



Administrative Leadership Performance Assessment

Administrator Name:	<u>David Bea</u>	Title:	<u>Executive Vice Chancellor for Finance and Administration</u>
Campus/Department:	<u>DO-Finance and Administration</u>	Date of Review:	<u></u>
Reviewer:	<u>Lee Lambert</u>	Title:	<u>Chancellor</u>

Instructions: *Comments should focus on competency in meeting the College's Strategic Plan, Chancellor's Goals and Objectives listed below, and Campus/Department goals, as they align with the mission and vision of the College.*

- Goal 1: Engage the College community in efforts to "Reaffirm HLC accreditation and fully commit to the HLC guiding values."*
- Goal 2: Facilitate programs and services leading to increased focus on access and student success.*
- Goal 3: Increase the level of community engagement by the Board of Governors, the Chancellor and administrative leadership team to foster partnerships and strengthen educational opportunities in response to community needs.*
- Goal 4: Enhance and improve the College's engagement, alignment and responsiveness to the needs of the business community, and to economic development opportunities.*
- Goal 5: Strengthen, enhance and increase diversity, inclusion and global education.*
- Goal 6: Strengthen, enhance and develop a culture of organizational and employee learning, accountability, compliance and professional development that supports student success, community engagement and diversity.*
- Goal 7: Strengthen the College's financial position by searching and establishing partnerships to attract more resources at the local, state, national and international levels in support of its vision, mission and strategic directions.*
- Goal 8: Assess, review and strengthen the College organizational structure, facilities and operations in order to fulfill its mission.*

Administrator Self-Assessment (attainment of Goals 1, 2, 3, 4):

Goal 1:

- My staff and I played an integral role in ensuring that the Self-Study was completed accurately and on time and also supported the on-site HLC visit and trip to Chicago.
- The new Records & Information Management department has made great strides in planning and training staff and continues to make progress in improving compliance.
- The Strategic Planning/Budgeting connections have been further developed including the new Planning/Budget subcommittee, [Budget criteria](#) have been developed and implemented.

Goal 2:

- The Adjunct Faculty budget model was modified to enable new distance model and the budget has been modified to support student success initiatives.

Goal 3:

- Finance and Audit Committee completed their first year. The agendas, notes, and materials are available on the [committee website](#)

Goal 4:

- I chaired the VP for workforce search committee and have enabled workforce development funds within the budget.
- We hosted the ATRA/Taxpayer meeting

*logged
10-8-15
BOB*

Reviewer's Assessment of Administrator (attainment of Goals 1, 2, 3, 4):

Administrator Self-Assessment (attainment of Goals 5, 6, 7, 8):

Goal 5:

- I supported development of and investment in International Education Model; provided travel and personnel support for trips

Goal 6:

- Wellness coordinator was hired and the function is up and running
- The new Records & Information Management department is making great strides in planning and training staff.
- Research and report development for ensuring ACA compliance was conducted; first steps for FY16 compliance complete

Goal 7:

- Conducted a lot of work this year at the state level; attending Legislative meetings, working with Lobbyists, and providing Expenditure Limitation training and leadership within the College and statewide

Goal 8:

- Led College-wide reorganization effort
- Implemented self-funded medical plan, and made substitutive changes to benefits structure in FY16 budget (via benefits working group)

Reviewer's Assessment of Administration (attainment of Goals 5, 6, 7, 8):

Instructions: *Comments should focus on competency in meeting the Chancellor's Expectations for Successful Leadership, as they align with the College's Strategic Plan, Chancellor's Goals and Objectives, and Campus/Department Goals, and the mission and vision of the College.*

- *Open & Honest Communication*
- *Fair, Reasonable & Consistent Policies, Procedures, Practices & Processes*
- *Informed Decision-making & Planning*
- *Accountability*
- *Leadership & Management*

Administrator Self-Assessment (Open & Honest Communication):

Communication is always a challenge. Successful improvements this year included new communication forums and other enhancements, including: Budget/Planning Subcommittee; Finance and Audit Committee; Campus Budget Presentations; "[Numbers](#)" newsletter; and CDAS Retreat and meeting attendance to better connect with campus business operations.

Reviewer's Assessment of Administrator (Open & Honest Communication):

Administrator Self-Assessment (Fair, Reasonable, & Consistent Policies, Procedures, Practices & Processes):

I am conscientious about and strive to implement fair, reasonable, and consistent application of policies. Policies updated include: Board Finance-based policies and administration procedures. Comprehensive Purchasing and Contracts process revisions are currently underway.

Reviewer's Assessment of Administrator

(Fair, Reasonable & Consistent Policies, Procedures, Practices & Processes):

Administrator Self-Assessment (Informed Decision-making & Planning):

I am focused on informed and data-based decisions. Highlights from the year include development of a long term financial model, expenditure limit training and projections, adjunct faculty model changes, distance education planning, and an international student model.

Reviewer's Assessment of Administrator (Informed Decision-making & Planning):

Administrator Self-Assessment (Accountability):

I have continued efforts to ensure that the College's finance department is completely transparent and accountable with financial and budget information ([Finance Website](#)). The Finance and Audit Committee has added a lot of valuable accountability with important external constituents.

Reviewer's Assessment of Administrator (Accountability):

Administrator Self-Assessment (Leadership Management):

College leadership: numerous College onsite presentations (budget, administration professional development sessions; reorganization; College Cabinet leadership. I have also continued to develop employees with function-specific certifications (payroll, contracts, purchasing) and other professional development opportunities.

State-wide leadership: Vice President of ACCBOC, Member of Expenditure Limitation Subcommittee, Substitute at AC4 meetings

Industry leadership: Chair of NACUBO subcommittee; facilitated WACUBO annual meeting presentation and support. Finance department also presented at Ellucian Summit on our payroll process successes.

Reviewer's Assessment of Administrator (Leadership Management):

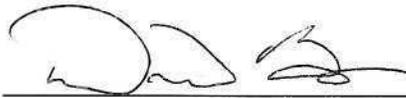
Dave is adapting to the new changes at Pima very well. He is providing key leadership in a variety of areas ranging from a new fiscal reality to monitoring and keeping track of the larger macro forces impacting higher education and community colleges. He has been instrumental in providing greater transparency and accountability related to the College's financial health.

Dave will continue to work in strengthening his knowledge of the interplay of the macro and micro forces impacting higher education and community colleges. He will continue to reassure employees the importance of change.

Overall Assessment / Comments:

David Bea, Ph.D., EVC for Finance and Administration

Administrator: Print Name



Administrator's Signature / Date

Lee D. Lambert, J.D., Chancellor

Reviewer: Print Name



Reviewer's Signature / Date