



ANNUAL REPORT

California State University Channel Islands
Division of Business & Financial Affairs

FY18-19

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Message from Vice President Trinidad



Division of
**BUSINESS &
FINANCIAL
AFFAIRS**

C H A N N E L
I S L A N D S

Introduction and Context

The Division of Business and Financial Affairs (BFA) actively facilitates the strategic goals and plans of CSUCI through the alignment of our divisional strategic plan with the University's current Strategic Initiatives. BFA provides the CSUCI campus with essential services, and during Fiscal Year 2018-19, was comprised of six units: Administration, Budget & Planning, Facilities Services, Financial Services, Information Technology Services, and Public Safety. As we move into FY2019-20, the Administration Unit will be reorganized into two units: (1) Business Transformation and Support and (2) Administrative Services.

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

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.

Annual Report

In the interest of transparency, BFA publishes this annual report highlighting the work performed by the division during the fiscal year. This work aligns with the University Strategic Initiatives as well as the BFA strategic plan.



Division of Business & Financial
Affairs Mission:

***We transform the delivery
of services to support the
campus through continuous
improvement.***

Administration



TRAINING GOAL

50% percent of managers on campus completed Management Training, exceeding target for the year



CATCHING UP

Title IX reduced backlog of over 250 open cases to 75 open cases in one year



ASSESSING RISK

New Risk Assessment tool developed for campus and approved by President's Planning & Policy Council



Developing KPIs

The Administration team assisted in developing Key Performance Indicators (KPIs) tied to the CSUCI Strategic Initiatives and the workplans of the Division of Business & Financial Affairs. Going forward, these KPIs will help the division and campus gauge the success of their strategic and operational efforts.



Lighthouse Café in the Student Union

UAS Sustainability Efforts

University Auxiliary Services, Inc., the organization responsible for food service and catering on campus, took a number of steps this fiscal year toward more sustainable operations. This year, the team converted the straws and drink lids at all UAS retail locations and from plastic to compostable materials.

UAS has also begun phasing out sales of single-use water bottles. Instead, they are converting to more sustainable alternatives in their retail and catering operations, including a reusable metal bottle and boxed water options. The new options resulted in a 33% reduction, exceeding the first-year goal of 25%.

Finally, UAS partnered with Facilities Services to place “PourAway” recycling bin lids on recycling bins located in campus dining facilities. Recycling facilities will not accept any recyclables that contain drink or food residue, so adding these lids is an important step in ensuring the containers placed in the blue bins actually get recycled.

Improving HR Processes

The HR team set a goal of making five process improvements during Fiscal Year 2018-19. It not only met that goal but added one more process improvement on top of that. Among the processes reviewed and streamlined were: new hire tracking, employment verification, W-2 tracking and process for replacements, removing student assistant working titles from PeopleSoft, implementing electronic workflow and ticketing process for HR-related functions, and redesigning and implementing a simplified campus-wide payroll calendar to streamline communication.

Go Lean

The Organizational Effectiveness (OE) team continued its efforts this year to support teams to improve their business processes. In FY18-19, the OE team organized three cohorts of Lean Six Sigma Green Belt training, resulting in ten new improvement facilitators on campus.

The OE team also launched two new training courses in January 2019 to strengthen campus-wide improvement efforts: (1) Champion Training for managers interested in championing excellence on campus, and (2) Essentials of Lean Training to include all staff in the process of making us better. The results of OE’s efforts were \$563,498 in staff-driven process savings.



Green Belt Training

Clery

The Title IX & Inclusion team took the lead this year on Clery Act compliance and reporting on campus. Among other efforts, the team launched a new website to increase awareness of the CSUCI Clery program and reporting requirements.

Improving Employee Data

The Data Quality and Management team worked for much of FY18-19 developing a data warehouse for employee information. Completed in March 2019, the new employee data warehouse includes 3 levels of data, six stored procedures, nine tables, 16 views and 25 charts. The data warehouse includes data back to the year 2000, with a snapshot of employee information from the last day of every quarter.

