

## FY17 Business and Financial Affairs Budget Submission RESPONSES TO SUPPLEMENTAL QUESTIONS

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*Note: The following information provides a high-level overview of the division’s budget submission for FY17, including strategic initiatives and new base funding requests. For brevity, contextual details and strategic goals are not included in the summaries, but rather provided in the Division’s FY16 Work Plan available in our Annual Report.*

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### I. Strategic Planning and Reporting

The overview of the division’s current strategic goals and objectives follows below and includes a summary of divisional activities, goals and initiatives. We actively facilitate the strategic goals and plans of CI through the alignment of our divisional strategic plan with the University’s current and future Strategic Initiatives.

**Organizational Structure:** The Division of Business & Financial Affairs (BFA) is comprised of nine units and four core programs, plus auxiliaries, which support the University by providing essential services. The organization structure includes Financial Services; Budget & Planning; Human Resources; Facilities Services; Public Safety; Title IX and Inclusion, Internal Audit, Administrative Services and the Vice President’s office. Additionally, BFA is responsible for Environmental Health & Safety and Risk Management.

**Role:** As CI continues to grow, the division has continuously anticipated University needs and has mobilized operations to increase capacity in support of this expansion. Near-term planning recognizes that our current student population has reached approximately 5,589 FTES, with long-term planning for 15,000 FTES at full build-out. Current plans use an enrollment growth assumption of 2-3% per year over the long-term, but we will see no funded enrollment growth for 2017-18. BFA strategic priorities focus on putting systems and structures in place to support the next phase of growth and organizational maturity.

**Our Approach: Transformation**

The funding and anticipated campus growth challenges we face have required a shift in the way business is conducted. In addition to incremental but essential improvements in our operations, transformational changes to our unit and program leadership and business strategies will help us to serve our current student population and beyond. We continue to challenge and reconceive our programs and services, putting systems in place while intentionally challenging ourselves as leaders. We are also empowering staff members of the BFA by equipping them with the skills and knowledge needed to fully participate in planning, implementation, assessment, and improvement processes.

**Our Approach: Collaboration**

As we continue to build programs, create structures and processes, and provide next level services, we are deliberately invested in building relationships amongst the BFA units, with other campus units, and with our

community partners. These investments are resulting in the formation of partnerships, Lean improvements and cost savings, as well as less tangible assets like strengthened trust, goodwill, and capacity for more effective change and further innovation.

### **BFA Mission, Vision, and Values**

**Mission:** The Division of Business and Financial Affairs' component units and programs support CI's academic mission by transforming the delivery of services through continuous improvement.

**Vision:** We are the recognized leader for delivery of outstanding services.

**Values:** Teamwork, Diversity, Integrity, Respect, Excellence, Collaboration

**Goals:** The divisional strategy map reflects the primary strategic goals of the division, collaboratively identified and compiled by the leadership of the individual units (Attachment I).

### **Overview of Units**

1. **Vice President's office** – The Vice President's office is responsible for BFA strategy and leadership as well as the overall planning and management of the campus. Its members include the Vice President, the Director of Special Projects, the Director of Strategic Operations, Special Assistant to the VP, and the Risk Manager.
2. **Budget & Planning** – This unit administers the budgetary program for CI, working in collaboration with campus leadership and divisional contacts, and provides consultative service to University administrators. It includes oversight of the operating budget, capital and resource planning, forecasting, and debt management.
3. **Financial Services** - The unit includes Fiscal Services and Student Business Services (SBS). Combined, these units are responsible for ensuring that all accounting, reporting, and reconciliation functions are performed in accordance with applicable law and policy, while also providing the highest possible level of service to CI students and the larger campus community. The unit also maintains a liaison relationship with the Chancellor's Office for reporting and compliance matters.
4. **Human Resources** – This area is responsible for the full complement of human resource services for the campus including recruitment and employment processing, benefits administration, compensation and classification, professional training and development, equity and diversity, employee relations, HR information systems, and payroll. The unit maintains a liaison relationship with the Chancellor's Office for reporting and compliance matters.
5. **Facilities Services** – This area is responsible for planning, designing, and constructing new buildings and renovations, maintaining buildings and landscaping, providing custodial services, managing utilities, as they provide support services to the campus. These areas also maintain a liaison relationship with the Chancellor's Office for the coordination of capital projects along with reporting and compliance matters.
6. **Public Safety** – The unit is responsible for the safety and security of the campus environment as well as management of campus transportation and parking. The unit is comprised of Police Services; Transportation and Parking Services; and the Environmental, Health & Safety program.
7. **Internal Audit** – The office assists the university in the effective discharge of their fiduciary and administrative responsibilities by bringing a systematic, disciplined approach to evaluate and improve the effectiveness of risk management, control, and governance processes provided through a series of independent and objective operational and compliance audits, internal control reviews, investigations, and advisory services designed to add value and improve operations.
8. **Title IX and Inclusion** - The unit is responsible for developing and managing campus-wide diversity and equity initiatives, including the University's Title IX program, to support CI's mission, goals, and objectives, in

