

Finance and Administration's Annual Report for 2009
Submitted August 31, 2009

President Rush,

I take great pride in the accomplishments of my Division. The annual summary of what we have accomplished takes my breath away as I marvel at the commitment and dedication of our very loyal staff. The following report has been prepared in the new condensed format that you requested. This report incorporates the Information Technology Division, also as you requested.

Joanne Coville, Vice President for Finance and Administration

A. Highlights in the Finance and Administration

a. Distinguished accomplishments of employees – selected list – in alphabetical order

- **Shawn Bartlett** was promoted to Sergeant, and is now responsible for supervising a group of sworn police officers while also managing the department's training program and records.
- **Dan Borgstrom, Dan Russ, Gene Lai and Kevin Medley** attained national Emergency Medical Technician certification.
- **Dan Borgstrom and his K9 partner Hero** completed a 320 hour training program that resulted in Hero being certified in both Patrol Tactics and Narcotics Detection.
- **Maribeth Bradberry**, Accounting Manager, has recorded all assets into a QuickBooks fixed asset database, thus enabling enhanced data organization that facilitates both capital asset review and a monthly depreciation schedule. Fixed asset accounting has haunted us in our past audits and this positions us for smooth audits.
- **Kevin Craig, Peter Scamardo, Marc Aten, and Ryan Garcia** modeled outstanding teamwork in improving services to students through the myCI Student Portal. The applications include Dolphin Email, CI Learn (BlackBoard), and CI Records (PeopleSoft) via a single sign-on. And, students can now change their password or recover a lost one. Further, a new application, called Dolphin Files, allows students to access network files via the web from anywhere in the world. And, a new "Important Student Information" service will keep students informed about critical information they need to stay enrolled and be successful at Channel Islands.
- **Bill Kupfer**, Director for Environment, Safety, and Risk Management, gave a presentation at the CSU Planning Design and Construction meeting about cooperation and collaboration between SETC Health and the Safety Committee, representing SETC workers, management, and Employee Health & Safety.
- **David Carlson** developed the Facilities Link, a graphic database of campus maps, buildings, and plans which will provide the foundation for campus-wide integrated databases.
- **David Carlson** received a Masters of Public Administration from CSU Northridge in May 2009.

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- **Ceci de Soto-Teunis** was promoted to Corporal, and is now responsible for leading the Police Department's operational liaison with other campus groups.
- **Jeff Donlin**, who manages the Energy Management System for the campus, has re-programmed the heating, ventilating, and air conditioning system (HVAC) to run more efficiently, resulting in more than \$50,000 in electricity savings while at the same time reducing the campus' carbon footprint.
- **Lacey Lovejoy** has provided excellent analytical and technical skills for Student Financials Accounts Cleanup project. Most significantly she has produced the first accurate student finance aging report since the implementation of the Student Financials module within the CSU. The Chancellor's Office has since adopted Lacey's version as a best practice, and is distributing it to all campuses. Further, she has corrected a long-standing issue with the monthly financial reports, which has resulted in accurate encumbrance numbers. She has also reduced the processing time required to generate the monthly nVision Finance to just 15 minutes.
- **Alan Paul** is recognized for his collaboration with numerous local agencies as well as with the Chancellor's Office to achieve efficacious approvals for a number of major projects, including the completion of the Supplemental Environmental Impact Report for the entry road and the acquisition of County Parkland.
- **Kevin Medley** was promoted to Corporal, and is now responsible for leading the Police Department's oversight of alarm systems on campus and crime prevention programming.
- **Nicolas Mendoza** has been recognized by managers and supervisors within the Operations Department as the most valuable maintenance person.
- **Jennifer Schweisinger**, Financial Analyst, led CI's first State Controller's Office (SCO) audit. Following the State Controller's Office review of all Operating Fund payments for the 15 months between July 2007 and Sept. 2008, no exit interview was required as there were no findings.
- **Myrna StaAna**, newly promoted Accounts Payable Supervisor, and two Accounting Technicians, **Susan Milligan** and **Leo Cervantes** have maintained excellent customer service to vendors and campus departments by streamlining processes, following the long standing hiring freeze for an open technician position.
- **Eddie Washington** meets with students from Business Law classes each semester, sharing his experiences as an attorney as well as providing legal expertise with regard to discrimination in the workplace.
- **Deborah Wylie** was inducted into the Association of University Architects, Class of 2009. Two noteworthy presentations she has made during the past year include one to the Board of Directors of the Architectural, Construction, and Engineering Charter High School in Oxnard, and another at the 2009 CSU Improving the Planning Process for Utility Projects venue. In addition, her department shared Web Work expertise with Physical Plant staff at Wheaton College, Illinois and with Facilities Management at UC Santa Barbara.

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b. Programmatic successes

Awards:

- Broome Library, American Public Works Association of Ventura County, Project of the Year
- American Society of Civil Engineers of Ventura County, Project of the Year
- Library Journal, Dec 2008 p38-39, Featured Project
- California Construction Journal, Award of Merit for Outstanding Architectural Design
- **Herb Aquino** has led the Infrastructure group to win \$50,000 worth of gear and 6 months post installation support for physical security products from Cisco and NIC Partners, Inc. through a Security Makeover Contest. His team produced a short video about the campus and its need for physical door security. He was nominated and attended the Leaders in Education Awareness Program.
- **Jess Paredes** received the Student Affairs Award of Excellence, along with **Marc Aten**. Marc also placed third in Hawaii's IronMan contest.
- **Brian Pichette** was recognized as a Ventura County "Dispatcher of the Year" for his dedication, passion, and commitment to the profession.
- **Officer Ceci de Soto-Teunis and Deanne Ellison** were selected by their peers as "Police Officer of the Year" and "Employee of Year," respectively.
- **Alisha Leal**, a Police and Parking Service (PPS) student assistant, was awarded \$3,000 scholarships from the Business and Technology Partnership.
- CSUCI was commended by the County of Ventura Board of Supervisors for "Business Work-Life Leadership Award- 2009 Ventura County Family-Friendly Employer."
- CSUCI was awarded the "2009 Ventura County Family-Friendly Employer" by the Advisory Board of the Business Work-Life Alliance of Ventura County.
- Quality Improvement Awards Nominations submitted to the Chancellor's Office were:
 - QI Team of the Year: Jane Sweetland, UPACC subcommittee for Student Access/Retention/Success
 - QI Champion of the Year: Deborah Wylie
 - QI Innovative Practice: Tom Emmens - - "Creating a Poster at CSUCI," located on the Library's Student Services website
 - QI Facilitator of the Year: Dennis Muraoka
 - QI Distinguished Service: Raudel Banuelos
- **Emily Deakin, Missy Jarnagin, and Lacey Lovejoy** was all recognized for their work on the Revenue Management Program as part of the system-wide Quality Improvement Team Award.

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Projects:

Administration:

- Acquisition of Camarillo Regional Park
- Implementation of the Business Continuity Plan software
- Element Coffee Shop opens
- In addition to the arduous external audits, the CSU internal auditors have audited our financial operations, construction projects, information security, and police services. All audits were fairly clean and resolved in a relatively quick fashion.

