



ANNUAL REPORT

California State University Channel Islands
Division of Business & Financial Affairs

FY 2017-18

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Message from Vice President Trinidad

Introduction and Context

The Division of Business & Financial Affairs (BFA) provides the CSUCI campus with essential services, and is comprised of six units as well as internal audit, the Site Authority, and University Auxiliary Services. With fiscal oversight of all campus auxiliaries, as well, the organization structure includes Administration, Budget & Planning, Facilities Services, Financial Services, Information Technology Services, and Public Safety.

Our Role

As CSUCI continues its growth, the Division must anticipate needs and mobilize operations to increase capacity to support this expansion. Our Division's strategic priorities focus on putting systems and structures in place to support this next major phase of growth and organizational maturity.

Our Approach: Transformation & Collaboration

Funding and the anticipated campus growth challenges us to shift the way we do business. We continue to reconceive our programs and services, empowering members of BFA by equipping them with the skills and knowledge needed to fully participate in the planning.

As we continue to build programs, create structures and refine processes, we actively collaborate amongst the BFA units, with other campus units, and with our community partners. The results of these investments are new partnerships, Lean Six Sigma improvements, and cost savings. Less tangible are strengthened trust, goodwill, and capacity for more effective change and further innovation.

There is no denying that our operating environment is very challenging, and I am proud of our hard work, planning, cooperation, and optimism. Together, we will achieve the goals and objectives of CSUCI.



Our daily call to serve:

*“How does what I do make
this a better place for CSUCI
students to learn and
develop?”*

Administration



HIRING

Human Resources managed 118 job postings and filled 71 positions on campus during FY2017-18



GOING LEAN

Organizational Effectiveness team organized Lean Six Sigma training resulting in 31 new Green Belts on campus



FEEDING

Dining Services completed an estimated \$7.6 million in sales in FY2017-18



Getting Smarter at Work

The Professional Development team provided 36 workshops attended by a total of 512 participants, saving the University approximately \$20,000 in training costs.



Dolphin Food Pantry

Improving Processes in Title IX

The Title IX & Inclusion team improved operations through a number of process improvements in FY2017-18. The team created standardized email templates with links to scheduling software, relevant Executive Orders and campus resources. For all investigations, the Title IX and Inclusion team created two new templates: (1) a standard “Notice of Investigation” sent to all complainants and respondents, and (2) a template for witness meeting requests. These new templates and standardized communications will help ensure all parties to a complaint receive consistent and thorough information and that due process is followed.

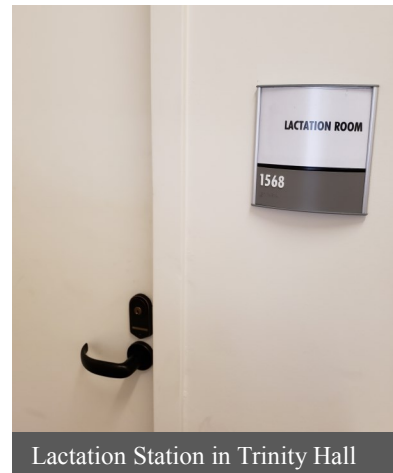
The Title IX & Inclusion team also established a repository for tracking cases. The prior system had a limited interface, requiring multiple reports in order to get a view of all cases. With the new process, cases are tracked based on their progress and this ensures Title IX & Inclusion team members can be informed about all cases, not just those to which they are assigned.

New Basic Needs Program

CSUCI took a big step toward meeting students’ basic needs, which are crucial to their academic success. Using \$40,000 in grant money awarded through the Chancellor’s Office for support of its basic needs initiatives, University Auxiliary Services helped by implementing the Hot Meals Program and the Dolphin Pantry, which were designed to alleviate hunger and provide basic nutrition within our student community.

Guide for Pregnant and Breastfeeding Parents

Title IX & Inclusion finalized a new guide for employees, students and guests who are pregnant and/or breastfeeding. The guide is available on the [Title IX website](#), which also contains an overview of campus lactation stations. The Title IX & Inclusion team further worked with campus partners to ensure that the campus map, available online, contains indicators (pink baby bottles) for lactation stations.



Lactation Station in Trinity Hall

Open Communication

The Administration team took strides toward improving communication in FY2017-18 by developing five new websites, including [Employee Training](#).

