

2009-2010 ACCOMPLISHMENTS

Finance & Facilities

Budget Office

- 1) Continue meeting the budgeting and analysis needs of all campus departments, along with all internal and external budget/reporting deadlines throughout the year. A qualified applicant will need to be hired and trained for the Senior Budget Analyst position to assist with this goal.

All key budget and reporting deadlines were met on a timely basis. In addition to normal annual reports and processes, the Budget Office spearheaded the following initiatives:

- *Reporting for federal State Fiscal Stabilization funds received via the Governor's Office of Planning and Budget (GOPB)*
- *Projecting the financial impact of a separate tuition schedule for online classes*
- *Implementation of another round of E&G budget reductions (third since fall 2008)*

The Senior Budget Analyst position was filled by Mary Jo Anderson in August 2009. Mary Jo required minimal training and quickly began making a positive contribution to the office.

- 2) Coordinate with Athletics, Enrollment Management, and the President's Council to establish preliminary budgets for 2010-11 institutional scholarships and waivers before the recruiting season begins in earnest. Preliminary budgets should be agreed upon and approved by the end of November.

Meetings were held in September and October 2009 and preliminary scholarship budgets were established at that time. Early fall will be the standard timeframe for setting scholarship budgets on an ongoing basis.

- 3) Revise USHE cost study preparation method to more accurately reflect true cost of graduate program instruction. Cost of graduate instruction has likely been understated on cost study submissions over the last several years.

The cost study methodology was revised to present a much more accurate depiction of SUU's true instructional costs, especially at the graduate level. In addition to the standard USHE reporting format (which groups costs by academic cluster), cost figures were also broken down by department and college for internal review. Cost study findings were presented to Deans' Council on 1/11/10.

- 4) Offer periodic budget training sessions to a campus-wide audience. Although the Budget Office provides individual and small group training upon request, general training sessions (similar to those offered by the Purchasing Department) may be a more efficient and comprehensive way to disseminate budgeting knowledge across campus.

In coordination with the Campus Training Committee, a successful budget training session open to the entire campus was conducted on 4/15/10.

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Human Resources

1) Employee Staff Development

Research and propose leadership training for supervisors.

David McGuire researched and proposed a leadership training program for supervisors based on The Leadership Challenge by James M. Kouzes and Barry Z. Posner. (This is the same leadership curriculum that the SUU School of Business is currently using for leadership development. The Human Resources and Staff Association has been very active in coordinating weekly trainings for campus employees during this past year. Each training seminar is followed up with a training survey to measure the success of the training. A central, online training calendar was developed for the campus community. The campus training committee has been expanded to include representatives from both faculty and staff and various campus departments.

2) Recruitment

Update current HR website using web 2.0 interactive technology. Identify new recruitment sources and techniques to reach active and passive job seekers.

This goal is in progress. Julie Merrell has taken the lead with the Human Resource Office Staff and Jill Whitaker to design a new HR website using web 2.0 interactive technology. The design work is completed and the web page content is currently being updated. Lynne' Shurtz has been researching new recruitment resources and techniques. She recently attended the Western Regional CUPA-HR conference and attended sessions dealing with social networking sites. New recruitment websites have also been reviewed and analyzed as potential new sources for reaching passive job seekers.

3) HRIS

Develop and implement new electronic overload & special appointment forms in Banner Self-Serve.

New electronic overload and special appointment forms have been developed in Banner Self-Serve by Travis Rosenberg. He has successfully set up the associated workflow process for the new electronic forms. He has met with end users to refine the process and also presented ongoing training.

Develop additional Argos reports with the assistance of Information Technology.

The on-going process of converting Crystal HR reports into Argos reports is being worked on by the HR staff and the IT staff.

4) Benefits

Work with Insurance Committee to review and propose health saving accounts and or health reimbursement accounts.

David McGuire and Travis Rosenberg have worked with the Vice President of Finance and Facilities and the Insurance Committee to research and analyze the benefits of health savings accounts and health reimbursement accounts. Due to the lack of time, the decision was made not to implement HAS's or HRA's at this time. The University is changing from a fully insured medical insurance plan to a self-insured medical insurance plan.

Assist in the expansion of the current University wellness effort.

Various wellness options have been researched and analyzed. This work will be shared with the Chair of the Wellness Committee in the near future.

Work with benefit providers to implement online enrollment forms.

Online forms have been investigated for the University retirement vendors and insurance vendors. The decision has been made to begin offering the online enrollment forms as an option but not as a requirement to new employees.

