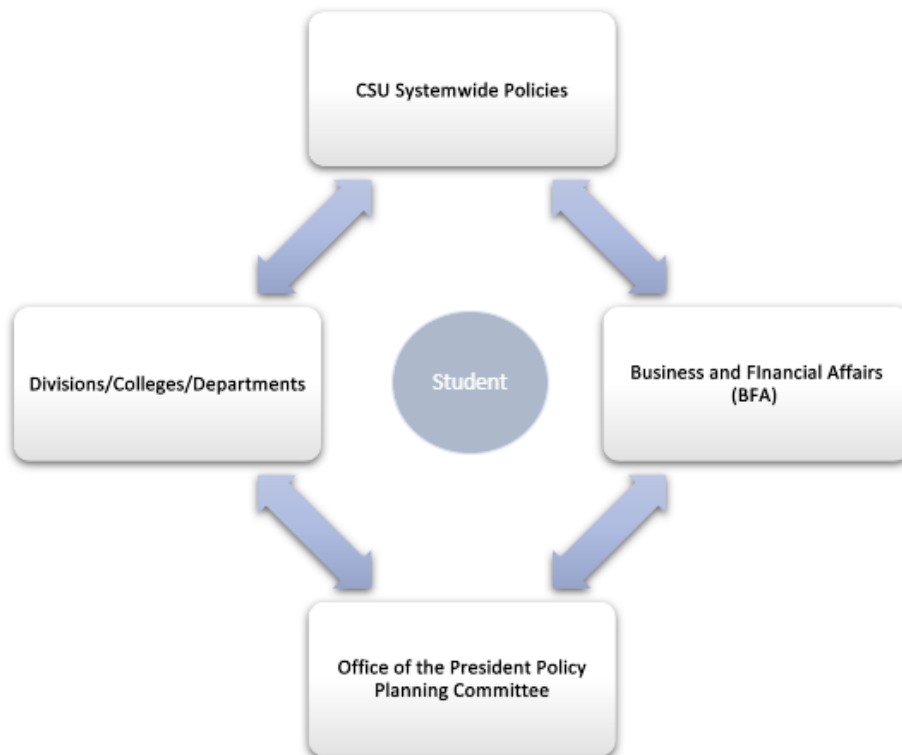


Enhancing Collaboration and Efficiency in Administrative Processes (Student Gift Cards)

To: President's Operational Effectiveness Collaborative
Team: Ryan Murphy (team leader), Jason Miller, Ariana Canales, Jennifer Conkwright, and Rosa Bravo

Overview

This executive summary addresses critical challenges in administrative processes and the role of administrative staff within the HR (Human Resources frame) framework in **student research gift cards**. Two key areas of focus include **improving the efficiency of administrative processes** across the institution and **addressing the needs and challenges faced by administrative staff in their roles**.



This chart illustrates the hierarchy structure, with CSU (California State University) Systemwide Policies at the top, followed by the Business and Financial Affairs (BFA) and the Office of the President reviewing and adopting policy. Procurement and ProCard Authorization fall under BFA. Further, below are the divisions, colleges, and areas within the institution, followed by staff support in various roles and categories within each level. The support and impact of services are towards the student body, with specific categories such as enrolled students, research participants, financial aid recipients, and the institution's employed staff.

Challenges in Administrative Processes

1. Lack of Transparency and Consistency

- The current policies and practices lack transparency, requiring administrative units to navigate through unclear processes where documentation is not available or non-existent.

2. Complex Process and Burden on Administrative Support

- Administrative processes involve multiple offices and complex forms, causing inefficiencies and delays (see table below).
- The burden of liability falls on the administrative support without proper authority to approve or reject the requests.
- The current process involves multiple offices and Adobe sign forms, causing inefficiencies.

3. Training and Expertise

- Administrative staff lack adequate training in university policies and regulations, exacerbating challenges performing their duties and service the needs of their department.

CSUCI Forms to be Completed Before Purchasing the Gift Cards

Form	Form Owner	Signatures Needed
Cash and Cash Equivalent Custodian Form	BFA	Requester (Administrative Analyst) Department Approver Stephanie Bracamontes – AVP for BFA/Controller
Gift Card/Certificate Purchase Pre-Authorization Form	BFA	Requester (Administrative Analyst) Department Approver Stephanie Bracamontes – AVP for BFA/Controller
*Requires IRB approval number** Pcard Exception Request	Procurement	Requester (Administrative Analyst) Department Approver ProCard Coordinator Director of Procurement

**IRB Application requires documented protocol for gift card procurement and distribution.

Actions Taken by POEC Team

- Documentation for the [Current Gift Card process](#) has been developed.
- Collected similar policies and procedures from other CSU (California State University) Campuses and shared in the archive [here](#).

Forward Steps: Recommendations for Improvement

1. Collaboration with Procurement ¹

- Invite Procurement to engage in a consultation to expand and elaborate on any future plans, such as the implementation of initiatives like “Tango Card.” Evaluate whether this proposed process eliminates liability applicable to Administrative Support.

2. Engagement with Financial Aid ^{1 3a}

- Extend invitations to Financial Aid for specialized consultations, specifically about 1) reporting gift cards as financial aid and 2) about the authority of Financial Aid to use professional judgment to increase students’ COA if they participate in research. Assess whether this process minimizes the impact on student’s financial aid award and what flexibility, if any, exists within the overall process.

3. Collaborating Opportunities for Administrative Support ^{1 2 3b 4}

Offer Administrative staff the opportunity to collaborate in the process, ensuring their voices are heard in reviewing and refining procedures. Evaluate the effectiveness of these collaborative spaces in improving knowledge and professional development. In addition, it will foster a sense of ownership and engagement.