accordance with all applicable federal and state non-discrimination requirements and laws and serves as the University's liaison within these areas with students, staff, faculty, members of the public, and governmental civil rights enforcement agencies. Through its cross-divisional collaborations, the unit promotes diversity and creates and fosters an open and inclusive campus environment.

- Administrative Services** - is responsible for the east campus including property management of for-sale properties. The unit also oversees Procurement & Logistical Services, and University Auxiliary Services which provides retail food services, residential dining, vending, and catering. Administrative Services also provides oversight of the CI Power Plant.

### Divisional Key Initiatives for FY 2016-17

The division's strategic plan closely aligns with the campus-wide strategic priorities, particularly under the heading of Realize our Future. The activities within the BFA office are implicitly reflective of the campus' strategic goals, and this year BFA continues to focus on recognizing and appreciating how we connect what we do every day to further the CI mission to support our students, while engaging in activities that support the division's strategic goals. To that end, everyone in BFA considers the following question: "How does what I do make this a better place for CI students to learn and develop?"

This message expresses the spirit and purpose of not only the campus strategic priorities, but also our division's, as we carry out our individual responsibilities to fulfill CI's mission. This message is a daily reminder to serve our students to the best of our ability by developing good solutions, thinking creatively, and working collaboratively.

In preparation of the development of BFA's work plan for the 2016-17 fiscal year, the division's leadership team participated in a planning session in June to identify goals for the upcoming year that align with the BFA strategy map (see Attachment 1). The context for the work was focused on the institution's growth, identifying activities to ensure that resources are allocated as efficiently as possible, while at the same time maintaining the highest level of customer service. For the BFA, this will mean a continued intentional focus on developing more effective business processes and taking deliberate, calculated risks on new ones, while keeping a keen eye on connecting our work with making CI a better place for students to learn and develop.

**Campus-wide strategic resource planning:** We will continue to engage in those activities that increase transparency and encourage accountability.

**Capital expansion:** The division will continue its work on CI 2025, the major capital expansion strategy that will support the next decade of growth. In collaboration with Jones, Lang, LaSalle as developer advisor, we will move forward with the transactions that were set in motion last year, including the sale and development of the 32 acre 2A/2B land.

#### Lean Six Sigma:

**Purpose:** The Organizational Effectiveness (OE) program supports the division's efforts in meeting its goals and objectives through strengthening the continuous improvement activities on campus. Services are offered that support learning and development, strategic planning, and project facilitation. Leadership coaching and change management is also provided.



*Strategy:* OE will continue to expand its service offerings to other areas of the campus as interest in the program develops. The desired outcome is to exemplify exceptional communication and collaboration, and to influence the campus to embrace a culture of planning, assessment, improvement, and accountability, as well as to develop a capacity for change leadership and organizational competencies, as well as tangible efficiencies that will be needed as CI creates its next decade.

*Activities:* Under the program, the division will continue to collaborate with its partners at Cal Poly SLO and the County of Ventura Executive Offices on Lean initiatives. New partnerships will continue to be explored within the CI community, including faculty, and the community at large.

## 2016-17 Report on Current Activities

As a baseline operating practice, all units within the Division of Business & Financial Affairs annually review current resources to ensure that they are allocated to top needs and identify ways to continuously improve programs we administer. With the implementation of the Lean Six Sigma program in its fourth year, and exercising our due diligence, we have identified additional efficiency opportunities, first within the division and subsequently cross-divisionally, in support of the University's growth. One example of reallocation of existing resources will be the development of a shared services – or services management model of customer service delivery by combining resources currently allocated to Human Resources, Procurement, Financial Services and Budget and Planning in its initial stages. This year, we are also recruiting for a Facilities Services Plant Engineer; half of that funding will be from the Site Authority, and the other half will come from salary savings.