Facilities Services



COLLABORATION

Engaging STEM students, supporting CAPSTONE projects, and sharing stewardship expertise



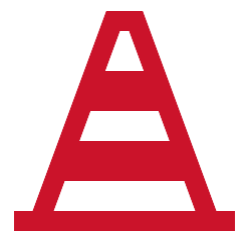
SUSTAINABILITY

CSUCI was named Tree Campus USA for its sixth consecutive year



SAFETY

\$150,000 allocated to skilled training of staff



Exceeding Industry Standards

Facilities Services exceeds preventive maintenance industry standard through allocating 91% of its funding to proactive maintenance activities.



University Drive Planter Irrigated with Recycled Water

Accomplishments

Facility Services (FS) is responsible for maintaining buildings and landscaping, providing custodial services, managing utilities, and providing support services to the campus. FS also maintains a liaison relationship with the Chancellor's Office for reporting and compliance matters.

During the year, this unit was engaged in multiple sustainability activities. These included the initiation of a Green Office Program, trialing electric-powered lawn mowers, and working with students to help them develop sustainability projects.

Continued focus on energy efficiencies and conservation has resulted in 59% reduced energy consumption by students since 2008. An 8% potable water savings through ongoing water conservation has been achieved, including adjusting irrigation schedules. Also, drought-tolerant plants have replaced labor intensive vegetation, with drip irrigation installed to minimize water use.

Waste & Recycling Projects

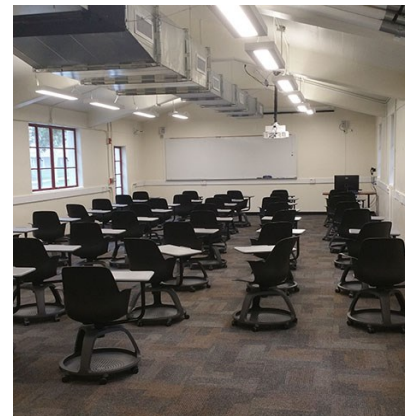
Campus waste was reduced overall by 36% since 2008, despite CSUCI's growing campus population. And, per state regulations, FS expanded its waste program to collect and compost organic waste.

With help from students, new and improved signage was created to better communicate waste material separation, and a new partnership with student organizations has begun with the intent of developing practices that minimize the University's use of plastic materials.

Other Notable Accomplishments

During the Thomas Fire, FS provided backup generator power to the campus, ensuring all systems were running efficiently and safely. Campus fire alarm panels were upgraded with new switchgear and panel boards.

Construction of Trinity Hall and Arroyo Hall were completed, providing capacity for students and staff. Interior refreshes occurred for Bell Tower, Ojai Hall, and Academic Affairs. Additionally, upgrades to the Central Plant were completed, and the Placer Hall portico was rebuilt.



New Classroom in Trinity Hall

Running an Efficient Operation

100% of FS projects were completed on budget; 94% of projects were completed on schedule

Financial Services



E-TRAVEL

Implemented new E-Travel program (Certify) for the campus



CFS

Completed upgrade to the Common Financial System (CFS)



CHARTFIELD

Converted ChartField Request Form to electronic form, saving average of two days per form



Collaborating with Our Colleagues

Student Business Services worked closely with Student Affairs and Academic Affairs to revise the Island View Orientation (IVO) fee charge and reversal process.



Budget Presentation

Saving Money with Better Coordination

The Budget and Planning team implemented new processes in FY2017-18 for processing Position Management Action Forms, Special Pay, and Stipends. With the new processes, Budget & Planning reaches out to HR and Grants & Contracts in advance of final form processing, saving approximately 168 hours of labor hours per year, and equating to .08 FTE. With our growing University, this savings provides an opportunity to more efficiently serve our customers.

Splitting CI Records

The Financial Services (FS) team worked closely with the Information Technology Services (ITS) and Human Resources (HR) teams to facilitate the separation of information systems. This change, which originated from our software vendor and was implemented across all CSU campuses, created one system for CI's Student Information System (CI Records) and another for CI's Human Resources Information System (CI Personnel).

The work, which began in September 2017, included testing, processing adjustments and security reviews, as well as close coordination between FS, ITS and HR. This split in records systems was successfully completed on schedule, and went "live" in May 2018.

E-Travel Program

Certify, the name of the new e-travel platform, was made available to campus employees in May 2018. Training sessions were conducted, process guides were developed, and a new travel webpage was created. This new program streamlines the entire travel process, allowing employees to book travel, submit travel receipts electronically, complete expense reports, and receive reimbursement quickly.