The data warehouse (OneCI) now allows the campus to consume external source data (e.g. Peoplesoft/ERS flat files/Canvas) for improved business intelligence, decision support, and reporting on student information and outcomes. OneCI also consists of Tableau visualization tools. OneCI goals are to support the campus in creating a culture of assessment, evidence-based decision making, responsible use of data, ensure accurate and reliable institutional data, and create accessible and transparent institutional data access as appropriate for internal and external audiences.



At work inside the SSSC call center

New Solutions for Campus

The Shared Services Solution Center (previously, the Solution Center) provides a one-stop-shop and first layer of support services to students, faculty, staff, and others. These services include, among other things, assistance with campus account access and security issues, other IT-related services, student financials, and records. The SSSC supports campus efforts to improve business process, increase service efficiency, effectiveness, and capacity, as well as improve the customer experience.

The center does this in a couple important ways. First, the center addresses general-level issues so higher-level staff are able to focus more of their time on duties requiring their subject matter expertise. Second, the center helps to gather data to inform business process development and improvement opportunities to increase effectiveness.

In January 2019, the SSSC expanded its services to include support for faculty and staff with Human Resources questions. In the first few months, center staff were able to resolve 40% of calls without transfer to higher-level staff. The center was able to route an additional 37% of calls directly to the relevant HR subject matter expert without the need for intermediate-level staff review. The data collected by SSSC has also already contributed to eight (8) improved HR business processes. As the SSSC continues to expand its services, this impact on our campus's business processes will only grow and, in turn, help the campus grow.

Budget & Planning



NEW LEADERSHIP

Budget & Planning established as separate unit in BFA under leadership of new Assistant Vice President Barbara Rex

ALIGNING WORK

Worked with Financial Services to better align work with skillsets and funding across the two units

DEFINING GOALS

Reviewed budget systems, processes and staff assignments to identify areas for improvement in FY19-20



Capital Planning Work Group

Budget & Planning launched a new working group for capital planning continuous improvement, which resulted in a new framework for general ledger assignments and project reporting.

Facilities Services



CAPITAL PROJECTS

Advocated for and received Chancellor's Office support for new capital projects, infrastructure improvements, and deferred maintenance



BEE CAMPUS

Worked collaboratively to apply for and receive Xerces Society's Bee Campus USA recognition, becoming the first 4-year university to do so



ON BUDGET

Executed budget to nearly 100% without overspending while meeting mission critical needs



Setting a Course for Solar

Facilities Services negotiated a Power Purchase Agreement for the installation and operation of a 3.7 megawatt solar array on campus, which will be capable of meeting 68% of CSUCI's electrical load by 2021.



Spring 2019 Commencement in the Central Mall

New Commencement Location

For the first time in CSUCI's history, spring commencement was held in the central mall area of campus, with the iconic Bell Tower as a backdrop. Facilities Services collaborated with the Conference and Events team to prepare central mall for the ceremony, including refreshing planters, fertilizing lawns, patching decomposed granite, trimming trees, and sand blasting the fountain to remove hard water stains.

Improving Customer Service

The Facilities team completed APPA's Facilities Management Evaluation Program (FMEP), which provided a customized evaluation of the organization conducted by a team of institutional peers. The Facilities team's goal in conducting the FMEP was to look for areas of potential organizational improvements with an eye toward improving overall customer service.

With the FMEP complete, the Facilities team has begun implementing recommendations from the evaluation, including a top recommendation to restructure and revamp Key Performance Indicators (KPIs). The Facilities Services team is reworking its KPIs to standard ones used in higher education for facilities management so that it can better set goals and compare performance with peer organizations.

Supporting Service Learning Projects

The Facilities Services team works with faculty at CSUCI to support service learning projects for students. One area of particular interest and overlap has been the area of sustainability. In Fall 2018, Facilities Services partnered with Professor Dan Reineman and his Land Use Management (ESRM 464) class, developing two service learning projects for students enrolled in the class. One group of students created a "Walking Tour" of the campus, highlighting the cultural and social history of the land that CSUCI stands upon. The other group conducted an analysis on the current and potential usage of Channel Islands (CI) Park - the open space that resides adjacent to our campus. The Facilities team served as both a customer and mentor to the students as they worked on their projects throughout the semester.



