Statement In five years or less, we want others to say:

The Physical Plant Department envisions all facilities of the College to be well-maintained, with defined and regular cycles of replenishment, replacement and renewal of building components.

Our repair services will be responsive within 24 hours with trained and professional technicians, utilizing the best trade practices. Routine maintenance services will be centrally coordinated so as to minimize disruption to the life of the Campus. Progress and status of work will be communicated through automatic, electronic means as well as via the responding staff.

On campus staffing for routine maintenance and repair services will be 24 x 7 x 365. The alternate shifts will provide better non-emergency response to the future growth of College functions outside of the 8- 5 business day. In addition, alternate shifts will be utilized to better accomplish routine maintenance tasks in unoccupied spaces.

Our preventive maintenance services will execute thorough, cyclical care of buildings to identify and correct preventable breakdowns and extend the life of components.

Responsible for both planning the long term development needs of the College and executing the short term projects that support that strategy, Physical Plant envisions a professional execution of Capital projects that predicts and translates the physical needs of the College programs, unifies all coordination through a designated Project Manager, estimates and executes an efficient project budget, and delivers completed results within allotted timeframes.

Physical Plant envisions the Campus Grounds as aesthetically creative and functional with a variety of species. The Grounds Department will employ environmentally friendly horticultural practices suited to nurture each element.

Physical Plant envisions optimum efficiency of its facilities in utility consumption by incorporating more efficient devices, controlling the peak

demands, and negotiating better contracts, without altering noticeable Campus life.

Overarching each of these, the practices and facilities of Physical Plant will become academic teaching tools whereby Faculty and Students will utilize them in relative studies, free to learn from and experiment with the physical Campus as a laboratory.

Critical Issues

1. Our current Physical Plant has local, stable, long term employees that are engaged with the value system here. This allows us access and responsibility, but also translates into individual performance because of employee pride, rather than performance as a result of administrative procedures. As the population and the area continue to grow, Facilities jobs will be plentiful and we will struggle to compete and maintain consistency of employees. **Can we a) combat turnover, b) instill this value system in our changing workforce and/or c) change our business practices to assume a different workforce,** so that we continue the Davidson value system in Facilities jobs. As facilities maintenance transitions to technology driven operations, **can we integrate new, more technology savvy staff for the new, while maintaining an experienced employee base for the old?**

2. The "Let Learning Be Cherished" Campaign has provided the funding for solving a large percentage of the deferred maintenance on Campus. As the campaign concludes, the renewed facilities begin to wear, and the facilities not in the campaign wear further, **how will we fund and execute the ongoing maintenance needed to keep conditions from deteriorating?**

3. Davidson College strives to respond to all environmental, health, life-safety, accessibility and other regulatory guidelines. **How do we forge ahead with progress in each area on our desired timeline, to avoid a crisis driven regulatory mandate?**

4. As there are more activities around the clock, can we providing a level of routine service, rather than only emergency service, beyond the business day? **Are we taxing our business day resources beyond reason, and is it more efficient to shift staff in broader timeframes to accommodate the new expectation?**

Strategic Goals

1. Create and implement a development program for employees to include an orientation session specific to Physical Plant, a mentoring program that matches new employees to existing employees, a technical training program per trade, and a reward mechanism for progressive title and salary thresholds commensurate with skill and experience milestones. (2006) (Critical Issue 1)

2. Develop a Physical Plant policy and procedure guide. (2006) (Critical Issue 1)

3. Inject cross training to provide a minimum of a secondary technician at every specialized skill function. (2008) (Critical Issue 1)
4. Build a process efficiency in Maximo so that all data is current to the day, and then integrate an automated status report for work orders via email to let customers know of progress. (2006)
5. Utilize open and /or new positions to shift personnel in Building Services and Maintenance Operations to have staff on site Monday – Friday 7am to midnight and Saturday – Sunday 9am to midnight. (2009) (Critical Issue 4)
6. Develop a cyclical maintenance and replacement schedule for major components and equipment with identified funding in the College operating budget.
(2006) (Critical Issue 2)
7. Conduct a risk management audit of the Campus and then prioritize the topics from highest to lowest risk implication. Devise an execution strategy to begin work down the priority list. (2005) (Critical Issue 3)
8. Calculate, engineer and implement at least one building upgrade per year to the central, digital energy management system, funded solely from operational energy savings. (each year)
9. Design and build a replacement central boiler plant with base and peaking boilers with multiple fuel options. (2007)
10. Reduce landscape waste stream to zero by recycling and returning all landscape waste materials back to the campus in useable form. Enhance our Campus recycle/ reduce/ reuse program to cut our solid waste weight by 30%.
(2009)