Information Technology

- Audio Visual standards added in 78 classrooms
- New wireless points installed across campus
- Lecture capture and online collaboration tools launched

Operations, Planning, and Construction

- Smith Center for Integrated Decision Making was completed in April 2009
- Student Union building on target for completion in Fall 2009
- North Hall project construction documents at 95% completion
- Completed Bus Stop relocation, seismic anchoring of server racks in Ojai Hall, installation of shelving in West Hall, and created more usable space in Ironwood Hall.
- Java Hut converted to the Student Engagement and Applied Leadership Center; renovated Athletic Director's office, made Gym improvements
- Developed and installed a HVAC system at Chaparral Hall that included high efficiency particulate air (HEPA) filtration. This enabled faculty to perform tissue culture research.
- Water blast, prime, and finish coat exterior of Malibu Hall Building, exterior south face of Bell Tower, central front of Bell Tower, exterior of Carden School, and inside Bell Tower dome
- Renovated existing space in Sage Hall room 1012 and 1014 into the new Safe Room.
- Yearly maintenance projects completed - Stripping / sealing and finish coating of all hard surface flooring campus wide, Carpet cleaning of all common/classroom/office spaces campus wide. Cleaning of windows and screens campus wide.

Police and Parking Services

- Police Services completed a successful audit of its operation. Approximately 150 "questions" focusing on the department's regulatory compliance were examined. Only six minor findings were discovered (none of which were related to the fiscal services of the parking operation), and all were cleared by the first review date.

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The Division's Value-based Activities:

Innovation

- Operation's, Planning, and Construction (OPC) work orders were completed ahead of schedule than 95% of the time.
- OPC improved the Materials ordering process by incorporating a new WebWork module: "Item Request."
- OPC streamlined issuance of goods through new inventory-tracking program.
- OPC implemented a new process for the daily management of assigned work orders that includes customizable fields.
- A new electronic ticketing, payment, and appeal process for parking regulation violations was launched. This process was the result of collaboration with CSU Stanislaus and one of its auxiliaries - Parking Management Bureau.
- OPC was alerted about the availability of Science Trailers at CSULA, and so arrangements were made for their purchase. Consequently, the trailers were relocated to the CI campus, installed, and renovated in order to meet the research needs, one of the President and Provost's top priorities, of Biology, Chemistry, and Extended Education. Facilities to open in the Fall 2009.

Safety

- Established and implemented an asbestos abatement plan for areas where OPC trades personnel are required to perform work (Ironwood, basements, and crawl spaces). Labeling and monthly inspections were performed in areas where abatement could not be completed.
- Designed and installed welding fume extraction equipment, and engineered/installed basement access gate lifting devices.
- Designed and installed a complete HVAC system into the Shipping and Receiving Department.
- Implemented a PPE (personal protective equipment) Program, protecting electricians and mechanics from all electrical hazards.
- The Fire Safety Education Committee was initiated by Theresa Kocis, the Electric Shop Fire Alarm Specialist, who educates students, faculty, and staff on Fire Safety issues to help ensure safety throughout the campus.
- Installed Computer Managed (CM) locks on balance of classrooms.
- Full compliance was granted to the campus following an inspection by the Ventura County Department of Environmental Health of University hazardous waste management and chemical emergency response preparedness.
- Police Services assumed management oversight of the Building Marshal Program and quickly developed simple yet comprehensive objectives for the initiative. Following equipment purchases and training, the Building Marshals participated in the first ever campus-wide drill that tested the evacuation capabilities in each on-campus facility.
- Police Services re-implemented its K9 program with the addition of Hero and his handler, Officer Dan Borgstrom.

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- Police Services was awarded a \$30,000 grant to upgrade its two-way radio infrastructure located inside the 911 communications center, replacing its 25-year old analog radio.
- The 1st annual Emergency Preparedness Forum was held last year, well attended by students, faculty, and staff.

Service Excellence

- Participated in the Quality Improvement survey process, with six participating areas. Survey results will be used to develop quality improvement projects throughout the Division.
- Dolphin One Card (printing, dining, access) launched
- In response to customer surveys, developed and implemented process for a campus-wide key audit to verify database of keys and codes, facilitating access to all locations. This was the first comprehensive key audit for CSUCI.
- Updated computer maintained (CM) lock software to reduce key and code requests by more than 50%.
- Parking Services has extended its customer service hours.
- Community Service Officer's continue their safety escort/shuttle program

Stewardship

- Reduced facility maintenance costs through critical analysis of preventative maintenance frequencies and cost/benefit analysis.
- The cost of workflow documentation has been reduced by combining individual pieces of equipment into equipment groups, significantly optimizing work order systems by reducing the quantity of work orders.
- Transitioned from monthly time sheets to daily attendance reports on March 1, 2009.
- Nurse Simulation Lab HVAC system was installed. OPC removed the 60-yr old equipment and successfully installed 10 tons of air conditioning, using salvaged equipment to reduce cost.
- Facility Services workers routinely monitor the Infrastructure project to identify landscaping repairs before permanent damage occurs.
- New heavy duty automotive lift purchased and installed, to enable more repairs to be completed on campus to reduce expenses.
- Hosted Budget Brown Bags, Furlough Brown Bags, Finance and Administration Forums, and other session as vehicles to inform employees of the state of the University and to encourage them to modify their spending as appropriate.

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Sustainability

- Implemented energy efficiency measures and cut energy usage by 7-8%.
- All incandescent light bulbs have been eliminated on campus. Old light fixtures are being replaced with new energy saving fixtures, along with controls that utilize ambient light and occupancy sensors, which will result in both energy and money savings.
- Water conserved by distribution of reclaimed water to more areas of campus, with 25% reduction in irrigation to all areas. Additionally, new landscaping fittings have been installed campus-wide to limit water usage.
 - Recycling efforts continue through the efforts of the Facilities staff and the support of Ventura County, which has supplied the campus with recycling containers worth \$18,000. As a result, over the past year, 70% of campus waste has been diverted from landfills.

Teamwork

- Implemented new protocol for Vehicle Use Reports This requires obtaining vehicle reports from all groups with campus vehicles every month.
- United Charitable Campaign was kicked off with "Spooktacular" in October.
- Campus website has achieved 99% ADA compliance.

c. Additional funding/grants obtained, if any

N/A

d. Collaborations with other Divisions

Accounting:

- Student Housing and the University Cashier's office meet to ensure successful semester check-in activities and coordination. Processes have been mapped and improved upon.
- A large collaborative effort by Budget, IT, and the Cashier's Office to re-implement the Student Financial module resulted in data being correctly posted to the general ledger, facilitating automated reports.

Budget

- CSUCI hosted the quarterly CSU Procurement & Support Services Officers Association (PSSOA) conference on November 19 & 20, 2008. The Enrollment Center oriented our guests to the campus by conducting a tour, providing them with a little history and characteristics unique to our campus. They were very impressed by the University's rapid growth in a short time.

IT

Collaborated with:

- OPC to complete MV Smith Business Center
- Procurement and Budget on PC Refresh
- Computer Science Department to integrate into the IT network structure.

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- OPC to automate environmental controls, and provided a fire alarm upgrade.
- Institutional Research to find and implement a data management program.
- Public Safety to implement the Burbee emergency notification system.
- Finance to clean up Student Financial Reporting.