Utilities Data

In FY2018-19, Facilities Services installed SkySpark analytics software to better track utilities consumption by the campus. The software will allow for more accurate bill paying and highlight areas where we have energy consumption trending data that needs to be addressed.

Financial Services



NEW DEPARTMENT

The Site Authority Financial Services Department was established in FY2018-19, freeing up one campus FTE to be strategically reconfigured



E-SIGN

Student Business Services converted its student payment plan contract to an electronically signed document



Benefits of Cross-Training

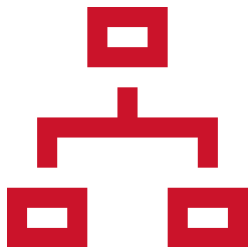
The Financial Services team made a concerted effort to cross train staff in FY2018-19. Three temporary reassignments were initiated, providing an opportunity for staff to learn new skills while increasing workforce sustainability. In the process, Financial Services identified capacity that allowed for reallocation of 2 full-time staff.

Information Technology Services



REORGANIZATION

ITS completed a reorganization in FY2018/19 and is now a unit of BFA under the leadership of new CIO Jim August



TICKETING SYSTEM

Implemented TeamDynamix ticketing system for IT requests, providing more self-service options and better transparency



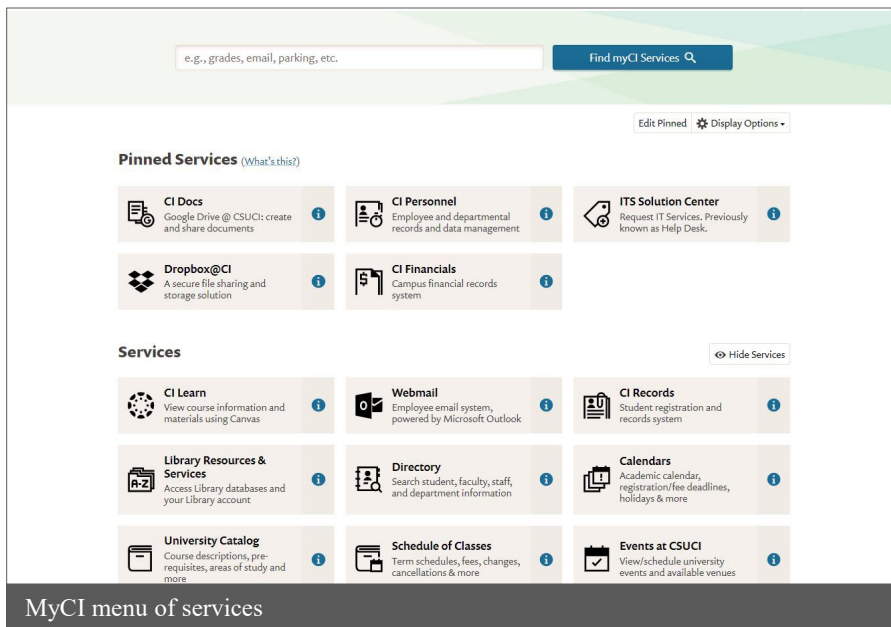
CUSTOMER FOCUS

Completed a number of successful customer-focused projects, including VIA assessment management system for School of Ed



Sharing What We've Learned

In addition to implementing TeamDynamix for IT requests, the ITS team has also helped Human Resources and Financial Services utilize the tool for their own ticketing processes.



MyCI menu of services

MyCI Enhancements

MyCI is the most viewed CSUCI website, with an average of 1 million views per month. It's the campus' single point of access for major applications, including email, records, trainings, and other important resources. Improving the usability of the myCI portal and building on its capabilities can positively impact students and employees alike.

In 2018-19, based on requests from students and the campus community, the ITS Web Services team focused on improving personalization, searchability, categorization and administration of myCI. They completed a redesign of the interface, added services, and made it easier to discover and access those services. Some specific highlights include a new option for users to pin favorite or most frequently used services to the top of their myCI page, a new search bar allowing for search of myCI services by name or purpose, and the ability to customize your myCI layout.

