

2008-09 ACCOMPLISHMENTS

Finance & Facilities

VICE PRESIDENT FOR FINANCE & FACILITIES

- 1) Continue high standards in maintaining a beautiful campus while incorporating sustainability measures as a model for the community and the [higher ed] industry.
- 2) Complete work on the Campus Master Plan and Campus Utilities Master Plan projects.
- 3) Develop a more comprehensive Information Technology security policy and procedures process, along with appropriate documentation.
- 4) Continue phased implementation of VOIP technology, based on funding availability.
- 5) Continue to move software systems to Richfield Disaster site and configure a redundant storage area network at the site. Improve the speed and quality of the encrypted connection between the two sites. Test and document procedures to cut over to disaster site, should it be necessary.
- 6) Conduct cost benefit analysis on items within the employee benefits program to ensure maximization of the employee benefits package as a valuable recruiting and retention tool.
- 7) Implement required employee background check process in a way that minimally damages employee recruitment efforts while providing the additional campus safety presumed by the act's creation.
- 8) Continue to pursue and develop reserve funding equivalent to one year of Utah Summer Games operation, and re-evaluate the sponsorship packages to assure value for potential and existing sponsors.
- 9) Work with staff and sports coordinators to develop and enhance the Summer Games medal ceremonies for athletes, fans, and sponsors.
- 10) Re-evaluate the Utah Summer Games volunteering program, looking to increase awareness of sport specific opportunities and training.
- 11) Through the Budget Office, provide valuable financial planning resources in the preparation and evaluation of new academic program proposals requiring Regental approval.

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VICE PRESIDENT FOR FINANCE & FACILITIES - CONTINUED

- 12) Assist new hires in campus leadership positions by providing them budgetary information and training that will minimize the learning curve necessary for them to be successful in their new roles.
- 13) Involve key university personnel in the creation of a draft Five Year Budget Model.
- 14) Build a case statement of support to present to the Legislature for assistance with construction funding for the new Shakespearean Theatre.
- 15) Finalize revisions to the USF By-Laws & Policy Statements, complete work on the Festival Strategic Plan, and garner governing board approval of both.
- 16) Continue to explore Utah Shakespearean Festival production calendar options, looking for a more flexible rehearsal and performance schedule which might provide additional time devoted to the artistic process and also meet the needs of Festival patrons.
- 17) Meet Festival fundraising goals that will make the operation less dependent upon ticket sales variations.
- 18) Produce internal financial statements and financial indicators reports by September 30, 2009. Establish GASB parameters in Banner Finance, allowing for creation of basic financial statements through Banner software, rather than through a spreadsheet process.
- 19) Reinvent the accounts payable and employee travel authorization/reimbursement processes, looking to streamline the processes; adding value at each step and making them more user friendly.
- 20) Review the surplus property program with an eye towards a more efficient and effective disposition of goods submitted.
- 21) Continue to improve customer satisfaction with the campus [student recruitment] tour process.
- 22) Continue to work towards increased enrollment of specifically targeted populations (ex: graduate students, ethnic minority students, non-resident & international students).
- 23) Successfully integrate the Registrar's Office as part of the Enrollment Management team. (The Registrar's Office joined Enrollment Management on August 1, 2008.)

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VICE PRESIDENT FOR FINANCE & FACILITIES - CONTINUED

- 24) Participate in an electronic transcript exchange in order to better serve students.
- 25) Continue focus on employee compensation & professional development.

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FACILITIES MANAGEMENT

Facilities Management Administration

- 1) Provide user-friendly, web-enabled access for Utility Consumption and Cost Trend Data Tracking.
- 2) Conduct internal facilities condition assessment self-evaluation during the year and report findings.
- 3) Improve Facilities Departmental knowledge by having each manager work within another facilities departmental area during the year.

Facilities Management Business Operations

- 1) Work with newly hired Customer Service Specialist to implement customer service training plan. The focus of this plan will be to improve the Call Center Operator procedures for assisting callers and to improve the customer service of our front line employees. Work with Customer Service Specialist and Managers to implement the new work order system - Sprocket.
- 2) Develop a process for entering expenses into the new work order system so at any given time a report can be generated showing how much was spent on a particular work order or in a particular building.