OPC

- OPC interacts with numerous campus departments daily, primarily by providing support services throughout campus. In addition, Planning Design & Construction works closely with groups from Academic Affairs, Student Affairs, and others within the Finance Division, planning all new projects. Recent examples include the facilitation of office relocations during the renovation of University Hall, the construction of surge space in Solano Hall, design and support services for Performing Arts productions, consultation to ensure ADA compliance with temporary commencement structures, and the coordination of parking and traffic revisions as needed during campus improvements.
- In collaboration with Housing and Residential Education (HRE), the process of Student Housing end-of-year repairs was simplified, saving both time and money. This was accomplished by eliminating the cumbersome practice of listing every repair needed, empowering the OPC staff to make all necessary repairs. In the case of excessive, larger repairs, the expenses were charged back to students.
- OPC hosts a weekly 'status meeting' to review and coordinate construction, events, and ongoing academic needs. This meeting is attended by Police, Parking, HRE, Academic Affairs, Student Affairs, Marketing and Communications, OPC Operations, Design & Construction personnel, EH&S manager, IT, Procurement, and the Director of Special Projects. This meeting has ensured timely exchange of information and has aided in congenial community-building.
- Laborers supported 222 campus events this year.
- Working closely with users, Planning, Design, and Construction, and the subcontractors, all furniture installations in Solano Hall and Lindero Hall were successfully coordinated during construction and refurbishment.
- Coordinated with Infrastructure contractor to remove or relocate furniture on specific days in University Hall, University Hall Towers and portions of the Bell Tower to facilitate access by construction crews.

Police and Parking Services

- Police Services collaborated with the Divisions of Student Affairs and Academic Affairs in the form of the Behavioral Intervention Team. Representatives of both Divisions and the Police Department discuss student behavioral issues, planning and implementing interventions as necessary. This team approach to threat assessment has helped to de-escalate behavioral issues that could have otherwise been harmful to campus community.

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- Police Services also successfully collaborated with the Division of Student Affairs on the following initiatives:
 - a. New Student Orientation
 - b. Summer Bridge
 - c. Resident Assistant Training
 - d. Housing Block Parties
 - e. Sexual Assault Awareness Week
 - f. Alcohol and other Drug Prevention Week
- Police Services collaborated with the Division of Academic Affairs on the following initiatives:
 - a. New Faculty Orientation
 - b. Training on "Teaching Troubled Students"
- Transportation & Parking Services has continued its collaborative efforts by working closely with all areas of campus, but especially with the Office of the President and Advancement to coordinate successful special events, both on and off campus.
- Police and Parking Services hosted a presentation for the President's Cabinet and Emergency Operations Center section leaders on "Disaster Vulnerabilities in Ventura County."
- Transportation and Parking Services, in partnership with Student Government and OPC, conducted two parking forums, with approximately 100 individuals in attendance.
- Students at California State University Channel Islands presented 'Every 15 Minutes,' an on campus DUI collision simulation, in March, as a part of Alcohol Awareness Week.

B. Challenges in the Division

a. Anticipated and unanticipated challenges

The President has challenged us all to move forward and advance the institution in the coming year despite the current budget situation. This will prove difficult to achieve in light of the hiring freeze, employee furloughs (and perhaps layoffs in the skilled trades) and other spending reductions. Our first focus is to make sure that people are informed about the situation and to try to keep morale high. These are tough times for everyone and it is all too easy for employees to become bitter and disillusioned. We expect that the State of California budget will get worse before it gets better; whether the CSU budget is further reduced is yet to be seen. We need to encourage our employees to advance our goals while being sensitive to the fact that their work hours have been reduced by a minimum of the 10% salary reduction and could actually be much higher due to many normally exempt employees being subject to the hourly wage laws in the week that they are furloughed.

The budget situation also exacerbates our ability to provide our employees with the training and development activities that they require to excel at their jobs and that help make CSUCI a highly desirable place to work. We continue to make modest progress on

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training, but this is a huge undertaking that needs real money to make it a substantive program. We have also agreed to participate in another "best Places to Work" kind of survey this spring. The campus participated in such a survey a couple of years ago and the results were disappointing. Little was done to improve the situation at that time, so we feel the need to get new baseline information so that the situation can be improved. This time, we will initiate a number of Quality Improvement projects which will focus on survey results.

We have two major capital projects that are just finishing the design phase. California's financial status is so shaky that it is uncertain when it will be able to issue a general obligation bond for the entry road or a lease revenue bond for north hall. Both projects are essential for future enrollment growth. The good news is that construction costs are not escalating like they were in years past; however, we may find ourselves in the position of having more students than we have classrooms to put them in. We are delighted that an athletic plan for the campus is in the works, but concerned about how we will resolve the lack of facilities. This will need to be further explored in the coming year.

While the state budget situation hinders us in many ways, we continue to promote projects or activities that are necessary for our future success. Some of these are must-have activities like University equal employment opportunity compliance and diversity or information security efforts. These two efforts demand large amounts of attention to make them successful, but we have not had sufficient resources in the past. We now have some committed resources to the former, but little to the latter. The overall programs will be designed this year along with detailed plans to move forward.

The campus will contract with University Glen so that the Glen takes the lead with food service on this campus. They will provide self operation of food service to the Student Union in the spring 2010. At this time we have a variety of contract mechanisms in place for all food on campus and in the Glen. The Glen will organize an overall plan to provide the highest quality food at a reasonable price while making it easier for each of the venues to be profitable.

b. Issues that need to be addressed in the future

The current year state budget fiasco has forced some actions that we would prefer not to do. Parking services has picked up incremental costs related to the bus which will eat up their reserves in short order. They will be hard pressed to finance the next parking lot until the student enrollment grows. Our parking fees are already higher than many campuses in the system. We remain concerned and on alert with respect to both the Student Union and the Student Housing. We will need to be creative with the Student Union so that Associated Students Inc will be able to pay its debt service. In terms of student housing, we expected to be oversubscribed this year and that did not happen as a result in the decline of student enrollment growth. While Student Housing reserves are adequate to meet any short term losses, we are concerned that when our student enrollment grows significantly we will not be able to expand our housing stock quickly

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enough to meet our needs. A strong relationship with University Glen should help us get through any surges that we might have.

C. Division Operations

a. A summary of the division's FY08 finances, explaining any significant variation between expenditure and budget

Summary of budget-significant variations:

	2008/2009 Budget	Actuals	Budget Balance Available
VP	574,823	499,462	75,361
Cost Recovery	(586,824)	(865,566)	278,742
Finance	2,039,201	1,993,998	45,203
Human Resources	2,444,198	2,206,161	238,037
Operations Planning & Constr	10,227,523	9,199,953	1,027,570
Public Safety	2,328,978	2,209,747	119,231
IT	4,616,659	4,333,652	283,007
	<u>21,644,559</u>	<u>19,577,408</u>	<u>2,067,150</u>

During FY0809, the Division implemented the campus-wide budget reduction requirements by keeping vacant positions open, reducing travel, and restricting non-essential purchases. Each manager worked to reduce those costs in their areas, reflected in the budget balance as of 6/30/09. In addition to the required reductions, the Division also decreased utility costs, totaling \$630,000, and received \$275,000 in excess Cost Recovery funding.

b. Projected budget needs for the next two years

Finance and Administration, exclusive of Information Technology (IT), has taken some of its largest campus-wide budget reductions in the recent past, while preserving IT to the maximum extent possible. The balance of this section refers only to Finance and Administration, not IT.