### Reallocation of Resources/Cost Avoidance - \$1,028,000

- **Consolidation** - Student assistants are now reporting to a single supervisor in two divisions, and this has reduced redundancy in training and workflow, which also translates to 2.0 FTE in staff salary savings, or approximately \$150,000.
- **Reallocation** - Salary savings that have been achieved through reorganization are approximated at \$500,000 in unit areas. In addition, staff overtime has been reduced by the use of Job Order Contracting (JOC) for minor capital projects, which reduces project completion time while providing a quicker response to urgent requests.
- **Restructure** - Programs have been reorganized to achieve salary and expense savings through streamlining and reallocating multiple programs. A Solution Center was established to consolidate multiple phone contact centers, including the campus main line, with an estimated annual savings of \$100,000. The Conference & Events office was streamlined to a single unit that supports the entire campus, with efficiencies in event administration achieved and net revenues increasing by more than \$200,000. Other programs have been combined along with streamlining their processes for an annual savings of \$45,000.

### Energy Efficiencies - \$115,000

- **Consumption** - Reduced total energy consumption by 42% per FTES through the installation of LED lighting upgrades in various campus interior and exterior fixtures. HVAC conversions were completed in buildings that contained the highest-use of classroom space, all for improved efficiency and comfort. These efforts generate utility savings of over \$34,000 annually. Potable water consumption has been reduced by 5% since 2013, with total water (potable and recycled) consumption reduced by 14%.

- **Capital Projects** - New capital construction projects reflect designs that exceed minimum energy performance standards and provide for more efficient performance. This translates to over \$44,000 in annual utility cost savings.

- **Waste Reduction** – Installed “smart irrigation” systems and reduced use of water for landscaping by 20%, with an annual dollar savings of \$18,000. Installed trash and recycling compactors to reduce waste volume and frequency of removal, with a savings of approximately \$10,000 annually. The process for campus key requests has been automated, which translates to a \$9,000 savings per year and a 56% reduction in waste.

BFA continues to lead CI 2025, a concept which was drafted as a framework for seeking alternative funding methods for major capital expansion for the campus, including public/private partnerships that will support campus growth over the next decade.

The Division also supports the work of the Foundation’s Finance and Investment subcommittee, and Beacon Pointe, our investment advisor, continues to advise the committee with regard to the Foundation’s Investment Policy as well as the asset allocation of the Foundation’s portfolio. Investment strategies are responsive to the current economic environment and flexible enough to respond quickly to future changes.

These activities and others remind us of how we, in the Division of Business & Financial Affairs, connect what we do every day to further the CI mission. To acknowledge the good work of our staff, a Rewards and Recognition team was convened in appreciation of staff members who exemplify how their work makes CI a better place for students to learn and develop:

#### **Organizational Effectiveness Program (OE)**

- To date, there have been over 400 CI employees, including senior leadership, have received various levels of Lean Six Sigma training, with more than \$1 million in cumulative operational efficiencies.
- The Administrative Efficiencies Committee, formerly known as the Operations Work Group, has been re-established to strengthen face-to-face communications with senior leaders throughout campus.
- Participate in the development of a service management organization;
- Provide leadership in the implementation of DocuSign;
- Document processes by using the Administrative Detail format.
- Provide leadership in the development of the Divisional webpages.

#### **Special Projects**

- The Strategic Risk Management program continues to develop with an emphasis placed on communication.
- The records retention program’s business practice has been documented.
- The Park Advisory Group continues to guide park management and operations.
- Provide program information to stakeholders for the multi-functional device (MFD/copier) program;
- Facilitate risk assessments for existing and emerging programs as we continue developing the Strategic Risk Management Program (SRM);
- Engage cross-divisional dialog to solicit information and ideas when developing programs and projects, such as the CI Park Master Plan, the CI Boating Center, and educational opportunities.

#### **Financial Services**

- Enhance training for campus community on financial management, data warehouse reporting, and day-to-day operations;
- Implement Student Financial Literacy Program;
- Enhance Student Orientation presentations and materials from Student Business Services;
- Create/review/update operations manuals for the department.
- Continue development and implementation of self-service solutions for both employees and students.

### **Budget and Planning**

- Continues to improve communication with regards to campus budget, and is working with a multi-year budget plan and creating a new budget model.
- Implemented DocuSign with the Hyperion Access form, Chart field request form and soon will implement the Position Management Form. These online forms will now be signed through a workflow process and the end user can see exactly where the form is in the process.
- Moved Hyperion Budget & Planning to the cloud, implemented within B&P Position Management and forecasting model.
- Launching OpenGov Dashboard for reporting purposes.