2009-2010 ACCOMPLISHMENTS

Finance & Facilities Facilities Management

Administration

- 1) *In accordance with the Governor's Energy Efficiency Initiative, Facilities Management submitted a request and cost estimate for EDNET to be installed in the Facilities Management Administration Conference room for online meetings - to promote campus-wide transportation efficiency measures, which may include teleconferencing, ride-sharing, and carpooling when feasible. (On-line meetings are becoming more common since budget cuts have eliminated a majority of business trips.)*
- 2) *SUU participated in an asbestos case for over a decade and recently received a settlement check in the amount of \$131,430.00.*
- 3) *Submitted federal grant documentation and received grant funding in the amount of \$377,190 for the SUU Science Center Addition from the Department of Health and Human Services Health Resources and Services Administration (HRSA).*
- 4) *Submitted federal grant documentation for an appropriation of \$972,000 from the Department of Energy for use in making the SUU Science Center Addition a model of energy efficiency.*

Business Operations

- 1) *Julie Larmore, Manager of Business Operations for Facilities Management, received her MBA in May 2010.*
- 2) *Promoted improved customer service throughout Facilities Management by adding customer service training to monthly staff/safety meetings.*
- 3) *Implemented the process for updating the state system for utility tracking EPA portfolio manager to provide this information on the Facilities Management web site.*
- 4) *Updated the Facilities Management website with a new look and user-friendly navigating.*

Utilities Services

- 1) *Increased the accuracy of utility meter readings by retrofitting or replacing meters that are not compatible with the current automated meter reading system (AMR). Replaced 14 of 60 meters that were not AMR compatible. Gas meters are currently in the process of being purchased. Installation began this spring.*

- 2) *Refined chemical water treatment on campus to create a steady state of protection by the implementation of chemical feed systems, summer internal evaluations, and evaluation of the existing water treatment contract for shortcomings, using industry best practices. Specific improvements were the addition of three sacrificial coupon stations on campus for corrosion monitoring.*
- 3) *Tunnel safety improvement - Implemented the design to install eight (8) emergency call boxes at strategic locations in the tunnel system that will allow communication with the Call Center in the event of a tunnel emergency. Emergency phones have been installed and are on a cycle to be tested monthly. Phones are a push-to-talk style communicator that contacts the Call Center when activated. Each call station has a light so it can be found in low visibility conditions.*
- 4) *Continued a strong emphasis on energy conservation with particular attention to the elimination of incandescent lighting on campus by not replacing any incandescent lamps, but instead using compact fluorescent lamps (CFLs) in their place. Five hundred (500) additional CFLs were installed in several buildings across campus. Additional lighting solutions are currently being created for outdoor wall packs, walkway lights, interior lighting at Science, interior lighting at the Heat Plant, and interior lighting at Technology. Other conservation projects underway include replacement of electric condensate pumps with non-electric steam driven style, and steam piping insulation repair in various locations.*
- 5) *Developed a performance contract for an energy services company (ESCO) and selected Chevron Energy Solutions Company to improve energy efficiency across campus.*

Grounds and Gardens

- 1) *Documented shrubs on campus to establish an interactive web-based community resource for drought resistant plants to be added to the Campus Tree Tour currently on the website.*
- 2) *Landscaped the newly constructed Facilities Management Building and maintained high campus standards with limited resources.*
- 3) *Changed Student Worker format to be more efficient. Summer: Each staff member has at least one student assigned. For larger projects we have four multi-task students available. Winter: Staff members prioritize their projects and post them so students can check the list for projects to work on. The full time person's name is on the project so they know who to check with on how the project should be done. These changes are working well and have created more productivity from our student workers.*

Building Maintenance, Repairs and Project Administration

- 1) *Implemented a monthly Facilities Management employee education program on job-related skills and new trade practices including: concrete practices, and code training, as well as basic computer classes to improve computer literacy within the shop.*
- 2) *Worked on implementing a security proprietary key system in the Library and General Classroom - in the process of getting bids on cylinders.*
- 3) *Upgraded estimating practices. Created a standard system with intuitive forms available for administrative decisions. Created an estimating worksheet for consistency to best serve our needs.*
- 4) *Hired three Construction Management Student Interns to assist with "real-world" project administration that lets them earn college credit.*

Custodial Services

- 1) *Worked on a faculty/staff satisfaction survey to assure staff are meeting our customers' needs. The survey will give us valuable information on how we are perceived by our customers and then give us the ability to strive for improvement in targeted areas.*
- 2) *Manager, Custodial Services will strive to achieve the APPA credential of CEFP (Certified Educational Facilities Professional.) The first step is to pass the EFP (Educational Facilities Professional) examination. He has applied and received acceptance to take the EFP exam, and has purchased the necessary study materials.*
- 3) *Green Cleaning: Transitioned to Spartan line of environmentally-friendly cleaning products and expanded products into additional buildings.*