In FY0809, the campus reduced its base budget on a one-time basis by \$1.275M. The Division's share of this cut was 57% or \$725K. After receiving final budget allocations from the Chancellor's Office, the cuts were partially returned to Divisions, leaving \$875K in one-time cuts. Finance and Administration's share of the remaining cut from 0809 was 63% or \$550K. In addition to these one-time cuts, the Division will be shifting some costs to other funds to help defray the large cuts in FY0910, including moving a portion of the bus costs (\$135K) to Parking. University Hall will remain closed during FY0910, with current occupants in the two towers slated to move to Solano Hall. With this, along with other expected savings in energy management programs, the campus expects to save approximately \$300K in utility costs.

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While the cost-savings measures are looked at as potentially long-term savings for the campus, the other cuts are one-time. Coupled with open positions (\$592K), this leaves Finance and Administration at \$1.543M below the FY0708 funding level.

c. Proposed Staff Changes

The Division currently has open positions that will not be filled during the FY0910 fiscal year. These cuts total \$592K, or 8 FTE's.

These open positions include:

Finance:

Accounting Technician 1 FTE

Financial Analyst 1 FTE

Operations Planning & Construction:

Electrician 1 FTE

Manager 1 FTE

Warehouse Worker 1 FTE

ASA 1 FTE

Public Safety:

ASC 1 FTE

Police Office 1 FTE

These proposed staffing changes only get us back to previously approved budgets, and do not reflect additional staffing that will be required to meet any new or expanded organizational needs. These open positions and the need for additional positions, will make it difficult to meet required deadlines, and will be a challenge for Risk Management, Information Security, and the general overall support of campus functions/activities.

d. Staff Development activities during the previous year

- A Division-wide All Hands meeting was held on Monday, June 29, with 170 attendees. Information on safety and sustainability was shared, as well as updates on business continuity planning, the budget, and the Division's 2008-2013 strategic plan. In addition, the proposal of a Division-wide rewards and recognition program was well-received, and so a nominating committee was formed, tasked with its development. Further, meeting participants were encouraged to join a 10 week health and wellness program, titled "Walk across America." Teams have been organized, competing to see which will walk the farthest. The entire campus community has been invited to join.
- Process mapping training provided by representatives from the Chancellor's Office was held for approximately 20 campus' "Subject Matter Experts."
- The Accounts Payable Lead person provided two training sessions, with about 30 attendees at each one. Feedback suggested that the training was very much appreciated.
- Two CSUCI Supervisor and Leadership Training sessions were attended by about 38 managers and supervisors.

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- Human Resources Programs coordinated a successful New Employee Orientation with 27 participants.
- CSUCI was one of three CSU's participating in the Security Awareness Training Pilot Program, which was completed March 3, 2009. Comments were positive, with participants reporting that the training was easy to navigate, and informative
- Over 322 training sessions were held in OPC, amounting to an estimated 1200 hours of training. These workshops included such important topics as Back Safety, and Fire and Life Safety.
- Community Service Specialists Dawn Smith and Cherylanne Dooley have become Police Officer Standards Training (POST) certified dispatchers and have been trained to supplement the permanently assigned staff. Their development has improved the capability of the Police Department to provide E911 services to the community.

D. CSUCI Mission Statement and the 4 pillars: how division programs and services are meeting these.

- a. *Interdisciplinary Approaches*
- b. *Multi-Cultural Perspectives*
- c. *International Perspectives*
- d. *Community Engagement/Service Learning*

Our Division takes a support role in most everything that happens on campus. When we look at the campus's strategic plan we believe that we generally contribute to the 3rd General strategy of "continue developing innovative practices that enhance the quality and effectiveness of the University including academic programs, student support services the business enterprise and physical infrastructure." Our Division Mission statement states:

The Division of Finance and Administration supports the mission of the University by providing the highest quality service while practicing responsible stewardship of the University resources.

Our Vision statement states:

We strive to be proactive in all our areas of responsibilities while building the infrastructure and systems. This requires planning and preparation while being responsive to on-going needs.

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E. Goals

Our goals continue to fall within 4 overarching categories:

- Infrastructure – provide facilities and infrastructure to meet University enrollment growth
- Organization – develop organization and support systems that meet the demands of a changing and growing university
- Environment – enhance a sense of community that provides for collegiality, sustainability, and a safe environment for student learning

In the past year we have concluded the goals identified in our 2005-2010 Strategic Plan. A document which identifies each of our goals and their status is included in **Appendix A: 2005-2010 Strategic Plan outcomes.**

A summary of our strategic plan and goals for the upcoming years is included in **Appendix B: 2009- 2014 Strategic Plan**

Appendix C: University Glen Corporation includes the highlights from University Glen which is integral to our Division, but has not been included in any of the preceding document.

Appendix D: is an updated **Organizational Staff Chart** (include student staff)

Division of Finance and Administration Annual Report

Appendices

Appendix A

2005-2010 Strategic Plan Outcomes

Goals	Objectives	Person(s) Responsible	Status as of 2/1/2009	Challenges and/or Proposed Actions for FY09/3rd Qtr.	2009-2014 Strategic Plan
Infrastructure: Provide facilities and infrastructure to meet University enrollment growth	Make public transportation more convenient and easily accessible: including working with Ventura County Transportation commission over 24 months to increase ridership; studying alternate work schedules and operations needs; and promoting the Rideshare Program	John Reid/Ray Porras	A Rideshare Coordinator has been designated; there has been a comprehensive effort to encourage the use of alternative means of transportation, including the use of busses, carpooling, and bicycling. Results indicate that use of these other forms of transportation are on the rise.	Transportation staff is researching the viability of a zipcar.com program for the campus community.	Transportation in general
	Develop a long term infrastructure Master Plan including facilities and technology for a 10-15 year time-frame by July 2006. IT-specific: Applications Solutions Group; Upgrade Oracle, Implement CO-mandated modules, develop web portal for students, reorganize staffing, collaborate with departments to maximize value from PeopleSoft; Infrastructure; improve security, develop plans for green data, complete IT governance , complete server consolidation virtualization project, investigate server software upgrades IT User Services; Upgrade Trackit, improve desktop security, automate desktop management, provide more self-help for users, improve tech literacy on campus, hire Accessible technician to assist students, implement best practice intelligent learning; Academic Technology Services; Evaluate Learning Mgmt. System, support 508 compliant instructional materials, maintain 508 compliance of 95% of web pages, evaluate and adopt Web Content Management System, improve access of University website content, staff training about accessibility; IT Admin, provide stewardship of resources, hire Information Security Officer, convene information	Deborah Wylie/IT	Completed, but also on-going ; IT, ASG, IT User Services, Academic Tech. Svcs, IT Admin goals met	Completed	Academic Technology Services: Blackboard and Web content mgmt. system evaluation continuing; IT Administration. Strategic planning; hire Information Security Office, public service/community engagement