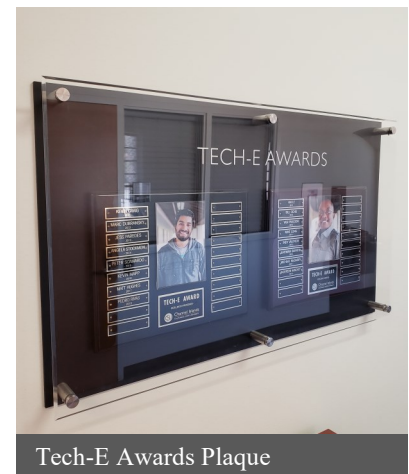
Staying Up to Date

Fiscal Year 2018-19 was a busy one for the ITS Application Services team, which provides support services for the enterprise-wide computing applications behind CSUCI's core business processes. In total, the team completed 20 different enhancements, retro-fits and maintenance tasks to core applications CI Records, CI Personnel and CI Financials. In addition, the Application Services team developed and deployed seven new integrations and modifications within these core applications. The team also improved and ensured the continued functionality of a variety of systems used across campus, including: Smart Planner, Title IX interface, Symplicity, CashNet, Canvas, Maxient, Parchment and College Scheduler.

Cost Savings Efforts

ITS implemented a number of cost-saving measures in FY2018-19, including:

- Migrating the myCI portal to a new cloud service, improving availability and reducing annual spend by about 30%,
- Changing spam filter and data loss prevention software for a savings of approximately \$80,000 per year, and
- Migrating to the TeamDynamix ticketing system for a savings of at least \$12,000 per year.



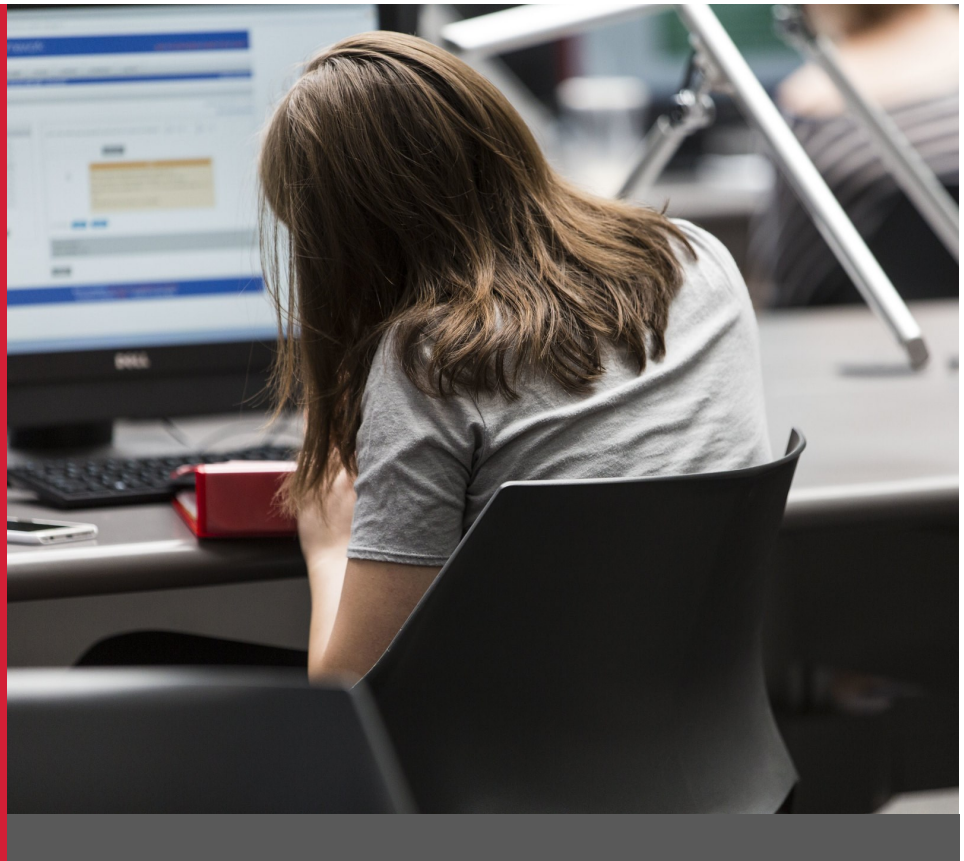
Tech-E Awards Plaque

Job Well Done

ITS reinstituted the Tech-E Award in FY2018-19, recognizing staff member within ITS for excellence in service to the University and excellence in their profession. ITS created an award committee to help guide this effort in the future.