### **Human Resources (HR)**

- Utilizing data provided by the consultants in preparation for a shared services model, HR is implementing the first phase of recommendations to meet the future needs of the campus.
- Utilize DocuSign to streamline employee requisition process;
- Implemented direct deposit for student employees as well as a simplified change of address process.
- Professional Development has increased its offerings and has provided robust training to all areas of the campus.

### **Facilities Services**

- Completed a restructuring that resulted in the establishment of a swing shift that supports the campus' needs through the end of the academic day. This restructuring resulted in a savings of approximately \$250,000 annually.
- A three-to-five year strategic space planning review is being planned.
- Through the on-going activities of the Grounds Dept., CI has received the designation of "tree Campus USA for the fourth year in a row.
- Facilities Services has participated with engineering, sustainability, and biology programs and these efforts and other sustainability-focused activities have resulted in CI being named a STARS Gold Institution by the Association for the Advancement of Sustainability in Higher Education.
- Student Capstone projects involve students with some of the sustainability and energy savings projects, such as water conservation and waste reduction.

### **Public Safety**

- The Police Department increased crime prevention/education programs by 15% over the previous FY.
- Department personnel completed one (1) lean project related to lost and found property management and recovered .25 FTE of personnel capacity within the dispatcher and ASC classifications.
- Revision of the Field Training Program Manual for Police Officers in full compliance with State regulations.
- The Parking & Transportation increased ZipCar membership by 10% and usage increased by 5%.
- Recovered capacity in the ASC classification – a result of the lost and found property management lean project – has been assigned to supporting outreach efforts related to improving ride share services on campus.
- Environmental Health & Safety (EH&S) successfully lead to implementation of LMS to track regulatory of Facilities Services employees. Increased by 10% the number of safety and environmental compliance inspections.
- EH&S also delivered online Illness and Injury Prevention Program (IIPP) training for all employees. This implementation will support the goal of 100% participation.

### **Internal Audit**

- The Internal Audit division is developing an internal service for the campus which will include reoccurring compliance audits as well as program audits. Anticipated start in mid-March 2017.
- Began providing review of policies and new program written procedures/processes campus-wide; to date, has provided recommendations on 9 policies/programs.
- Provided informational presentations to staff and faculty regarding the internal audit office and advisory services available.
- Acts as a liaison between the campus and external auditors. Has provided oversight over four audits since September 2016, three completed audits and representing approximately 40 corrective actions.

### **Title IX Inclusion**

- Title IX & Inclusion (T9&I) re-established two University-wide workgroups, the University Accessibility Committee and the Multidisciplinary Workgroup on Eradicating Sexual Violence to create more robust and efficient structures for assessment of issues of accessibility, safety and campus culture in these areas.
- Revisions continue on the unit's websites to provide increased access to make reports of concern regarding bias and harassment—online reporting forms are now available.
- Created flowcharts that now summarize processes to describe complex resolution procedures for anti-DHR policies and protocols so end-users better understand options for support from CI.
- Continues to partner closely with Student Affairs to pool resources and/or serve in an advisory capacity on student programming related to inclusivity and social identity.
- With DSA, founded the Beyond the Rhetoric event series to establish common branding for related events across divisions.
- Began using the Maxient system in efforts to move to electronic record keeping wherever possible and appropriate and to increase the efficiency of information sharing between Student Conduct, Housing, University Police, and the CARE team.
- Office has continued to see a steady increase in volume of bias incidents reported across the University (the percentages vary depending on the population served, but current numbers indicate roughly a 200% increase since the unit's inception in 2015).
- T9&I will hire a new manager that will assume major investigation duties this spring, in addition to delegating substantial investigation responsibilities to the soon-to-be-hired HR Manager for Employee Relations.
- This spring, T9&I will execute the first true campus-wide climate survey, which will include common core inquiries that will be posed to students, faculty and staff.

### **Administrative Services**

- Completed the transaction for the 328 apartment and Town Center sale;
- Participate in oversight of the 32 acre development project;
- Continue oversight of the for-sale housing program and the transition of rental townhomes to for-sale properties; and supports the work of CI 2025 and the Site Authority;
- Hired a Director of Procurement and Logistical Services, a Contracts Specialist, and a Director of Conference & Events; then transitioned Conferences and Events to University Advancement;
- Develop a process to oversee all contracts generated by the University.