Goals	Objectives	Person(s) Responsible	Status as of 2/1/2009	Challenges and/or Proposed Actions for FY09/3rd Qtr.	2009-2014 Strategic Plan
Infrastructure: Provide facilities and infrastructure to meet University enrollment growth	Request a prioritized Bi-annual Report from all Divisions, but most especially from Academic Affairs, regarding their needs (more classrooms, student housing, etc.) which will assist Finance & Administration in space and infrastructure planning.	Deborah Wylie	Deborah sits on the Academic Planning Committee so that she can be attuned to the needs of Academic Affairs.	Responsive to requests, however there may be opportunities in anticipating needs. Completed	
Organizational: Develop organizational and support systems that meet the demands of a changing and growing University.	Assess Finance & Administrations support of the University mission through the development of an assessment model such as surveys and/or benchmarking; identify and make recommendations for staff support. Each department should conduct an organizational review at least once every four to five years.	Caroline Doll	Surveys are conducted annually through the Chancellor's Office. Employee survey completed last spring, Best Places to Work. "AIM" pilot approved.	Results of Best Places survey indicate lowest scores reflect a desire for equitable pay, additional training, and the sense of not being valued. Highest scores reflect that employees are always looking for better ways to do their jobs. Continue w/ annual surveys. Surveys conducted through Chancellor's Office being finalized now, and will be distributed in April. Final scores due in July.	
	Prepare written Standard Operating Procedures for each department to assist in training. Procedures should include guidelines for communicating processes between departments, etc.	All	Police Department & University Glen completed; Procurement ready to go on-line; Human Resources /Accounting have a few; Finance and Administration will use Standard Operating Procedure Policy format. IT in progress	Continue as part of routine business	
	Communicate ideas to allow for fresh perspective from other areas. Post information about large projects, so the campus community is well-informed of same. Develop Division web page by December 2006 which includes this information.	All	Operations, Planning and Construction (OPC) posts projects weekly. Accounting, procurement, Police Department, Human Resources and others all communicating		

Goals	Objectives	Person(s) Responsible	Status as of 2/1/2009	Challenges and/or Proposed Actions for FY09/3rd Qtr.	2009-2014 Strategic Plan
Organizational: Develop organizational and support systems that meet the demands of a changing and growing University.	Implement and automate work order systems (OPC & IT) to let requestors view project status and timelines on these projects.	Deborah Wylie/ Judy Frazier	Work order system is automated; projects are detailed and therefore requestors can personally inquire about status rather than view on-line. Investigating and implementing environmentally sustainable practices such as consolidating printers, using virtual servers.	All web applications must comply w/ ATI initiative, mandating computer access for disabled, limiting resources to fully implement a more sophisticated automated work order system. Ongoing, part of culture.	
	Review processes; schedule group meetings to discuss and communicate information on effectiveness of in-place processes and systems. Department group meetings and/or reviews will be conducted twice a year during the strategic plan years.	All	Dolphin One Card has been implemented, increasing efficiency in meal service - more departments to be added.		Some form of this objective will be carried into next strategic plan
	Schedule staff "open houses" (2 hour) in all Finance & Administration departments by May 2006, to improve understanding of each department's work, processes, and workflow.	All	Though not formally labeled as "open houses," the Finance and Admin Forum, New Employee Orientation, and Residential Assistant training fulfill the objective.		Some form of this objective will be carried into next strategic plan
Environment: Enhance a sense of campus community that provides for	Schedule brown bag lunch meetings highlighting specific topics, such as: the functions of the Finance & Administration departments, specific responsibilities of key personnel, major issues encountered by departments, and issue resolutions	All	Finance and Administration Forum, Budget Brown Bag. One more Brown Bag to be scheduled in Spring, 2009, or as needed.		Community building will continue, with structured employee rewards/recognition, applauding those employees who exemplify CSUCI's general strategies and values. An All Hands meeting is being planned to introduce 2008-2013 strategic plan.

Goals	Objectives	Person(s) Responsible	Status as of 2/1/2009	Challenges and/or Proposed Actions for FY09/3rd Qtr.	2009-2014 Strategic Plan
collegiality, sustainability, and a safe environment for student learning	Schedule bi-annual nighttime campus "walk-about" with faculty, staff, and students to identify safety issues, increase awareness, and add a sense of safety.	Deborah Wylie/ John Reid	Community service officers walk the campus nightly, checking on lighting, emergency phones, etc. Deborah conducts a walk-about once each semester, which has resulted in updated lighting, tree trimming to enhance nighttime vision, and monitor/repair potholes.	Completed, part of campus culture.	
Environment: Enhance a sense of campus community that provides for collegiality.	Maintain and increase recycling efforts. Educate the campus about recycling efforts. Review annually to determine needs or changes.	Deborah Wylie/ Raudel Banuelas	New Resident Assistants are oriented during "Boot camp" to increase their awareness of recycling opportunities through a fun activity where strips of paper tossed in a hard hat are drawn by participants containing interesting recycling "factoids." Efforts by members of her staff have diverted over 70% of university waste from landfills. Collaborating w/Ventura County, CSUCI was awarded a \$18,000 grant to purchase recycling containers.	Completed/on-going	

Goals	Objectives	Person(s) Responsible	Status as of 2/1/2009	Challenges and/or Proposed Actions for FY09/3rd Qtr.	2009-2014 Strategic Plan
sustainability, and a safe environment for student learning	Expand OPC safety training for short presentations on safety awareness to all departments within the division.	Deborah Wylie	There is a safety coordinator within OPC who conducts all training about back safety, PPE, respirator tests, making sure that proper shoes and gloves are used, etc. Safety Coordinator works with Dir/of Environment, Safety & Risk Mgmt re hazmat concerns.		Campus-wide safety focus to include areas outside of OPC
Resources: lead University efforts in responsible stewardship that maximize the use of limited resources	Use Process mapping, as applicable, or benchmarking methods to increase efficiency. Each department will conduct a review at least once every four years	Caroline Doll/ Pamela Abbott-Mouchou	Dolphin One Card has been implemented, increasing efficiency in service.	Opportunities exist for the expanded use of the Dolphin One Card.	Continue
	Study opportunities for group contracting through Master Enabling Agreements with other campuses. A review of contracts would be conducted twice a year.	Missy Jarnagin/ Valerie Patscheck	Contracted services are reviewed with regularity. CSU website offers opportunities for CSUCI to "piggyback" with other CSU contracts to enhance savings opportunities.	Completed	
	Scope capital improvement projects for permanent solutions and long-term durability rather than expediting projects; educate those campus constituencies that are involved in such projects. This scoping or review will be conducted once per year.	Deborah Wylie/ Dave Chakraborty	Each week a multidisciplinary meeting is held with attendees from OPC, Student Housing, Academic Affairs, and Student Affairs. Progress is evaluated once each month.	Completed	