Finance 101 Training

Sharing Know-How

The Financial Services team conducted two Finance 101 training sessions this year, expanding this service from past years.

Information Technology Services



PROJECTS

46 technology projects were completed



WEB SUPPORT

11,713 service request tickets completed



INFORMATION SECURITY

400 information security incidents addressed in FY2017-18



Information Technology Services Mission

ITS provides and supports technology and innovative solutions that enhance students' educational experience and University operations.



Lindero Hall

Many Faces of ITS

There are many activities that fall under the ITS umbrella that support campus technology needs, including infrastructure, application support and development, user services, web services, and project management.

Information security is a top priority, and ITS works closely with faculty and staff to ensure that University data and technology resources remain protected.

New Organizational Structure

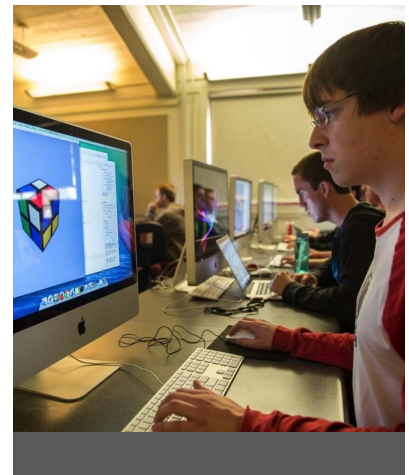
This year brought a new organizational structure for technology services, as well as a new name. Now reporting to the Division of Business & Financial Affairs (BFA), the Division of Technology & Innovation has been renamed to Information Technology Services (ITS) and has relocated to Lindero Hall 2nd Floor.

Peter Mosinskis was appointed as the Interim Assistant Vice President for ITS. The Teaching & Learning Innovations team transitioned to Academic Affairs, and continues to collaborate with ITS. University employees send and receive over 1.4 million emails per month.

Top Five Projects FY17-18

The top five projects for this year were:

- Migration to Microsoft Azure cloud services and Microsoft Office 365 email;
- Dropbox@CI implemented, replacing personal faculty and staff file shares;
- CI Fileflow, and enterprise document management system, was implemented, replacing Singularity;
- TeamDynamix, a platform for tracking service requests, replaced Track IT;
- A pilot conducted for Duo multi-factor authentication.



Spam Protection

Over 20,000 spam messages are detected and quarantined each month.

Internal Audit



PRO-ACTIVE

Continuous development of policies, procedures and controls needed in support of an expanding campus.



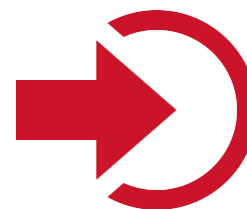
INTERNAL AUDITS

Assessing administrative risks and evaluating the controls put in place to address these risks.



EXTERNAL AUDITS

Coordinating with auditors from the Chancellor's Office, the Bureau of State Audits and other outside auditors.



Internal Audit Office Mission

Our mission is to transform the delivery of the University's internal audit services through implementation of a continuously improving audit program.



Chemistry Lab

Audit Activity

During the spring of this year, the Internal Audit office's work revolved around internal and external audits, investigations, and advisory services.

Miscellaneous work included assisting with CSUCI's Site Authority strategic planning, a Lean Six Sigma project involving student assistant separations, and reviewing MOU's for the School of Education.

External Audits FY 2017-18

The State Auditor's Office conducted a Health and Safety audit to examine the extent to which the Chancellor's Office (CO) and four CSU campuses complied with and enforced laws designed to ensure the health and safety of individuals in and around campus laboratory settings. Of the four campuses audited, CI completed inspections and flushes with the most frequency.

From this audit there were several recommendations made by the State Auditor's Office, and CSUCI responded with action plans to address these in a timely manner.

The CO audited Counseling and Psychological Services (CAPS), and concluded that the operational, administrative and financial controls for CAPS as of June 29, 2018, taken as a whole, provided reasonable assurance that risks were being managed and objectives were met.

Also conducted by the CO this fiscal year was the audit on fund-raising and gift processing. A number of recommendations were made, and the campus has responded with action plans to address them. ([CSU Audit](#))



Bell Tower East (CAPS location)

Internal Audit Reporting & Monitoring

CSUCI's Internal Audit office was designed as a resource to the campus, with a key objective to provide consulting services within the University related to internal controls, special investigations, and other areas of interest and concern.

