

DIVISION OF BUSINESS & FINANCIAL AFFAIRS ANNUAL REPORT AND STRATEGIC WORK PLAN FOR FISCAL YEAR 2014-15

Introduction and Context

Organizational Structure: The Division of Business & Financial Affairs (BFA) is comprised of five units and four core programs plus auxiliaries that support the CI campus by providing essential services. The organization structure includes Financial Services, Human Resources, Facilities Services, Public Safety, and Administrative Services. Additionally, BFA is responsible for Budget, Financial Planning, Environmental Health & Safety, and Risk Management.

Role: As CI continues to grow, the division must anticipate needs and mobilize operations to increase capacity to support this expansion. Near-term planning must recognize that our current student population has reached approximately 5,000 FTES and that long-term planning will be for 15,000 FTES at full build-out. Current plans use an enrollment growth assumption of 8% per year. BFA strategic priorities focus on putting systems and structures in place to support this next major 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 we do business. In addition to incremental improvements in our operations, transformational changes to our unit and program leadership and business strategies will help us to serve 5,000 FTES and beyond. We continue to challenge and re-conceive our programs and services, putting systems in place while intentionally challenging ourselves as leaders. We are also empowering 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. The results of these investments are developing in the form 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 will identify the primary strategic goals of the division as identified and compiled by individual units (Attachment 1).

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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. It also includes special projects, organizational effectiveness, and risk management.
2. **Financial Services** - The unit includes three departments: Fiscal Services, Budget, and Student Business Services. 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.
3. **Human Resources (HR)** – 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.
4. **Facilities Services (DFS)**– DFS is responsible for planning, designing and constructing new buildings and renovations, maintaining buildings and landscaping, providing custodial services, managing utilities, and providing support services to the campus. DFS also maintains a liaison relationship with the Chancellor's Office for the coordination of capital projects along with reporting and compliance matters.
5. **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 the University Police Department; Transportation & Parking Services; and the Environmental, Health & Safety program (EHS).
6. **Administrative Services** – Administrative Services is responsible for the east campus including property management of for-sale and rental properties, as well as retail space. The unit oversees a commercial service that provides retail food services, residential dining, vending, and catering. Administrative Services also provides oversight of the CI Power Plant and Procurement & Logistical Services.

Accomplishments 2013-14

Business & Financial Affairs

As BFA aligns itself with the University's direction of "Creating the Next Decade," this year the division's title transitioned to Business and Financial Affairs. Operations, Planning & Construction transitioned to Facilities Services and Finance became Financial Services. In addition, some unit realignments occurred including the establishment of an Administrative Services function that ensures excellent operating support service to the campus, including planning for a central events office. The Division continues to address goals and objectives reflected in its divisional strategy map, many of which are multi-year in nature.

Once again, last year, in partnership with the Provost, BFA guided the campus **strategic resource planning** process for the 2014-15 fiscal year and drafted a budget recommendation. The Strategic Resource Planning Task Force (SRPTF), established last year, continues to reflect budget development processes on its website. These web pages provide access to budget information to the entire campus in support of the Task Force's commitment to transparency. Visit www.csuci.edu/strategic-resource-planning.

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Yearly snapshots continue to illustrate the thoughtful analyses of the University's resources to support President Richard R. Rush, Provost Gayle Hutchinson, and other senior leaders to facilitate sound and informed decisions. This year, our multi-year budgeting approach has been further developed by beginning to align resources directly to the campus strategic plan.

CI 2025, our 10-year "big idea" to develop and explore innovative approaches that will fund a major capital expansion for the campus, has progressed with the selection of a development advisor, Jones Lang LaSalle (JLL). The firm will advise CI on creating and executing solutions to the challenges we face as a growing institution.

In support of the work of the Foundation Board's Finance subcommittee, a Request for Proposal (RFP) was issued for a new financial advisor. As a result, Beacon Pointe Advisors were selected, and since the beginning of 2014, this firm has been actively engaged in providing the subcommittee with advice and recommendations for the university's portfolio.

The Vice President's office continues to be engaged in the recruitment process to hire a campus internal auditor. Last year, the recruitment was terminated without appointment, however the position has been reposted, and a committee is currently being formed.

Organizational Effectiveness Program (OE)

Achieve Operational Excellence:

- In the fall of 2013, a strategy was developed for a division-wide customer satisfaction survey for all staff and faculty, and this was subsequently distributed in December. The results have been analyzed, and action plans developed.

