

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 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

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

Overview of Units

1. Vice President's Office— The Vice President's office is responsible for ~~BSA~~ strategy and leadership as well as the overall planning and management of the campus. ~~It includes special projects, organizational effectiveness, and risk management.~~
2. Financial Services -The unit includes three departments: Fiscal Services, Budget Student Business Services. Combined, these units are responsible for ensuring that all accounting, 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 resources 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 as ~~9P1~~ new

Yearly snapshots

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

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

Enrich Communication

- Customer satisfaction survey results were communicated to campus staff, with emphasis placed on how the Professional Development Program's activities related 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 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 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 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 overre has b96 0.48 re f EM(i)-mance11(, s-2(no)-2(r)-4

- To improve customer service, several key processes have been reviewed and streamlined using Six Sigma
 - The Employee Requisition Form has been reformatted into two forms for employees and one for student employees. Originally slated for rollout 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 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 employees' skills and 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

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

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 specific overall performance mean scores. Actions to improve scores will be identified and tracked during the 2015 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 is

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

- 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

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

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

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DIVISION OF BUSINESS & FINANCIAL AFFAIRS

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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. Dramatic change 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 great11.04

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