Digital Citizenship Outreach

ITS launched a new Digital Citizenship outreach effort in FY2018-19, designed to encourage employees to be technically literate, innovative and ethical. Based on suggested topics received from members of the Division of Business and Financial Affairs during a team meeting, four members of the ITS team developed and led four training workshops through the Professional Development and Personal Enrichment program. Topics included creating electronic surveys and forms using Qualtrics and collaborating using Google Docs.



Electronic Filing for Student Records

Historically, CSUCI has managed student records in physical form, a method that is time-consuming and requires use of already limited physical storage space on campus. Furthermore, student records are often used by more than one area on campus. As a result, some areas duplicate record keeping, and/or must coordinate with Enrollment Management to manually access the records.

ITS partnered with Enrollment Management and external partners to deploy an enterprise electronic document imaging and storage platform. This system facilitates scanning, indexing, storage, retrieval, retention and disposal of student records.

In FY2018-19, ITS worked with Enrollment Management to transition student transcripts to this electronic system (Fileflow). The electronic system serves to increase the security of student records, provide a central electronic location for student records, enable campus staff to access records more efficiently, automate document retention in compliance with University policies, and decrease the amount of physical space on campus currently used to store physical records.

To date, 614,919 student records have been converted to the electronic system, including over 560,000 documents and transcripts previously stored in legacy system.

Public Safety



CARPOOLING

In the first year of an enhanced carpool program, the number of carpool participants increased by 1,631%



INFORMING

Launched a new, interactive online platform for crime and incident information



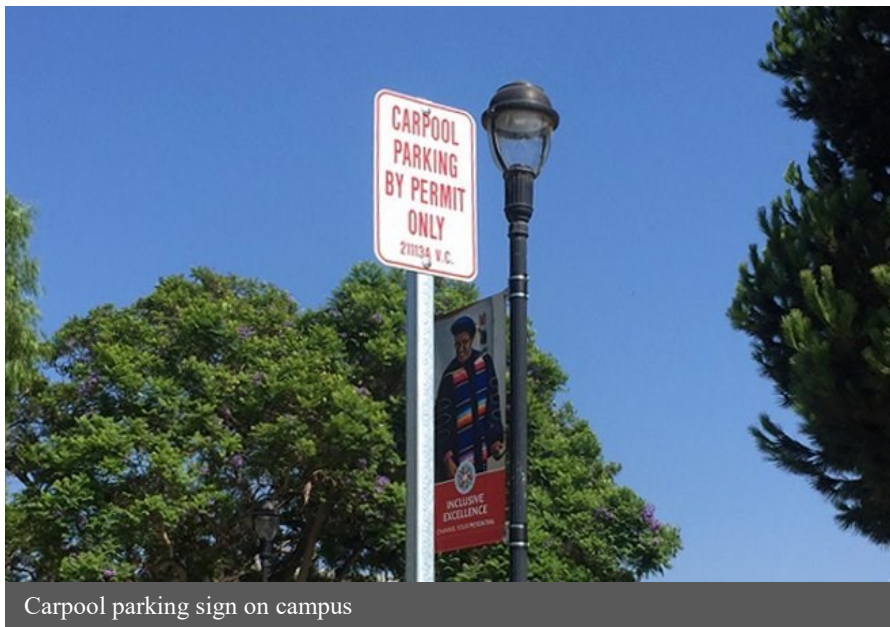
PLANNING

Developed a comprehensive strategic plan to reduce the number of single-occupancy vehicle trips to campus



More Information at Your Fingertips

The new online platform launched this year by Public Safety, known as Citizen RIMS, makes it possible for the public to view near real-time mapped incidents, the daily crime/fire log, a weekly bulleting, and more!