Recruit and Retain a Diverse and Talented Staff:

- In collaboration with Human Resources, a campus-wide Professional Development Program (PD) was launched:
 - Assessment of the customer satisfaction survey showed that there were organizational training gaps in the areas of **diversity** and **communication**. Further assessment determined what training could be offered that would enhance employee retention and overall department performance.
 - Following survey assessment, a variety of workshops were presented campus-wide, including diversity and communication training, to almost 300 CI employees.

Enhance Resources:

- Lean Six Sigma has continued its expansion throughout campus, further broadening its influence:
 - Two Green Belt classes were conducted during the year, bringing the number of Green Belt facilitators to 30.
 - An in-house Yellow Belt training was developed and provided to members of the Administrative Services team.
 - To date, over 300 CI employees have received varying levels of Lean Six Sigma training.
 - Since inception in 2012, Lean Six Sigma training and the projects initiated as a result of that training has resulted in over \$500k in operational savings and revenue enhancements.
- CI participated with all CSU's in the joint purchase of an on-line library of training courses (SkillSoft) that provides hundreds of hours of instruction.

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- A Shared Services charter has been drafted. This is an initiative not originally noted in the 2013-14 Work Plan.

Enrich Communication:

- Customer satisfaction survey results were communicated to campus staff, with emphasis placed on how the Professional Development Program's activities linked directly to survey feedback.
- To enhance the engagement of the Cabinet in Lean Six Sigma, "Champion" training was provided in February.

Metrics have been defined, established, and are being tracked for both the OE and PD programs.

Financial Services

Achieve Operational Excellence:

- Feedback from the customer satisfaction survey reflected an above-average score for the unit's overall performance.

Recruit and Retain a Diverse and Talented Staff

- Employee engagement was enhanced by providing professional development training opportunities to staff.
- In collaboration with the division's student assistants, a Student Assistant Mentorship Program was developed that will provide them with career guidance.

Enhance Resources

- Hyperion has been implemented for all auxiliary business units.
- The Extended University Session Fee set-up has been formalized through the development of a fee and payment plan calendar.
- A communication plan was implemented so that students can better understand deadlines and the process for exceptions.
- Effective fall of 2014, students can receive refunds directly into a checking or savings account.

Enrich Communication

- The Student Business Services social media presence has been enhanced through the addition of Twitter and Facebook. Tuition, fees, and updates are now being posted.

The metrics for Financial Services were defined, using the overall performance score from the 2013 customer satisfaction survey scores. The benchmark was established at 3.52 (5=excellent), and a goal has been set to achieve a score of 4.0.

Human Resources

Achieve Operational Excellence:

- The implementation of People Soft modules continued in the 2013-14 fiscal year.
 - o In July 2013, the campus-wide self-service Absence Management module was deployed.
 - o In March 2014, the Time and Labor Self Service (TLSS) was implemented.
 - o The Benefits Administration module was implemented in March 2014.

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- To improve customer service, several key processes have been reviewed and streamlined using Lean Six Sigma:
 - The Employee Requisition Form has been reformatted into two forms: one for employees and one for student employees. Originally slated for roll-out last fall, the forms will now need to be revised due to the implementation of TLSS; therefore, release of the forms has been withheld.
 - The Special Consultant COBRA letter functions have been improved.
 - The New Hire sign-in packet is now “form-fillable.”
 - The standardization of the Leave of Absence and Non-Industrial Disability processes is in progress.
 - Phones are answered on the first ring 60% of the time, and 99% of the time by the second ring.

Recruit and Retain a Diverse and Talented Staff:

- The CSU professional development software, SkillSoft, was launched, providing managers with the ability to identify specific courses, including diversity training, which will enhance employee skills to prepare them for career growth opportunities. This training option can be incorporated into employees’ annual professional development goals.

Enhance Resources:

- In coordination with Organizational Effectiveness program, members of the HR and Payroll staff have completed Lean Six Sigma Yellow Belt training; two members have received Green Belt certificates.
- In-house communication training was provided to requesting units.
- Leave of Absence (LOA) forms have been enhanced to be more efficient and user-friendly.