Division of Finance and Administration Annual Report

Appendices

Appendix B

2009-2014 Strategic Plan

CSUCI Division of Finance and Administration
Strategic Plan 2009-2014

CSUCI Strategic Initiative: Continue developing innovative practices that enhance the quality and effectiveness of the University, including academic programs, student support services, the business enterprise, and physical infrastructure.			
Mission Statement: The Division of Finance & Administration supports the Mission of the University by providing the highest quality service while practicing responsible stewardship of the University resources.			
Divisional values include: Innovation, safety, service excellence, stewardship, sustainability and teamwork			
Goals:	Objectives	Action Plans	Departments Responsible
Infrastructure: Provide facilities and infrastructure to meet University enrollment growth.	Update Physical Master and Information Technology Strategic Plan	Coordinate with stakeholders (AA, SA, FA, Advancement, Athletics) to include needs for enrollment growth and program growth	OPC & IT
		Identify processes and facilities upgrades to improve services for student, faculty, staff, and ADA requirements	
	Improve access to campus services	Improve campus transportation and parking options	T&P
		Research options for alternative transportation; parking options; funding options to reduce single vehicle trips and improve campus-to-community transportation.	
	Improve partnership benefits to campus from University Glen	Implement program to accommodate the online purchase of parking permits	T&P & IT
		Assess construction re-start of additional phases; explore options for development of research park	U Glen
Organizational: Develop organizational and support systems that meet the demands of a changing and growing University.	Quality Improvement:	Improve customer services through the expansion of the uses for Dolphin Card.	Budget, IT & UGC
		Create a culture of quality improvement through the development of framework and common language to guide assessment, planning, and improvement across all departments within the Division.	Administration
		Use process mapping to quantify work flow processes and where appropriate, create, modify, or eliminate policies and procedures.	
	Safety (Emergency preparedness, Training, and Business Continuity Planning	Improve the campus emergency notification systems to possibly include texting, outdoor signage, digital signage and improve upon our existing voice mail notifications.	Police & IT
		Update the campus Emergency Operations planning by using all the latest Federal, State & CO requirements	
		Complete and test business continuity plans.	Administration
		Provide Personal Emergency Preparedness Information sessions for students, faculty, and staff.	Police
		Improve information security practices and educate campus.	IT

CSUCI Division of Finance and Administration
Strategic Plan 2009-2014

CSUCI Strategic Initiative: Continue developing innovative practices that enhance the quality and effectiveness of the University, including academic programs, student support services, the business enterprise, and physical infrastructure.			
Environment: Enhance a sense of campus community that provides for collegiality, sustainability, and a safe environment for student learning.	Strengthen relationships with employees and community	Develop and implement employee rewards and incentive program that supports employee growth and retention.	All
		Research and implement low/no-cost programs to support employee wellness.	HR
		Enhance sense of campus community (and support employee wellness) by organizing teams to participate in community events i.e.: Relay for Life.	
		Develop support system for Managers and Supervisors by giving them the tools they need to do their jobs more effectively thus enabling HR to focus on other University priorities.	
Resources: lead University efforts in responsible stewardship that maximize the use of limited resources.	Promote Energy Efficiency, Alternative Energy Sources, and Water Conservation	Implement aggressive energy management policy to include power, water, trash, etc.	OPC
		Research and utilize alternative energy sources such as PV cells, fuel cells and wind turbines.	
		Convert entire gas/diesel-powered fleet to E-85 fuel or electric fleet.	
		Initiate actions to reduce carbon footprint of the campus	
	Provide high level of service to CSUCI and University Glen residents.	Develop agreements to provide ACH services for payment of Common Area Maintenance Fees and Rent.	U Glen
		Increase and maintain a high occupancy level within the rental community of 90% or more.	
		Decrease homeowner turnaround.	
		Manage food services operations on campus and provide cash surplus back to the campus.	

Division of Finance and Administration Annual Report

Appendices

Appendix C

University Glen Corporation



University Glen Corporation
45 Rincon Drive, Suite 104-A
Camarillo, California, 93012

805-437-2670 Office
805-437-2681 Fax

University Glen Corporation
2008-09 Annual Report

Executive Summary

UGC is responsible for the for-sale and rental properties on the East Campus and provides property management functions to the 658 housing units and 30,000 square feet of retail space in University Glen.

Purpose

UGC, as an auxiliary of the CSU-Channel Islands campus, was created to support the educational mission of the University. Additionally, UGC serves as the agent for the CSUCI Site Authority.

Objectives from 2008-09

- To develop and implement a marketing plan to assist the for-sale housing program.
Project Status: completed.
- To increase the rental program occupancy level through aggressive leasing and staying below Market on the rental rates. *Project Status: occupancy levels due to market conditions were lower than expected during 2008-09. Due to lower market rates in the community University Glen also reduced rental rates.*
- To continue to provide outstanding support to the Homeowners Advisory Council.
Project Status: ongoing and input from the council indicates we are very successful in this area.
- To work with the Homeowners Advisory Council to develop a Common Area Management Budget for Calendar Year 2009. *Project Status: completed.*
- To open 4 retail spaces in the University Town Center that are currently leased including, Tortillas Grill and Cantina, The Market, Copy Center Too and Round Table Pizza. *Project Status: Round Table Pizza terminated their lease due to the economy, Copy Center Too! changed their name to Coast Copy Center and expects to open September 2009.*
- To continue efforts to lease the last two spaces in the University Town Center. *Project Status: the effort continues, the challenge is the fact the space is unimproved and potential operators can go to other locations in Ventura County with improved space or take over leases for completed spaces.*
- To complete the Phase IC Pool Project and open the pool for resident use. *Project Status: construction started and the project is expected to be completed January 2010.*
- To unveil the new UGC Webpage. *Project Status: completed.*
- To continue efforts with CalPERS retirement to approve UGC's application for retirement benefits. *Project Status: CalPERS denied an application and UGC is currently working with another vendor on retirement program options.*

- UGC provides CSUCI faculty and staff with below market rental rates and a recently implemented Rental Incentive Program that further reduces the rental rates for CSUCI faculty and staff. Additionally, UGC works with Extended Education to provide reduced rental rates for their international students who are in approved academic programs. Total financial impact is estimated to be \$72,864.
- Successfully partnered with Department of Public Safety to co-sponsor Safety Day in University Glen.
- Effective July 1, 2009 all operations and management of the CSUCI Site Authority was transferred to the campus.
- Installed 3 Code Blue emergency phones in the Town Center.
- Successfully negotiated lease with Verizon to place cell antennae on the roof of the Town Center. Construction to begin October 2009.
- UGC opened a new conference room that is routinely used by various CSUCI departments at no charge.

Challenges

- The real estate market has been an extreme challenge for both the for-sale and rental properties.

For-Sale Properties

- As the market price of homes in the communities continues to drop, the price gap from Market to University Glen is getting smaller.
- We are receiving the highest number of Letters of Intent to sell since University Glen opened in 2002.
- The escrow period has lengthened from under 60 days just 1.5 years ago to over 90 days today.

Rental Properties

- There is a negative impact to the rental program as well. Historically, University Glen has charged Actual Rent below Market Rent. The gap between these two figures is closing.
- Occupancy is at an all time low this year. This year University Glen has experienced an 80% occupancy level and at times went below that figure. Next year's budget, for the first time, is projected at an annualized rate of 82%.