Carpool parking sign on campus

Progress on Strategic Plan

Transportation & Parking Services completed development of its comprehensive 5-year strategic plan to reduce the number of single-occupancy trips to the campus and carried out the action items associated with the first year of the plan. The strategic plan focuses on developing, expanding and incentivizing alternative modes of transportation on campus.

Highlights from the parts of the plan implemented this fiscal year include:

- The creation of a new Parking & Transportation Demand Management (PTDM) specialist position who will coordinate the University's alternative transportation programs.
- Establishment of 65 conveniently located, highly visible carpool stalls. With these stalls and through promotion and education, the number of carpool participants on campus increased by an incredible 1,631%.
- Increase in bus ridership to campus as a result of efforts like the county-wide partnership to provide free transit cards to students and increasing bus service from six to seven days per week.

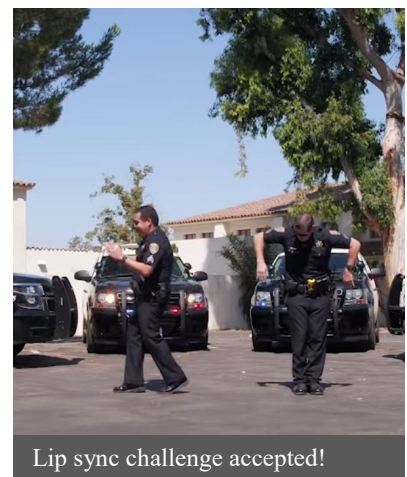
Improving Security Systems

In response to considerable feedback from the campus community which followed a series of tragic incidents during the fall 2018 semester, the police department led a comprehensive security assessment of the campus' facilities. The assessment yielded a project proposal for improvements related to door locks, security cameras, loudspeakers, and digital message boards throughout campus. This \$2.5 million project has been approved and will be implemented over the course of the next three years.

Threat Management

The Police Department developed a new Threat Management Unit in Fiscal Year 2018-19.

The new unit was created to work closely with the University's Campus Assessment, Response and Evaluation (CARE) Team to formalize the threat assessment and threat management process for the campus. Four police officers have completed advanced training relating to this specialized assignment and will continue to build the program moving forward.



Lip sync challenge accepted!

Lip Sync Challenge

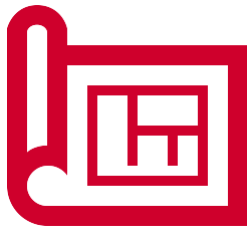
The police department launched a "Lip Sync Challenge" video via social media, with the video receiving over 10,000 views in the first three days. The release of this video was part of a significant effort to increase community outreach and communication through the use of social media.

Vice President's Office



CAPITAL PLANNING

In FY2018/19, over ten capital projects, both large and small, were being developed to prepare for growth. This includes the upcoming Gateway Hall project, which has been approved for funding and is on track for a September 2024 open.



KEY LEADERSHIP

Two critical leadership positions in BFA were filled this year. Jim August was hired as CIO/Associate Vice President for ITS, and Barbara Rex was hired as Assistant Vice President for Budget, Planning & Analysis.



Opening Communication

This year, we launched a renewed newsletter for the division entitled, “The Companion.” The new publication will be released three times a year and is designed to highlight the amazing people and work in our division, to keep team members updated on how we’re contributing to the University’s mission and strategic initiatives, and to give some articles of personal interest.

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	

Value to Our Customers

Provide responsive service that is quantitative and reflects value

Facilitate innovative and sustainable solutions 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 and Diversify Revenue Streams

Enrich Communication

- Improve customer service
- Support growth
- Share expertise and services
- Collaborate with partners to achieve operational excellence

- Support inclusive excellence
- Create operations manuals
- Offer robust development opportunities
- Community building
- Support succession planning

- Improve and document business processes
- Implement on-line, web-based, self-service solutions
- Improve reporting
- Foster entrepreneurship

- Improve websites
- Increase the variety of communication tools
- Actively listen to customers as a driver to improve