Enrich Communication:

- Several of the unit’s web pages were improved to make resources more readily available to customers utilizing HR services, including FAQ’s and the launching of a new TLSS page. Other activities which focused on enriching communication included:
 - Partnering with Academic Support Assistants and the Student Affairs Cabinet to present essential Student Assistant information.
 - A new Student Assistant evaluation form was created.
 - A group sign-in was developed for departments that hired more than five assistants at one time.
 - Process guides were developed for Absence Management and TLSS modules.
 - An on-line Benefits Orientation process was developed.

Metrics for the unit were defined following the feedback received during the 2013 customer satisfaction survey. The overall rating of Human Resources will be used as the baseline metric, which was established at an above-average score of 3.55 (5=excellent).

Facilities Services (DFS)

Achieve Operational Excellence:

- Working relationships with CI faculty have been strengthened through collaborative course development and class lectures.
- To ensure implementation of the unit’s safety program, Job Safety Analyses have been developed, and staff has been properly trained.

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- Efforts to enhance and improve strategic space planning, using a multi-year approach, are ongoing.
- A staffing plan and budget have been developed using a multi-year approach.
- A way-finding program for the campus was completed.
- Energy and water conservation projects were identified, and activities to increase recycling by 10% are ongoing.

Recruit and Retain a Diverse and Talented Staff:

- Diversity awareness was enhanced in DFS through staff participation in several diversity training workshops.
- The “Who Are We? What Do We Do?” training program was developed for new hires, and an annual refresher has been incorporated into the annual DFS retreat. Technical training and professional development opportunities were provided to staff.
- Custodial and grounds equipment management best practices have been established.
- To support a positive teamwork environment, employee BBQ’s, potlucks, and family get-togethers were hosted by DFS.

Enhance Resources:

- A Predictive Maintenance Program for equipment management for major and critical buildings has been completed, and the work order scheduling process has been implemented.
- A grounds efficiency plan has been implemented using “Breeze” for grounds management.
- The BIM (Building Information Modeling) is in the planning phase, with scheduled implementation scheduled in conjunction with the West Hall project. This model will be integrated into all major capital design and maintenance activities to enhance effective planning and project delivery.

Enrich Communication:

- FS will continue its communication program that was developed and implemented over the last two years, checking frequently with customers.
- The DFS newsletter is regularly published, and a sustainability communication program has been developed.
- Construction updates are routinely communicated via monthly blogs/emails, construction notices, periodic articles in Wavelength, and CI News.

DFS metrics have been defined through both the 2013 divisional customer satisfaction survey and DFS unit key performance indicators. The overall performance score is 3.67 (5=excellent); this metric will be tracked using future divisional surveys. Unit-specific key performance indicators are tracked on an ongoing basis.

Public Safety (PS)

Achieve Operational Excellence:

- PS continued to maintain liaison with campus community groups.
- Alternative transportation activities are interactive and coordinated with appropriate entities.
- The Illness, Injury, and Prevention Program has been reviewed, updated, and distributed as necessary.
- Appropriate job related training has been provided to all newly promoted personnel.

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Recruit and Retain a Diverse and Talented Staff:

- PS's focus on diversity is reflected through participation on the President's Commission on Human Relations, Diversity, and Equity. All police officers have participated in diversity-related training, and during the past year, the department has made the recruitment of female police officers a priority.
- Lesson plans are available for all training courses conducted by the department, and are reviewed and updated as necessary.
- Transportation alternatives have been improved for use by students, faculty, and staff.
- The systemwide WERCS Affinity Group continues to be supported by PS through meeting attendance, conference calls, and training/workshops.
- Collaboration continues with the Business Continuity Planning Committee (BCP) to test/exercise campus Business Continuity Plans.

Enhance Resources:

- The Kristen Smart Agreement has been reviewed and updated/enhanced in collaboration with the Ventura County Sheriff's office.
- The alternative transportation program was communicated to the campus community in a variety of methods.
- Staff and student health and safety training activities have been developed, reviewed, and updated, as appropriate.
- After-Action Reports have been completed following each exercise or simulated emergency incident.

Enrich Communication:

- Information, including crime patterns or trends, was displayed on the Police Department's website.
- Minutes from the Health and Safety Committee meeting were posted online.
- The Emergency Operation Plan has been communicated to the campus community in a variety of methods.

Metrics have been defined for Public Safety through the 2013 divisional customer satisfaction survey, and a benchmark has been established using the mean score of 4.26 (5=excellent) for the overall performance of the unit. Activities to continuously improve Public Safety are ongoing.