## Goal Highlights for 2017-18 Fiscal Year

### **Organizational Effectiveness Program**

- Participate with the CI 2025 Team;
- Continue partnerships with County of Ventura (Lean Six Sigma); Academic Affairs; Students Affairs, and ISLAS Academy, and explore additional opportunities for expansion of the program;
- Facilitate Lean Six Sigma projects and trainings;
- Convene Administrative Efficiencies Committee.

### **Special Projects**

- Facilitate risk assessment for existing programs (Strategic Risk Management);
- Provide risk management services (site inspections, risk consulting/program review, instruction);
- Document processes, i.e., subpoena handling, Public Records Act responses, contract renewal, etc.;
- Subpoena and Public Records Request information to be posted;
- Develop a program to update timelines and release information for CI Park activities.

### **Financial Services**

- Implement final phase of CashNet;
- Translate SBS forms into Spanish;
- Expand paperless processing and electronic signatures;
- Implement CSU chargeback modules and review implementation of Common Financial Systems modules;
- Offer CI 101 training sessions, new employee orientations, and engage in cross training;
- Standardize work and develop a succession plans for all positions and activities;
- Create video tutorials for using MyCI.

### **Budget and Planning**

- Implement an e travel solution for campus;
- Implement Team Dynamix to track tickets and/or questions that are expected to come through the service management area of Business and Financial Affairs;
- Work with campus constituents to create a new Budget Model for CI;
- Launch Labor Cost Distribution Dashboard for payroll reporting.

### **Internal Audit**

- Continue to develop an internal service for the campus which will include reoccurring compliance audits as well as program audits.
- Continue review of policies and new program written procedures/processes campus-wide.
- Provide informational presentations to staff and faculty regarding the internal audit office and advisory services available.
- Continue to act as a liaison between the campus and external auditors.

### **Title IX Inclusion**

- Review current campus climate data (Recruitment and Retention, Affirmative Action Plan) in conjunction with climate survey results to provide additional tangible, measurable short-term and long-term recommendations for campus-wide equity initiatives to executive leadership.
- Partner with VPSA and Student Affairs leadership to designate additional, well-coordinated alternatives for early resolution of equity and bias related concerns originally reported in DSA, to promote more expedient resolutions for students where appropriate.



- Move to a fully electronic record keeping practice by end of FY 17-18.
- Utilize Maxient data to assess division of investigative assignments for FY 15-16 and 16-17 and establish specific timeline of completion goals for all matters reported into office.
- Utilize Maxient reminder and automated letters template system to shore up timelines more effectively.
- Expand unconscious bias awareness recruitment training with Faculty Affairs and HR to all employees who serve on search committees.

### **Human Resources**

- Establish a Knowledge base system in support of a shared services model;
- Implement a tracking system for incoming inquiries;
- Create service level (partnership) agreements with campus stakeholders;
- Implement talent management program to guide sourcing, retention, and development programs;
- Expand Professional Development to link to overall talent management program;
- Expand focus on recruitment services.

### **Facilities Services**

- Based on the success of the establishment of the swing shift staffing, set up a night shift staff that provides increased support as the campus becomes a more 24/7 university, anticipating our growth, while looking to achieve greater operation efficiencies;
- Conduct a customer service survey in fall, 2017; utilize APPA standard survey and review results with campus departments and FS Staff, using KPIs;
- Engage in Academic Affairs through lectures on Engineering, Sustainability and Biology and work with faculty to establish internship programs that will benefit both students and DFS;
- Through My CI and FS webpage, set up annual training calendars; create quick training videos.
- Encourage process mapping and encourage lean processes.
- Deliver capital projects on time and on budget while increasing/improving overall project value;
- Expand paperless project management system;
- Continue implementation of BIM on campus buildings;
- Expand Facilities Link as a support for FS staff and the broader campus community.

### **Public Safety**

- Help the community better prepare for disasters by improving participation rates in CI and VC Alert.
- Increase the number of program delivered that focus on employee and student safety training compliance.
- Track trends in environmental health and safety inspection and assessment trends.
- Benchmark crime offenses per 1000 students against benchmark CSU institutions.
- Seek to arrive at all emergency scenes within 5 minutes or less 90% of the time.
- Maintain an average PCI parking lot index greater than 80.
- Track participation trends for VISTA, ZipCar, and registered carpools.
- Seek to reallocate personnel resources in a way that fits emerging trends.