- *Prioritize Ongoing Training:* Provide comprehensive and ongoing training on university policies and regulations to equip administrative staff with the necessary expertise.
- *Foster Cross-Campus Collaboration:* Establish forums and platforms for administrative analysts to connect, share insights and collaborate effectively across divisions.
- *Establish continuous team building efforts* to enrich a sense of belonging and engagement.

4. Streamlined Improvement Process ^{1 2 4}

- Advocate for development of universal “POEC form” that integrates the framework and the [4-Frame Analysis Cheat Sheet](#). This form should be accessible to all members of the campus community to identify areas for improvement and implement actionable plans.

5. Information Transparency ^{1 3b 4}

- Incorporate a dedicated section on the campus website with operational processes that can be reviewed and further developed for clarity and transparency. Step-by-step workflow library available to all staff, similar to this [page from CSUN](#). Prevent guarding of information by promoting transparency and inclusivity in decision-making processes. Cultivate a culture of openness and trust, enabling circulation of knowledge among all stakeholders.

¹ **Structural frame:** *lateral coordination across units*

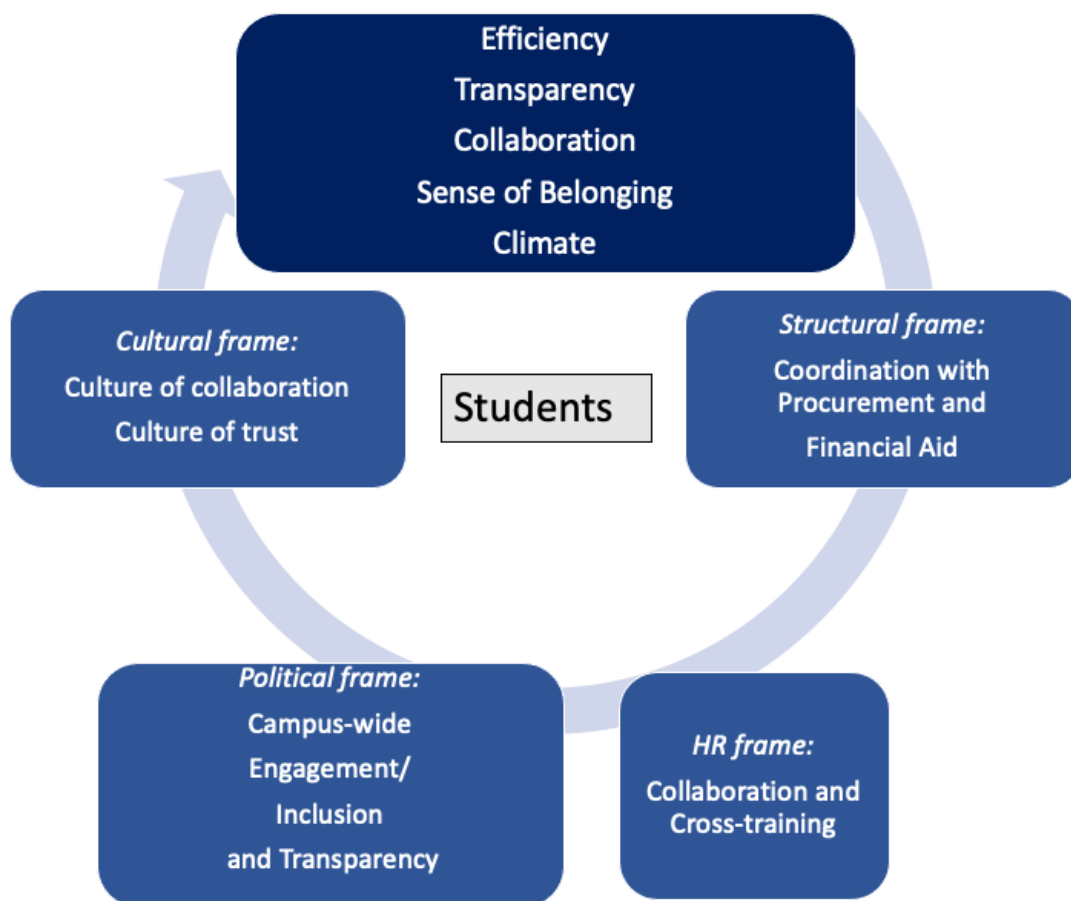
² **Human resource frame:** *collaboration and cross-training*

^{3a} **Political frame:** *resources, impact on student financial aid*

^{3b} **Political frame:** *inclusion of all stakeholder voices, transparency*

⁴ **Cultural frame:** *sense of belonging, purpose, culture of collaboration and trust toward common good*

Summary Graphic of Recommendations across Frames



Appendix

1. The team has identified critical inquiries for Financial Aid related to the workflow process in FA for students offered a gift card, along with COA adjustments and factors influencing their feasibility, Procurement questions are related to the expected launch timeline for Tango's gift card process and the expected workflow, for Human Resources/ Payroll the team formulated questions regarding the timing for requesting W-9 forms for students participating in research, along with alternatives for students without a SSN (e.g., international students, DACA, AB540 status) to participate in paid research, questions can be found here:
[Questions for Financial Aid & Procurement Consultants](#)
2. [CSUCI Gift Card Guidelines and Procedures \(DRAFT\)](#)
3. [CSUN Gift Card Process](#)
4. [Cash and Cash Equivalent Form](#)
5. [4-Frame Analysis Cheat Sheet](#)