Administrative Services

Achieve Operational Excellence:

- The Town Center Market program was developed that included food concepts, design, and construction. The new facility opened in the spring, and won the National Gold Award from NACUFS.
- The exterior dining space at Islands Café was expanded.

Recruit and Retain a Diverse and Talented Staff:

- Diversity was included within Administrative Services Supervisors Professional Development Seminar Series through a workshop on Meyers-Briggs Personality Profiles.
- A new Chef de Cuisine was hired for Islands Café.

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Enhance Resources:

- Catering was expanded during the year, with sales showing an increase of fifty percent over the previous year. Additionally, two weddings were catered.

Enrich Communication:

- Workplace communication and team development was improved through staff participation in the Professional Development Seminar Series.

Metrics were defined through the BFA customer satisfaction survey, and overall performance of the unit was established as the benchmark.

Special Projects

Achieve Operational Excellence:

- The Strategic Risk Management program continued to develop with emphasis placed on communication.
- The records retention program informed the creation of an Administrative Directive.

Recruit and Retain a Diverse and Talented Staff:

- The copier program implementation process was completed in October.

Enrich Communication:

- The Park Advisory Group was established to guide park management and operations.
- The Operations Work Group conducted several meetings throughout the academic year.
- Websites were maintained, with a variety of updates and reports inserted.

Metrics were defined through both the Vice President's office and unit-specific overall performance mean scores. Actions to improve scores will be identified and tracked during the 2014-15 fiscal year.

Divisional Key Initiatives for FY 2014-15

During the past year, BFA staff members were actively engaged with the revision of the university's strategic plan through their attendance at town hall meetings. Now, the division's strategic plan has been revised to closely align with the new campus-wide plan. Although the activities within the BFA have always been implicitly reflective of the campus' strategic goals, this year BFA will focus on recognizing and appreciating how we connect what we do every day to further the CI mission, while engaging in activities that support the division's strategic goals. With the rapid growth and development of the campus, we have identified this as the key overarching goal of the division, and to that end, everyone in BFA is considering the following question:

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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 "better place" message will help to remind each of us every day to serve our students to our best ability by developing good solutions, thinking creatively, and working collaboratively.

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 a major capital expansion strategy that will support the next decade of growth. Through the engagement of JLL, we will begin strategy development, execution, implementation, and delivery of a capital expansion program.

Lean Six Sigma: A key component of the division's efforts to meet its goals and objectives to support the campus are supported by the division's Organizational Effectiveness Program (OE).

Purpose: To strengthen 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 continue 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 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 be explored within the CI community, including faculty, and the community at large.

Organizational Effectiveness Program

Improve Operational Excellence:

- Identify core transactional tasks of the division, by unit, and set goals for improvement that are based on best practices in order to achieve excellence in operations.



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- Develop a strategy for providing the customer service FISH! Philosophy to the entire campus community.

Attract and Retain a Diverse and Talented Staff:

- Direct a two-year training plan for staff development.
- Transition the activities of the Professional Development Program to Human Resources.
- Continue to leverage existing partnerships while exploring new community and CI partnerships for PD opportunities.

Enhance Resources:

- Work closely with the Conference & Events office to ensure that the shared services model is implemented.

Enrich Communication:

- Using CI's five top marketing tools (i.e. website, Wavelength, etc.):
 - o Create and implement a communication plan for the PD program.
 - o Communicate OE activities as they relate to survey results.

Metrics that were defined and established during the 2013-14 fiscal year will continue to be tracked. Other metrics may be identified, established, and tracked over the course of the upcoming year.

Financial Services Goals – Key Initiatives

Improve Operational Excellence

- Develop benchmarking criteria to better understand how we rank with our peers.

Attract and Retain a Diverse and Talented Staff

- Enhance employee morale through engagement in fun activities to support teamwork.
- Provide professional development opportunities whenever possible, and incorporate the identification of employee-specific trainings into annual evaluations.

Enhance Resources

- Continue to enhance Hyperion reports and functionality to provide accurate year-to-year comparisons.
- Develop winter term communication plan for Extended University sessions to better serve students, with an emphasis on financial aid recipients.
- Document processes to reconcile budgeted/funded positions. Develop new position management forms, and provide communication and training to campus community.
- Create reports and planning tools to inform decision-making with regard to capital budget projections and forecasting.
- Document and implement a process whereby refunds can be provided to students in a timelier manner.
- Develop a process that will facilitate tuition payments by third parties.
- Implement Accounts Payable direct deposit for staff, faculty, and for vendor reimbursements.