Objectives for 2009-10

- To increase the rental program occupancy level through aggressive leasing and staying below Market on the rental rates.
- To continue to provide outstanding support to the Homeowners Advisory Council.
- To provide a food service program for the new Student Union Building.
- To provide food services for the meal plan students effective August 2010.
- To work with the Homeowners Advisory Council to develop a Common Area Management Budget for Calendar Year 2010 and 2011.
- To work with the Site Authority to revise the construction budget for Phase 2A/B to determine when the final 242 homes of the project can be restarted.
- To continue efforts to lease the last four spaces in the University Town Center.
- To complete the Phase IC Pool Project and open the pool for resident use.
- To develop and implement a retirement program for UGC.

Appendices

None

University Glen Corporation
June 2009

California State University
Channel Islands

California State University
Channel Islands Site Authority

University Glen Corporation
Board of Directors

Board of Directors:
* Joanne Coville, Treasurer, 5/10
* Dr. Beatrice deOca, 5/12
* Dr. Jacquelyn Kilpatrick, 5/10
* Student Rep- Vacant, 5/12
* Bill Robe, Chairperson, 5/12
* David Press, 5/11
* Dr. Barbara Thorpe, Secretary, 5/11

Homeowners Advisory Council:
* Beverly Dressell, 5/11
* David Carlson, Chair, 5/10
* Dr. Cecilia Travick-Jackson, 5/10
* Dr. Tiina Ikonen, 5/11
* Dr. Eric Tsohalis, 5/10

University Glen Homeowners Advisory Council

Executive Director
Dr. Erik Blaine

Administrative Support Coord.
Ruben Rodriguez

Research and Development Park
Organization, staffing and reporting
relationship to be determined at a later date.

Housing and Town Center

Facilities and Operations

Real Estate

Administration and Finance

Director of Housing
Stephanie Barbabosa

Director for Facility Services
Mike McConnell

**Vice President for Sales and
Marketing / Broker**
Carol Cory

Director of Administration and Finance
Vacant

Leasing Manager
Emma Ashley

Leasing and Customer Service
Ameerah Armstrong

Leasing and Customer Service
Paul Paredes

Leasing and Customer Service
Vacant

Seasonal Temp Help

Senior Facilities Worker
Jay Travers

Facilities Worker
Manuel Vargas

Facilities Worker
Leticia Linthorp

Laborer
Jose Bedolla

Laborer
Jose Luis Arevato

Laborer
Mario Lara

Laborer
Joey Lopez

Administrative Support Coord.
Ruben Rodriguez

Coordinator of Technology
Vacant

Office Staff
Vacant

Office Staff
Vacant

Mgr of Human Resources
Vacant

Accountant
Vacant

Accountant
Vacant

Accounting Technician
Colleen Keene

Approved By: 
Bill Robe, Chairperson
University Glen Corporation Board of Directors

Date: 8/20/09

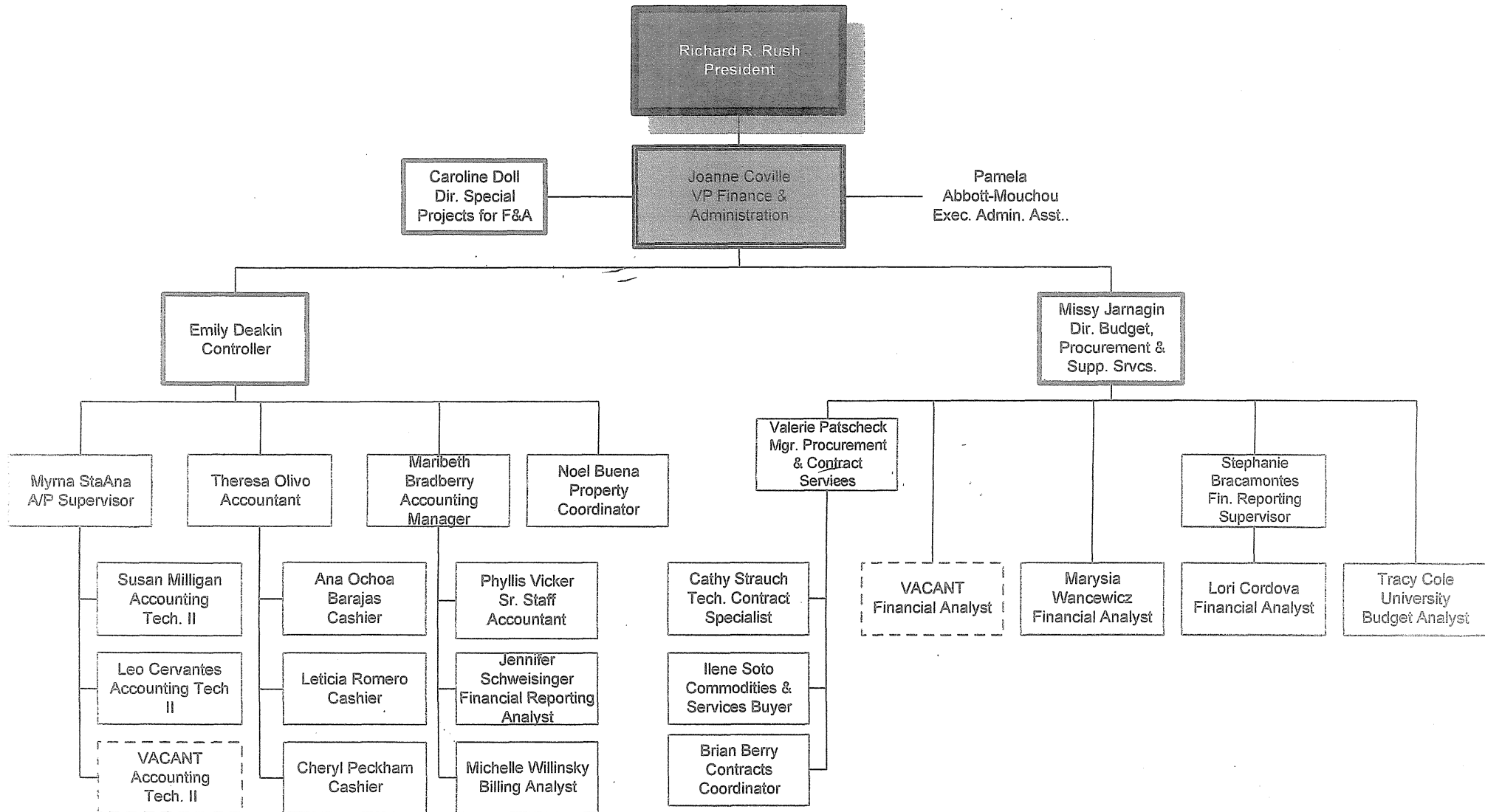
Division of Finance and Administration Annual Report