Utilities Services

- 1) Steam tunnel safety improvements:
 - a) Install communication boxes which will call the campus Call Center in the event of a tunnel emergency.
 - b) Improve underground egress by installing manhole covers that can be removed from the inside.
- 2) Seismic Gas line protection:
Install automatic shut off valves that will isolate SUU's master meter natural gas system from Questar in the event of a magnitude 5.5 or greater earthquake to reduce the incidence of natural gas related fires and explosions.
- 3) Replace pressure reducing valves and large steam valves in Heat Plant to allow for effective oil operation and campus zone isolation.

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FACILITIES MANAGEMENT - CONTINUED

Grounds and Gardens

- 1) Update Grounds department Greenhouse and landscape area around it.
- 2) Develop student crew training checklist for safety/duties/tools and equipment accountability.
- 3) Refine Excellence in Grounds and Gardens presentation and present in September.
- 4) Add more granite pathways (where needed).
- 5) Replace chain link fence between softball field and football field.
- 6) Continue to expand campus tree farm.
- 7) Continue high standards in maintaining a beautiful campus.

Building Maintenance and Renovation

- 1) Update MSDS affecting Building Maintenance Shop. Include all information on website allowing easy access for staff. Implement a procedure to ensure that any new product used on a regular basis is added to the system.
- 2) Improve campus concrete by ensuring every batch meets design standards. Test compaction of soil, slump of concrete, and break test. Upon delivery of concrete, calculate percentage of fly ash to ensure it is 15% or less. Record and file all information associated with concrete mix and tests. Replace 50 yards of deteriorated concrete throughout campus, starting with safety items.
- 3) Implement the parking lot signage phase of the Exterior Signage Master Plan with completion of ADA parking and reserved parking; and update parking lot entrance signs in all main campus parking lots.

Custodial Services

- 1) Green Cleaning: Continue testing environmentally-friendly products and look to expand products into additional buildings.
- 2) Develop Inventory Control and Measurement: Work with the Sprocket system to develop a

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FACILITIES MANAGEMENT - CONTINUED

system which is user-friendly while allowing users to better track resource delivery to each building, with a component which will allow staff to view chemical inventory and equipment inventory available, with a short description of what each product is used for.

- 3) Staff Development: Encourage additional cross-training of supervisors to help with dispersing of responsibilities.

Construction Services

- 1) Continue to update the contractor, consultant, architect, and engineer database on the Facilities Management web site.
- 2) Create a system, with binders for each project, using Management Guide documents, communications and all other obtained documents in a chronological format to aid future project organization, and any others asked to track projects and project information.
- 3) Take at least one training course to update skills on current safety or building codes.

Space Planning, Safety & Risk, Fire Marshal

- 1) Inspect University facilities and grounds to determine areas of safety and liability exposure, and find solutions to these problems.
- 2) Through participation in the Risk Management incentive programs, receive the maximum amount of insurance premium credits available.
- 3) Review and verify the accuracy of building data including the CFI inventory database and insured building and content values.

Motor Pool & Receiving

- 1) Implement an on-line payment system for Automotive Resources, Inc. (ARI) maintenance reimbursements.
- 2) In accordance with the Governor's Energy Efficiency Initiative, promote campus-wide transportation efficiency measures. Ways to promote efficiency may include teleconferencing, ride-sharing, and carpooling when feasible.

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FACILITIES MANAGEMENT - CONTINUED

- 3) Initiate communication to the campus community via campus media and organizations regarding safe travel, preventative maintenance, along with other safety and fuel efficient driving practices.
- 4) Provide options to replace standard mid-sized sedans with hybrid or other fuel efficient vehicles.

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HUMAN RESOURCES

- 1) HR Office Staff Development
 - a) Take advantage of the CUPA-HR Learn Key HR online development courses and webinars to maintain and increase the level of HR expertise.
 - b) Cross train employees to perform recruitment, employment, and benefit work.
 - c) Evaluate current HR staff responsibilities and possible reassignments.