### **Administrative Services**

- Continue to support the endeavors of CI 2025 and the Site Authority with development of 2A/2B;
- Collaborate with Extended Education to locate new space for the Thousand Oaks Center;
- Evaluate a campus-wide mail stop system; with possible development of a campus bicycle courier program;
- Implement on-line catering ordering program, and planning for a mobile food facility.

## 2. New Growth Funds Request

### A. Public Safety \$92,500

Priority I: This request is to add one FTE staff (1.0) and O&M to support the position in the environmental health and safety work group. The position will serve as the chemical hygiene and radiation safety officer, and will primarily focus on the OSHA Laboratory Standard to support faculty and students in the laboratory environment. This position will be responsible for the training on the safe use of radiation and radioactive materials as well as regulatory compliance.

### B. Title IX and Inclusion \$47,370

Priority I: At the inception of the Title IX and Inclusion office in 2015, no funding was provided to cover the cost of system-wide mandated support services for CI members who are impacted by incidents of sexual misconduct and violence. The state-required contract services are currently provided to CI under victim advocacy services provided by The Coalition for Family Harmony. Current temporary funding comes from a vacant position in the unit that will be filled in spring 2017.

### C. Facilities Services \$71,473

Priority I: Facilities Services assumed responsibilities for the ongoing maintenance of the Channel Islands Boating Center (CIBC) and the Santa Rosa Island Research Station (SRI) using temporary, one-time funding. This request provides for permanent augmentation of the budget to adequately serve and support these facilities.

## 3. Space Inventory

In an effort to use current space to its best and highest purpose, all space needs for the division can be accommodated with existing resources.

## 4. New Initiatives

All funds requested are in support of existing programs.

Attachment I – Business and Financial Affairs Strategy Map



**CI 2015-20 Strategic Priorities**

1. Facilitate Student Success
2. Provide high quality education
3. Realize our future

**Business & Financial Affairs Strategy Map 2015-20**

<b>Mission</b>	<b>Vision</b>
We transform the delivery of services through continuous improvement	We are the recognized leader for the delivery of outstanding services
Values: Teamwork • Diversity • Integrity • Respect • Excellence • Collaboration	

**Value to Our Customers**

Provide responsive service that reflects value	Help to solve complex problems	Ensure the safety of our community
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**BFA Goals**

Improve Operational Excellence	Attract and Retain a Diverse and Talented Staff	Enhance Resources	Enrich Communication
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- Improve customer service
- Prepare for growth
- Share expertise and services
- Succession planning

- Create operations manuals
- Foster entrepreneurship
- Offer robust development opportunities
- Community building

- Document processes
- Implement on-line, web-based, self-service solutions
- Streamline processes for timeliness and efficiency
- Improve reporting

- Improve websites
- Increase the variety of communication tools – FAQ's, on-line news letters, annual disclosures, collaboration tools

## Attachment 2 – Quality Improvement and Quality Principles

*Our quality definition articulates the goals we all share. This definition provides a common direction and focus, even though our individual work and customers vary. If we do not collectively know where we are going, it is hard to move in the same direction and to measure and celebrate success. To manage, we must all understand and commit to the quality standard.*

**Customer Service Focus:** Our customers constantly evaluate the work we do. Anything not adding value for a customer should be considered for change or elimination.

**Continuous Improvement:** Continuous Improvement is a constant and incremental process. It involves small steps, is a team effort, focuses on processes and is driven by people. Most improvements in an organization come from continuous improvement. Dramatic change is the reverse of continuous improvement. It involves big steps, is usually abrupt, and is most often driven by technology. Dramatic change happens infrequently and repositions the organization to a new level of performance from which continuous improvement begins again.

**Employee Engagement:** People are our greatest resource. Involving the right people in decision-making generates better solutions. Customer concerns are more quickly resolved. Critical to employee participation is education and training, teamwork, empowerment, open communication, and recognition. Benefits of the approach include higher morale and productivity, better solutions, better educated workforce, and more satisfied customers. Knowledgeable staff on process improvement teams produce changes that are more effective than management-directed outcomes.