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- Automate the fee waiver process.
- Convene a team to improve the current collections process.
- Refine processes and procedures, and create efficient policies and/or directives that support excellent customer service.

Enrich Communication

- Expand participation in Student Affairs events, including with Housing & Residential Education (HRE), to promote awareness of Student Business Services to students. Promote events on social media.
- Enhance and automate refund process to allow for notification of pending refunds to students.
- Communicate with students who have outstanding balances to ensure their continued enrollment.

Metrics focus will be to improve the overall performance benchmark (3.52) by 10% (3.87). Activities will be in direct response to survey comments that relate to the perception of a “no” culture in FS.

Human Resources – Key Initiatives

Achieve Operational Excellence:

- Continue implementation of People Soft modules and research PeopleSoft recruiting module to determine viability of implementation.
- Continue review of Absence Management and TLSS to enhance customer satisfaction.
- Review and redesign key processes, procedures, and guidelines to improve customer service.

Recruit and Retain a Diverse and Talented Staff:

- Assess Great Colleges to Work for survey to identify opportunities for improvement.
- Collaborate with Title IX Inclusion Officer to support development of a diversity training program.

Enhance Resources:

- Continue development of a library of training courses for supervisors and managers to include: New Supervisor 101, Communication Tools, Performance Evaluations, Classification Review, Progressive Discipline, Recruitment, etc. Also, in coordination with Organizational Effectiveness program, identify training that supports Lean thinking – Yellow and Green belt certification and customer service training.
- Partner with Shared Services to streamline routine processes.
- Document Payroll and other HR processes and increase the use of electronic processes.

Enrich Communication:

- Improve web pages to enrich communication and optimize mobile device access.
- Develop video training for routine processes, including sections of New Employee Orientation.

Metrics will be tracked during this year’s first quarter using baseline numbers which were identified in the 2013-14 fiscal year.

Facilities Services – Key Initiatives

Improve Operational Excellence

- Conduct a DFS customer service survey in fall of 2014.
- Support a strategic space planning review for the next three to five years.
- Ensure capital projects are completed on time and on budget.
- Continue campus refresh program.
- Engage in academics through lectures and course development.
- Offer capstone project opportunities for student assistants.
- Implement a state-of-the-art safety training program.
- Launch energy and water conservation projects, as well as continue efforts to improve waste reduction efficiencies.
- Launch continuous commissioning program to improve sustainability performance.

Attract and Retain a Diverse and Talented Staff

- Provide training to staff on standard operating procedures.
- Implement individualized development opportunities for staff.
- Support managers through offering management training sessions.
- Sustain employee morale program.

Enhance Resources

- Implement Preventive Maintenance Program, and in conjunction with this, improve work order prioritization and scheduling.
- Refine key performance indicators for DFS.
- Assess grounds management program implementation and inventory practices.
- Integrate BIM into major capital design and maintenance.

Enrich Communication

- Continue sustainability communication program.

Metrics will be tracked using baseline data from the 2013 customer satisfaction survey.

Public Safety

Improve Operational Excellence

- Improve customer service
 - Staff the Customer Service Counter until 7:00 p.m. on all academic calendar days.
 - Offer ergonomic assessments to all CI employees.
 - All FTE employees will complete the CSU/SkillSoft Customer Service Fundamentals and Customer Focus courses.
- Prepare for growth
 - Seek approval for the construction of 500 – 1000 additional on-campus parking spaces in support of increased student enrollment and residency.
 - Plan for intra-campus shuttle on academic days.
- Share expertise and services

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- o Establish formal working relationship with Title IX Coordinator.
 - o Collaborate and offer assistance to the newly created Special Events work group.
 - o Continue to define the Environmental Health and Safety relationship with area-specific safety coordinators.
- Succession planning
 - o Identify future leadership gaps and potential leaders from within existing staff.