- 2) Employee Staff Development
 - a) Gather and publish information on University training opportunities for University employees.
 - b) Expand the current benefits/payroll orientation to include a general orientation for new staff employees at the time of hire. Transition to a semi annual new staff luncheon to be held in February and August of each year.
 - c) Increase the level of communication with University hourly and adjunct employees.
 - d) Research and propose a new training module for harassment training.

- 3) Customer Service
 - a) Research and propose a new customer service program to aid in the recruitment and retention of students and employees.

- 4) Recruitment
 - a) Identify new recruitment sources and techniques to reach active and passive job seekers.
 - b) Create employee testimonials for the University web site.
 - c) Create pod casts to market employment opportunities.
 - d) Implement employee background checks and prepare for e-verification of social security numbers.
 - e) Research, and implement if applicable, the confidential reference letter option in People Admin.

- 5) HRIS
 - a) Implement new electronic hourly hiring system in Banner Self-Serve.
 - b) Develop and implement new electronic overload & special appointment forms in Banner Self-Serve.
 - c) Develop a more streamlined process for job descriptions and performance evaluations.
 - d) Establish a Banner Help-Desk to answer user questions and provide training.
Coordinating BOF sessions for employees to learn more about how to use Banner.
Have a different BOF/training (Banner HR/Payroll, Banner Finance, Self-serve every three months.

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HUMAN RESOURCES - CONTINUED

- 6) Benefits
 - a) Conduct a cost benefit analysis of the benefit program to insure the maximization of employee benefits package as a valuable recruiting and retention tool.
 - b) Develop a new 403(b) document to meet the new 403(b) regulations that go into effect on 01/01/09
 - c) Assist in the expansion of the current University wellness effort.
 - d) Work with Insurance Committee to release an RFP for medical and dental insurance.

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BUDGET

- 1) Provide budget variance information to departmental budget managers as necessary. Act as a resource to help managers resolve budget challenges/deficits.

Provided tools and information to guide University administration through two rounds of E&G budget cuts. Assisted with budgets for Athletics, Head Start, Utah Shakespearean Festival, Utah Summer Games, and auxiliary enterprises as needed throughout the year.

- 2) Provide support for implementation of new reimbursement policy for mobile phones, including effective tracking and budgeting of all requested phone stipends.

New mobile phone policy was implemented smoothly and without incident. Cell phone stipends have been integrated into the Position Control spreadsheet to ensure reimbursements are properly budgeted on an annual basis.

- 3) Become familiar with bond requirements and take a more active role in the creation and monitoring of auxiliary services budgets.

Auxiliary budgets for the current year were developed and maintained to stay within bonding requirements. Continued coordination with the Vice President for Finance & Facilities, Vice President for Student Services, and auxiliary administrators will be needed to ensure ongoing success in the auxiliary budgeting process.

- 4) Assist with development and implementation of 2009 budget for the Utah Shakespearean Festival.

The 2009 budget process for USF was challenging due to the need for budget reductions throughout the operation in order to balance the budget. However, a balanced budget was successfully finalized and approved by the Board of Trustees. The Budget Office provided support and guidance during the budgeting process.

- 5) Continue development of Budget Office web site.

No new material was added to the website during the year due to lack of staff capacity. However, existing material on the site was kept up-to-date as needed.

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- 6) Research new academic program funding models to gain the expertise necessary to become a value added financial planning resource in the preparation of new program proposals for Regent approval.

Evaluation of funding for new and existing academic programs is currently conducted by the Provost's Office. Even at full staffing levels, the Budget Office may lack the capacity and depth of understanding to adequately support this function.

- 7) Obtain training and involve the expertise of key university employees as necessary to create a draft Five Year Budget Model by fiscal year end.

No progress was made towards this goal, due to the coordination of budget cuts, staff turnover in the Budget Office, and other more pressing requirements during the year. The long-term budget outlook remains uncertain due to the possibility of additional budget cuts, pending the outcome of the 2010 legislative session. A Five Year Budget Model may not be practical or feasible at this point in time.

- 8) Assist new hires in leadership positions by providing financial information and training to minimize learning curves while improving customer service.

Budget training is a key role filled by the Budget Office on a near-daily basis. Meetings with both individuals and groups were held throughout the year to assist account managers with understanding their budgets and University budgetary procedures.

- 9) Enhanced budget analysis and maintenance of non-E & G accounts.