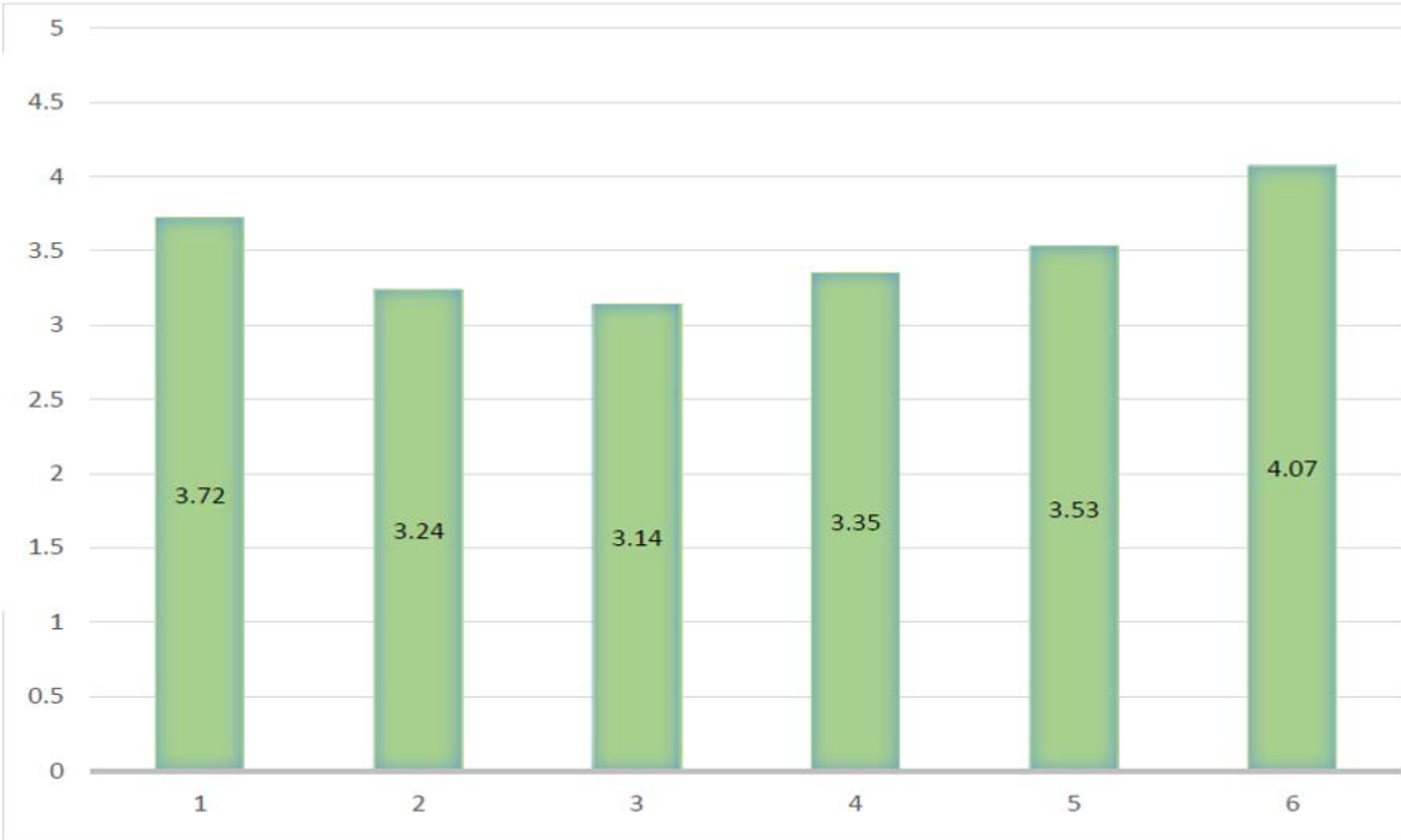
**Process Focus:** Almost everything we do is a process. A process is a group of logically related activities using resources in an organization to produce results. If you manage the process, results will follow. Most problems come from process issues. A focus on work process requires a long-term orientation, training and skills development, a supportive environment, understanding of the broader context of the job and process, and team recognition. Focusing on the end result is the opposite of work process focus and produces a short-term orientation, rules, regulations, managerial control and penalties for errors.

**Plan for Change:** It is important to anticipate and plan for change. With good planning, communication, review, and quality-improvement initiatives, most potential problems in meeting our customers' needs can be foreseen and prevented. In addition, we create a more productive, stress-free environment. Among the results sought are elimination of rework and backlogs, more accurate scheduling, shorter lead times, better use of resources, and a better office climate. Reaction is the opposite of prevention. Lack of prevention dooms us to repeating our past mistakes and engaging in never-ending fire drills.

**“Do It Right” Attitude:** If we each "do it right the first time," the customer gets better service and we will have more efficient processes. This saves time for the customer and us. When trying something new or improving a process, mistakes will happen. A “Do It Right” attitude should not stop us from trying something new. It should, however, keep us from delivering poor or incomplete service.