Examples of Advisory Services

The Audit office conducts independent reviews of new policies and procedures prior to implementation, assistance with identifying/ensuring appropriate internal controls for cross-divisional processes, and assistance with establishing baselines and benchmarks.

Public Safety



POLICE

Keeping our campus safe through law enforcement, crime prevention, and community engagement



TRANSPORTATION & PARKING

Providing safe campus parking and transportation alternatives



ENVIRONMENTAL HEALTH & SAFETY

Committed to a safe and healthy environment



New Police Chief Named

In February, Acting Police Chief Mike Morris was permanently appointed to the position, replacing Chief John Reid, who accepted a position as Police Chief at Chico State University.



Members of the Public Safety Team with Ekho

Police Department

This was a year of considerable change for Public Safety (PS), including its leadership and staffing. In August, when Chief John Reid took an assignment as Chico State's Police Chief, Lieutenant Morris was assigned as Acting Police Chief. In December, when it was announced that Chief Reid would be permanently appointed as Chico's Chief, Acting Chief Morris was permanently named as CSUCI's Police Chief.

The reorganization of assignments and responsibilities was primarily in Customer Services, meeting key strategic objectives of Police and Transportation & Parking Services. Efficiencies achieved as a result of these changes provided savings which enabled the creation of a new Public Safety Officer position.

Though more changes remain on the horizon, the selection of a new permanent Lieutenant to fill the vacancy made by Chief Morris' new role will bring further stabilization to PS and a promising future.

Transportation & Parking

Recommendations contained in the Parking and Transportation Demand Study were enthusiastically implemented. Included was the formation of a Transportation Subcommittee to the Physical Master Plan Committee, two new transit programs, and a MOU with Ventura County Transportation Commission for the College Ride Pilot program, a free bus service for all college students in the County.

Additionally, Transportation & Parking improved 200 gravel parking stalls by expanding the A-3 graveled parking area, with fencing adjustments and added lighting.

Environmental Health & Safety

A successful recruitment for a new director was completed to fill the position of retired Director, Bill Kupfer. Peer Gerber began his work at CSUCI in April.

Meanwhile, Environmental Health & Safety continued to develop its comprehensive Learning Management System.

During the year, a six-month state audit was conducted focusing on CSU laboratories, and the University was praised for its outstanding lab safety practices.



Campus Bus Stop

Lean Six Sigma & PS

Two Lean Six Sigma projects resulted in streamlining two processes; lost and found items. This has resulted in savings of over 500 hours of labor, enabling staff to redirect their time to more meaningful work.

Site Authority



SOLD!

Completed sale of 46 remaining townhomes in University Glen previously part of rental program.



E-SIGNING

Streamlined proposal and invoice processes with electronic signatures.



NEW SITE

Launched a new interactive website for University Glen residents



Improving Communications

The University Glen residents spoke and we listened. In FY 2017-18, the Site Authority increased its efforts to engage with the residents, addressing tough lingering issues. These efforts resulted in a reduction in the number of complaints raised at University Glen Community Advisory Group meetings.

Vice President's Office



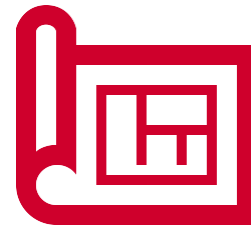
UNIVERSITY GLEN

Development of the second phase of University Glen moved forward with final approval of the development plan by the CSU Board of Trustees and amendment of the Specific Reuse Plan. Negotiations got underway with the selected developer.



MIXED USE

Feasibility study conducted on a new mixed use development on campus that would provide the campus with new student housing, instructional space and health services space.



Defining our Strategy

Vice President Trinidad helped lead the planning process for the CSUCI Strategic Initiatives as a member of the Strategic Initiatives Steering Committee and co-chair of the Subcommittee on Capacity & Sustainability. Learn more about the Strategic Initiatives at www.csuci.edu/president/initiatives/.

BFA Leadership



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CSUCI 2018-2023 Strategic Initiatives

1. Educational Excellence
2. Student Success
3. Inclusive Excellence
4. Capacity and Sustainability

Business & Financial Affairs Strategy Map 2018

Mission	Vision
We transform the delivery of quality services to support the campus through continuous improvement	We are the recognized leader for the delivery of outstanding services
Values: Teamwork • Diversity • Integrity • Respect • Excellence • Collaboration • Fun	