Attract and Retain a Diverse and Talented Staff

- Create operations manuals
 - o Finalize Operations Manual for University Public Safety Officers and Dispatchers.
- Foster entrepreneurship
 - o Support Lean Six Sigma Green and Yellow Belt training.
 - o Host monthly brainstorming sessions across the unit.
 - o Offer robust development opportunities by fully delivering on employees' training plans.
- Community building
 - o Conduct quarterly security contacts with staff at the John Spoor Broome Library, HRE, Student Union Building, CI Power, the Cashier/Enrollment Center, Office of the President, Student Government, HR, and satellite campuses.
 - o Attend monthly meetings of the University Glen Homeowners Association, Ventura County Law Enforcement Coordinating Committee, Ventura County Transportation Commission, and participate in the CSU systemwide Emergency Managers conference call.
 - o Facilitate quarterly University Safety meeting.

Enhance Resources

- Document processes
 - o Review and update the campus' all-hazards Emergency Operations Plan.
 - o Completely document the recruitment process for police officer and dispatcher.
 - o Review and update as necessary the cash handling procedure and the evidence and found property handling process.
 - o Implement on-line, web-based, self-service solutions.
 - o Implement an on-line commendation/complaint/concern solution for police conduct.
 - o Streamline processes for timeliness and efficiency.
- Improve reporting
 - o To the greatest extent possible, post appropriate work group reports to the Public Safety web page.

Enrich Communication

- Improve websites
 - o Refresh Public Safety web presence (University Police Department, Emergency Management, Transportation & Parking, and EH&S).
- Increase the variety of communication tools
 - o Determine feasibility of incorporating digital signage and a campus radio station into the emergency notification system.
 - o Pilot a YouTube channel for the unit.

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Metrics will be tracked using baseline data from the 2013 customer satisfaction survey.

Administrative Services

Improve Operational Excellence

- Develop a marketing plan to compliment campus activities to improve customer service.
- Implement a secret shopper program to review program effectiveness.

Attract and Retain a Diverse and Talented Staff

- Complete the hiring process for a Manager of Conference and Events Office (CEO).
- Encourage and support professional development and certification, including customer service training.
- Provide campus training for online requisitions, the ProCard program, and the request for proposal process.
- Review and improve University Glen Corporation (UGC) hiring process, focusing on diversity.

Enhance Resources

- Participate in the planning for two major construction projects to be opened fall of 2016:
 - o 600 bed-spaces for Student Housing
 - o Expanded Islands Café dining
- Collaborate with Extended Education to locate new space for their Thousand Oaks Campus.
- Complete the transition of CEO operations to Administrative Services.
- Investigate a campus-wide mail stop system for more efficient mail delivery.
- Create, review, and/or revise policies and procedures for CEO and procurement operations.
- Investigate a division or campus-wide document processing system, and implement electronic signatures.
- Plan the implementation of a wok station in Islands Café, facilitate the opening of the new Indian restaurant in Town Center, and expand catering.
- Develop a plan for a mobile food facility to respond to campus growth.
- Research grant opportunities.
- Upgrade the 328 apartments with microwaves.
- Repaint all red curb, signage posts, and fire hydrants throughout the property.
- Purchase required HVAC equipment and train techs how to switch out compressors/heat pumps.
- Oversee property enhancements to ensure property is restored to pre-Spring Fire condition.

Enrich Communication

- Update Procurement & Logistical Services website.
- Improve communication with employees and community.

Metrics will be tracked using baseline data from the 2013 customer satisfaction survey.

Special Projects

Improve Operational Excellence

- Continue to expand the Business Continuity Program.
- Continue development of the Copier Program.
- Respond to Public Records Requests in a timely manner.

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- Achieve accurate documentation of expenditures.
- Risk Management
 - Transition program management to UGC and Site Authority.
 - Create transitional training program for Associated Students Incorporated and CI Foundation staff.
- CI University Park
 - Engage consultant to complete the park's Mini-Master Plan.

Attract and Retain a Diverse and Talented Staff

- Participate in staff professional development about key areas such as metrics, risk management, and legal continuing development.

Enhance Resources

- Enhance Risk Inventory Program.
- Create Administrative Directive for audit process.
- Support CI 2025 project to ensure work flow is efficient.

Enrich Communication

- Maintain websites, updating information regularly.
- Seek opportunities to gather information campus-wide.
- Maintain and further develop annual trainings/workshops.

Metrics will be tracked using baseline data from the 2013 customer satisfaction survey.

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Attachment I



CI 2014-19 Strategic Priorities

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

Business & Financial Affairs Strategy Map 2012-17

Mission	Vision
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

BFA Goals

Improve Operational Excellence

Attract and Retain a Diverse and Talented Staff

Enhance Resources

Enrich Communication

- 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

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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

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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.