**Total Involvement:** To effectively manage our rapidly changing environment in positive ways, we must all be externally focused on our customers' needs. We must work in teams to solve problems and improve processes. We must communicate openly in all directions. The assumption that quality is someone else's problem is the opposite of total involvement. When employees assume that they are powerless to suggest changes and communications are kept to a minimum, a lack of trust can develop between leaders and staff. There is no sense of ownership by staff for the day-to-day problems with customer service. Quality is everybody's business, from new employee to our divisional leaders.

# Overall Performance of each Administrative Unit



Facilities Services

Financial Services

Human Resources

Administrative Services

Organizational Effectiveness/  
Special Projects/  
Risk Management

Public Safety

# CSU Channel Islands

## 2017/18 Budget Request Workbook

Please select the division

**Business & Financial Affairs**

Please select the unit/ organization/fund

**GD901 - General Operating**

Permanent Requests

211,343.00

Temporary Requests

-

Total Requests

**211,343.00**

**Fiscal Year 2017/2018 Budget Request Form**

**PERMANENT REQUEST**

Priority	Amount Requested	Full Time Equivalent	Narrative	DETAILS: Description/Classification	Specific Details	Revenue	Staffing	FTE	O&M	
1	92,500	1.00	Priority 1: This request is to add one FTE staff (1.0) and O&M to support the position in the environmental health and safety work group. The position will serve as the chemical hygiene and radiation safety officer, and will primarily focus on the OSHA Laboratory Standard to support faculty and students in the laboratory environment. This position will be responsible for the training on the safe use of radiation and radioactive materials as well as regulatory compliance.	Management (Admin 3, Admin 4, Admin 5)				-		
				Non-Represented (Admin 1, Admin 2 & Confidential)				\$ 90,000	1.00	
				Represented Staff (Non-faculty bargaining unit)					-	
				Overtime					-	
				Student Assistants					-	
				Stipends Bonuses Allowances					-	
				Librarians					-	
				Special Consultants					-	
				General Operating Expense						2,500
				Revenue 1		ex. Application fees				
				Revenue 2		ex. Other operating revenue				
				Revenue 3						
				Cost Recovery**						

Priority	Amount Requested	Full Time Equivalent	Narrative	Summary of funding category	Specific Details	Revenue	Salary	FTE	O&M	
1	47,370		Priority 1: At the inception of the Title IX and Inclusion office in 2015, no funding was provided to cover the cost of system-wide mandated support services for CI members who are impacted by incidents of sexual misconduct and violence. The state-required contract services are currently provided to CI under victim advocacy services provided by The Coalition for Family Harmony. Current temporary funding comes from a vacant position in the unit that will be filled in spring 2017.	Management (Admin 3, Admin 4, Admin 5)				-		
				Non-Represented (Admin 1, Admin 2 & Confidential)					-	
				Represented Staff (Non-faculty bargaining unit)					-	
				Overtime					-	
				Student Assistants					-	
				Stipends Bonuses Allowances					-	
				Librarians					-	
				Special Consultants					-	
				General Operating Expense		Required: Contract Services - The Coalition				47,370
				Revenue 1		ex. Application fees				
				Revenue 2		ex. Other operating revenue				
			Revenue 3							
			Cost Recovery**							

Priority	Amount Requested	Full Time Equivalent	Narrative	DETAILS: Description/Classification	Specific Details	Revenue	Staffing	FTE	O&M	
2	71,473		Priority 1: Facilities Services assumed responsibilities for the ongoing maintenance of the Channel Islands Boating Center (CIBC) and the Santa Rosa Island Research Station (SRI) using temporary, one-time funding. This request provides for permanent augmentation of the budget to adequately serve and support these facilities.	Management (Admin 3, Admin 4, Admin 5)				-		
				Non-Represented (Admin 1, Admin 2 & Confidential)					-	
				Represented Staff (Non-faculty bargaining unit)					-	
				Overtime					-	
				Student Assistants					-	
				Stipends Bonuses Allowances					-	
				Librarians					-	
				Special Consultants					-	
				General Operating Expense		Required: CIBC Maintenance and Operations				71,473
				Revenue 1		ex. Application fees				
				Revenue 2		ex. Other operating revenue				
			Revenue 3							
			Cost Recovery**							

**Grand Total 211,343 1.00**

**90,000 1.00 121,343**