Space Planning, Risk and Project Administration

- 1) *Researched the State of Utah's High Performance Building Rating System (HPBRS) and the U.S. Green Building Council's Leadership in Energy and Environmental Design (LEED) standards and certification for building, and the differences between the two.*
- 2) *Researched Building Information Modeling (BIM) and how it will be used for building projects on campus. Attended an on-campus BIM (Revit) Training.*
- 3) *Completed Cedar Hall – Phase II Housing Project.*
- 4) *Received an energy rebate check from Rocky Mountain Power in the amount of \$18,494.00 for Phase II of the Housing Project (Cedar Halls).*
- 5) *Completed new Science Center Design and contractor selection. Project construction is in progress.*

- 6) *Updated Office Inventory for entire campus.*
- 7) *Updated and submitted CFI data. (One of two schools to submit on time.)*
- 8) *Through participation in the Risk Management incentive programs, the University received the maximum premium reduction available for Liability and Property insurance (15%).*
- 9) *Received Sprinkler Test Rebate Check by participating in the Wet Systems Fire Inspection program. The University received a check in excess of \$12,000 with the money to be used for Fire Systems maintenance or improvements.*

Motor Pool & Receiving

- 1) *In conjunction with Regional Services and other outdoor programs, developed a protocol for renting 4-wheel drive vehicles through Enterprise Rent-A-Car. This protocol is to record information including: the individual and department requesting the vehicle, the number of vehicles requested, the location and type of travel, the dates and times of the trip, and the actual cost of the trip. As of the end of the school year, we had three requests for 4-wheel drive vehicles.*
- 2) *Worked with various campus departments to remove older, higher-mileage vehicles from Facilities Management. Still working on Automotive Technology and Utah Shakespearean Festival.*
- 3) *Coordinated with officials at the State and campus level to get driver training materials as a web-based course on-line for the convenience of users and for fuel savings and emissions reduction since staff aren't required to drive to Motor Pool to take the test now.*
- 4) *Added three (3) new Toyota Prius Sedans to the Motor Pool Fleet for energy efficiency and reduced emissions.*
- 5) *Motor Pool's efficiency efforts recognized by officials with the State of Utah Division of Fleet Operations.*
- 6) *Upgraded electronic scanner for receipt and delivery of packages.*

2009-2010 ACCOMPLISHMENTS

Finance & Facilities Purchasing/Post Office

The objective of the Purchasing Office is to focus on internal processes and other systems through fiscal year 2010 that directly support the campus, its employees, and the community. To achieve this, all departmental personnel shall direct significant efforts to improve efficiencies in response times to requests, improve order tracking, monitor delays with on-line requisition processes, and develop a method to determine the overall effectiveness of the Purchasing Office to the University. The goal of this effort is to ultimately improve the effectiveness of the purchasing operation by a measurable level. This effort will be directed, though not limited to, at the following activities:

Note - For the past year, the Purchasing Office actively worked toward accomplishing its stated goals. As contrasted to previous years where the objectives could be benchmarked and evaluated, these goals set were focused on customer service and the efficiency of the departmental processes. Whereas past goals dealt with developing new operations or enhancing its activities, this year, tools were developed to track and evaluate the length of time documents were in process within the department.

PURCHASING

- 1) The length of time involved to process both paper purchase and on-line requisitions through the purchasing process. Each paper requisition shall be time stamped when received to Purchasing and again when the purchase order is released to the vendor. For on-line requisitions, an electronic report will be generated which will reflect the actual processing time. These times will be logged into a file and periodically evaluated for improvement.

The majority of purchase requisitions submitted to the Purchasing Office are done so electronically. The "paper" requisitions submitted were so few as to be excluded within this study. The electronic requisitions submitted, which numbered greater than 2,300 through the end of May, can be, due to their very nature, electronically tracked. A report was developed by Purchasing Office staff which indicated when the requisition was input in to Banner, its progress through the end-user's departmental approval processes, its actual submittal time and date to the Purchasing Office, and ultimately, its release as a purchase order. The report was effective in showing the average length of time each of these steps were taking. A useful tool however variables began to appear that significantly altered the data. First was simply the weekend; the report couldn't accommodate a five-day work week. Approvals or submittals made on Friday or near the end of the week would automatically have an additional 48 hours or more added to the process time (if the approval was made the following Monday). There was apparently no fix to this problem so all adjustments had to be made manually. The second variable was the time added due to waiting for the end-user to provide required data to accompany a requisition. Bid information, specifications, vendor addresses all provided by the end-user greatly lengthened the process time of requisitions if this information was not made readily available. These two variables made identifying the "average" processing time difficult. With these two considerations however, the report was still valuable in reflecting and gauging our efficiencies.

- 2) Specific requests for adjustments to purchasing cards shall be tracked and logged into a file with the intent to improve the processing time required to make those changes.