Non-E&G budgets were monitored and maintained to a mostly satisfactory level during the year. Non-E&G budget challenges in areas such as Athletics, Advancement, and Outdoor Recreation were identified and addressed over the course of the year.

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CONTROLLER

- 1) Work with Budget to develop funding models for differing delivery methods of instruction that contain incentives for departments, yet protect the University's support operations.
- 2) Present appropriated fund budget scenarios that present impacts of various enrollment assumptions and waiver decisions.
- 3) Provide administration with financial analyses, methodologies and options for accomplishing the University goal of creating a residential campus, particularly in respect to Residential Living accommodations.
- 4) Provide financial and related statutory, regulatory and policy considerations to the administration for decision-making purposes.
- 5) Produce internal financial statements and financial indicators reports by September 30, 2008.
- 6) Expand standard and general interest monthly and quarterly reports for the administration that are informational, useful, and interesting that can be produced by end-users.
- 7) Re-invent the accounts payable process to streamline vendor payments; increase accuracy in encumbering, liquidating and expending funds; and increasing added value to the process – a continuing goal.
- 8) Reinvent the employee travel authorization and reimbursement process – improving user-friendliness, and departmental cost information.
- 9) Generate new, more informative and pertinent investment reports.
- 10) Complete Finance area policies updates.
- 11) Develop expanded role in managing the financial activities of the University Foundation, including the accounting, investing, funds flows to the University, compliance, growth and reporting issues.

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Finance & Facilities

CONTROLLER – CONTINUED

- 1) Utilize ARGOS report writing to produce financial reports replacing current spreadsheet reports improving timeliness.
- 2) Establish GASB parameters in Banner Finance to allow for creation of basic financial statements through Banner eliminating/reducing the need for the spreadsheet process of creating year-end financial statements.
- 3) Scan documents where feasible eliminating storage issues and allowing for attachment to e-mails.
- 4) Complete review and update of assigned institutional policies.

PAYROLL

Develop Electronic Personnel Action forms for contract payroll (overloads and special appointments), train campus personnel to use the new form and implement it by July 1, 2009.

ACCOUNTS PAYABLE

Expand the use of “direct deposit” payments to faculty, staff and eventually vendors.

ACCOUNTS RECEIVABLE

Enable students to view their student loan accounts and to make payments online.

INVENTORY

Establish a uniform classification system for identifying fixed assets across campus to allow easy identification of all assets. Update procedures, create reports to be shared with asset custodians on a periodic basis.

CASHIER’S OFFICE

Implement new billing process along with new late fee structure to improve student accountability and awareness. Reduce the number of late fee write-offs and improve collection of student receivables.

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CENTRUM TICKET OFFICE

Generate additional revenues through ticket stock advertising, SUU event and ticket office promotion and other non-traditional sources to support the move to a new ticketing system (Jump TV) providing more flexibility and a vastly improved web presence.

MAIL SERVICES

- 1) Update office procedures manual.
- 2) Develop bench marks to measure accuracy of mail delivery to campus departments.

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PURCHASING

- 1) Enhance services to the campus:
 - a) Develop and sign two (2) local vendor purchase contracts.
 - b) Provide leadership and administrative efforts to develop the campus Sustainability **Program through recycling and other conservation initiatives.**
 - c) Continue to expand the campus training program for the Purchasing process and procedures; this will include maintaining the monthly sessions currently conducted and adding larger, more general opportunities.
 - d) Revise internal operating structure of the Surplus Property effort.
- 2) Revise the Purchasing Policy to update specific requirements and address ambiguous segments such as the purchase of Gift Cards and related transactions.
- 3) Develop a comprehensive Contract (non-purchase orders) tracking and monitoring system to ensure compliance and awareness of specific terms.
- 4) Enhance the reporting capabilities through employee development and the utilization of the latest available reporting software applications.
- 5) Develop departmental employees through further educational and professional training.
- 6) Secure a larger, more accommodating location for surplus property storage and processing. This will allow for the more efficient and effective disposition of goods submitted.
- 7) Establish consistency in accuracy and timing of reports to Administration on Purchasing, Surplus, Recycling and Sustainability.
- 8) Complete degree and terminate interim status.