As indicated, the objective here was to track the response time to Purchasing Card requests for adjustments. As part of the administrative function, the purchasing card coordinators respond to requests to adjust limits and other issues. This is a critical element of the administrative process and ensures an effective and reliable purchasing card program. The coordinators were tasked at the beginning of the year to enhance their response time. A report was generated which cataloged when a request was received and opened (via an e-mail) and when the change was made (as per the bank's Access On-line system). There was a marked improvement throughout the year to the time taken to conduct this action which is now just a matter of minutes. This has greatly benefitted the reliability of the program.

- 3) Reporting capabilities are still insufficient to accurately track orders once they've been issued to a vendor. Efforts will be conducted to improve this function which will then allow the ability to track the amount of lead time for each order. From this, we can use this data to improve the amount of time an order takes to get to the campus from the vendor.

The personnel assigned the reporting responsibility for the department spent considerable time with Information Technology to adjust this report for accuracy. Currently, due to those efforts, accurate information is now obtainable on outstanding orders. Especially at the end of the fiscal year end, it is imperative that purchase orders that are still outstanding, either completely or partially, be identified to ensure delivery prior to the end of the year. This report is greatly helping this issue.

- 4) A method shall be developed that will evaluate the effectiveness of the Purchasing Office as it relates to its mission to support the campus. Using the preceding data as well as other measurable criteria, a gauge will be implemented and measured monthly to assess improvement. Each employee shall be involved in this development and have share of the responsibility. The outcome is to recognize a significant increase in the level of support given to the campus.

This goal was not achieved though it will be a priority and continued to be worked toward in fiscal year 2011. Departmental effectiveness and efficiency is essential to provide outstanding support to the campus and the criteria mentioned within this goal will be critical.

POST OFFICE

Progress Report of Goals 2009-2010

- 1) Compare our service fee structure for services with other Colleges and Universities.

Thanks to the work we have done over the years, our operation is competitive and continues to see growth opportunities. We have continued to monitor other peer groups and others in the industry and feel we are right on track with other Colleges and Universities. We have made great strides to implement competitive pricing on the items/services we have within our control.

- 2) Post Monthly/Weekly stats for all employees to see how well we are doing.

We have found by communicating our “stats” to employees as they are working or as they want to know is more successful then posting “stats” somewhere that might not be seen or understood. We try to update the staff as much as possible by email, person-to-person, or by posting notes around the office. This has saved printing and added labor cost.

- 3) Write newsletter and post to the website at least twice a year.

In 2009 we had 4 newsletters and will continue to post content in our newsletters as time permits and as information requires.

Other Items of Interest

1. Successfully supported State Bank of Southern Utah with their pre-sort 1st class mail which in return helped and increased our volume as well as captured added revenue.
2. Continue to look for opportunities to increase business. We are not actively looking outside of campus but have had companies call because they have heard we can do the job and have developed a reputation.
3. Our department is assuming responsibility for Lost and Found for the campus.
4. Planned, taught, and organized a Mail 101 class for faculty and staff to educate them about services and products.
5. Continue to serve as President for the SUU Iron County Alumni Chapter, Sigma Nu campus advisor, President-Elect SUU Staff Association, USG Swimming Coordinator, Financial Aid Scholarship Appeals Committee, help Dr. Lunt with special projects, and serve as a member of the Parks and Recreation Advisory Board for Cedar City.

2009-2010 ACCOMPLISHMENTS

Finance & Facilities

Internal Auditing

1) Creation of an Internal Control Catalog

A fundamental responsibility of Internal Audit is to ensure an adequate system of internal controls. While many internal controls existed prior to this exercise, I was able to document and test the University's key control. This process allows for an annual check-up of our control compliance and gives University Administration, the Board of Trustees, and the Board of Regents reasonable assurance that SUU does in fact have an adequate system of internal controls.

2) Enhanced my personal knowledge regarding Higher Education operations

Through formal training, Regents' meetings, and independent study, I've been able to considerably strengthen my own knowledge of the operations of SUU and the higher education industry. This business knowledge is vital to any successful audit, and as I continue to increase my higher education knowledge, internal audit at SUU will continue to become more productive.

3) Completed first half of 2010 Audit Plan

At the beginning of the calendar year, a rather aggressive audit plan was approved by the Board of Trustees. Thus far, I have been able to stay on track with the audit plan. Scheduling changes have been made where necessary, but generally speaking, roughly half of the work set forth on the audit plan has been completed.

4) Individual Professional Development

Through webinars and discussion groups made possible through the Association of College and University Auditors, I have continued my own professional development as an auditor. Most notably, I accepted the request that I serve as an Associate Editor for "College and University Auditor", the professional