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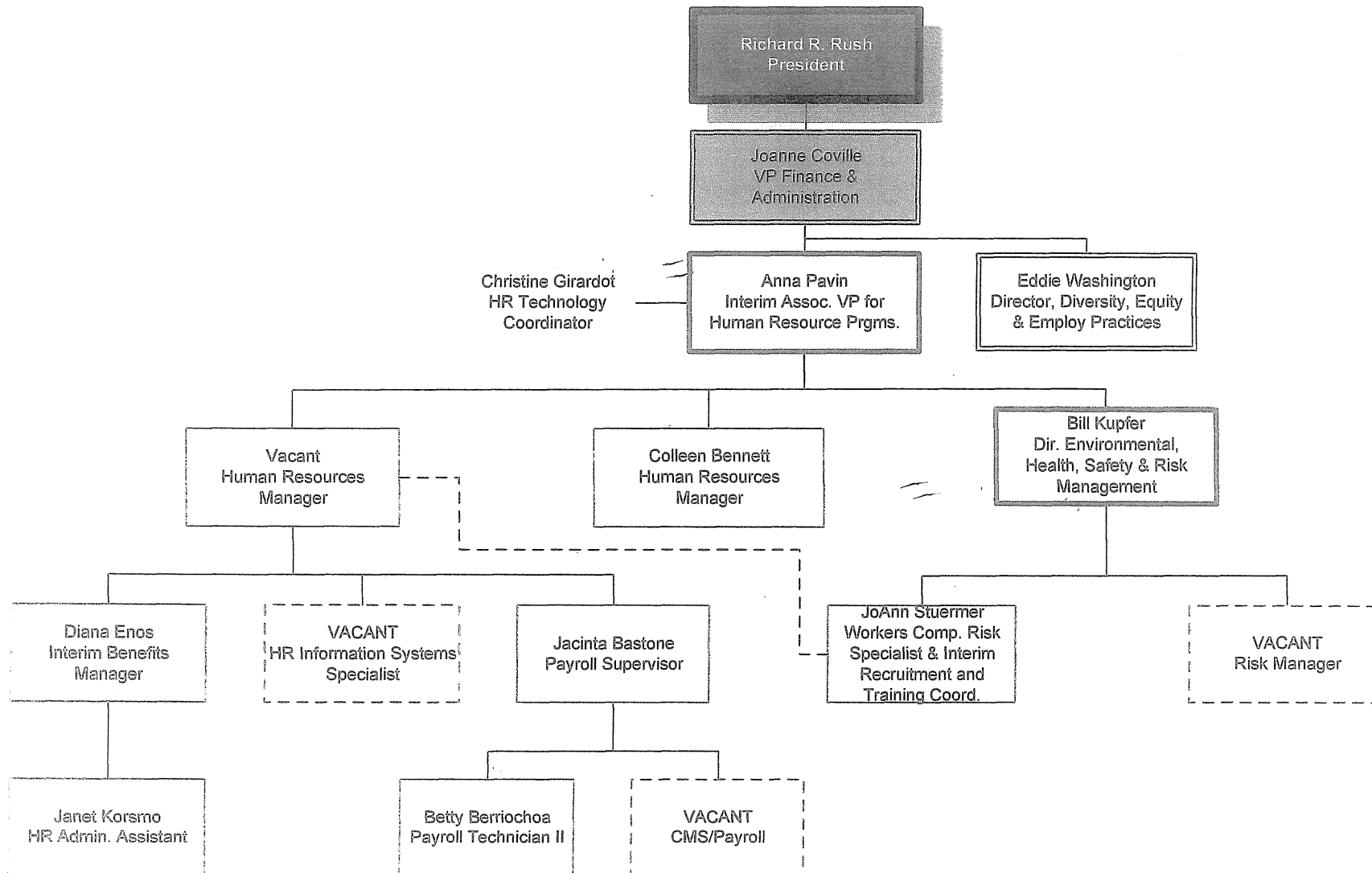
Appendix D

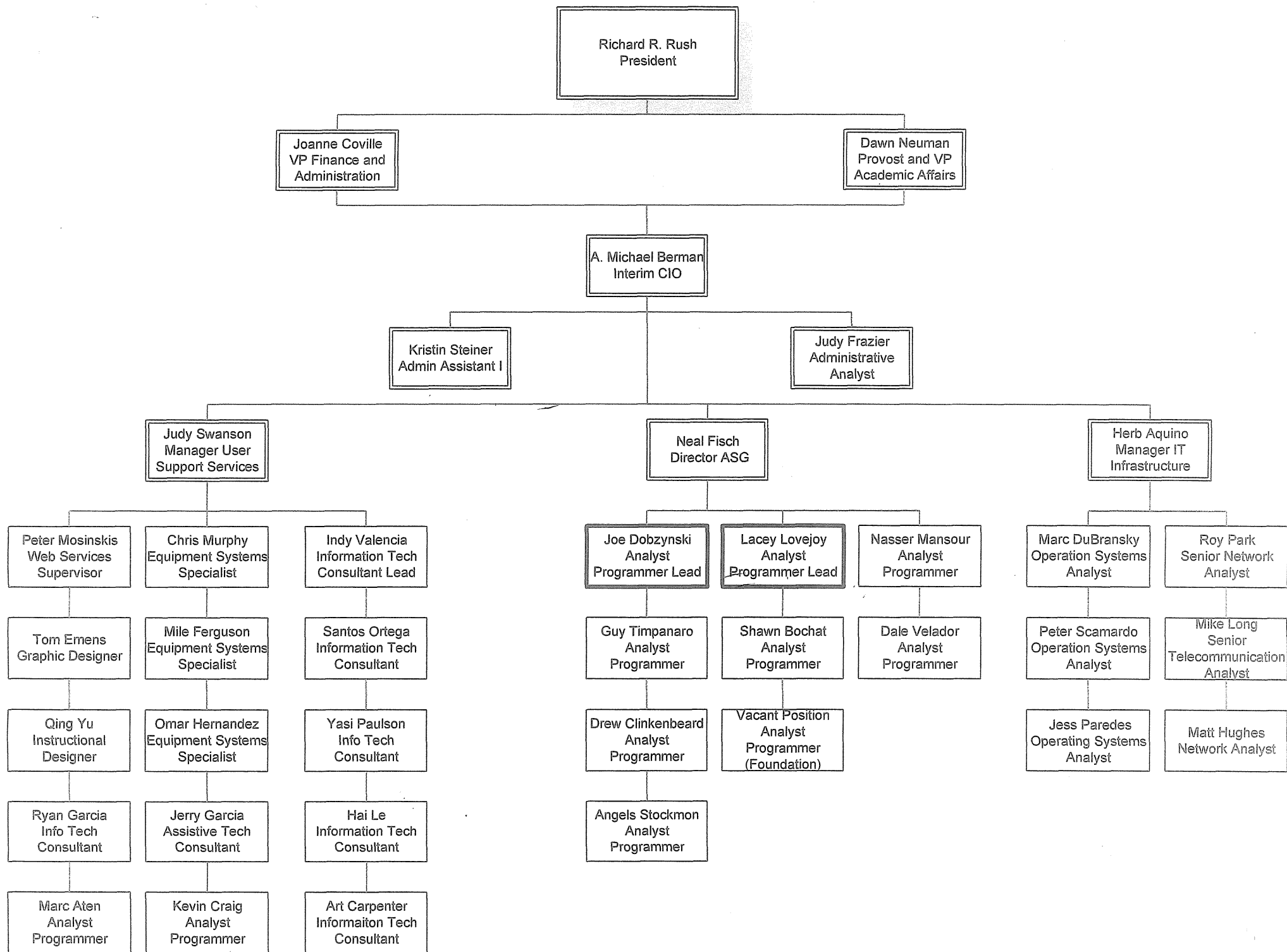
Organizational Staff Charts

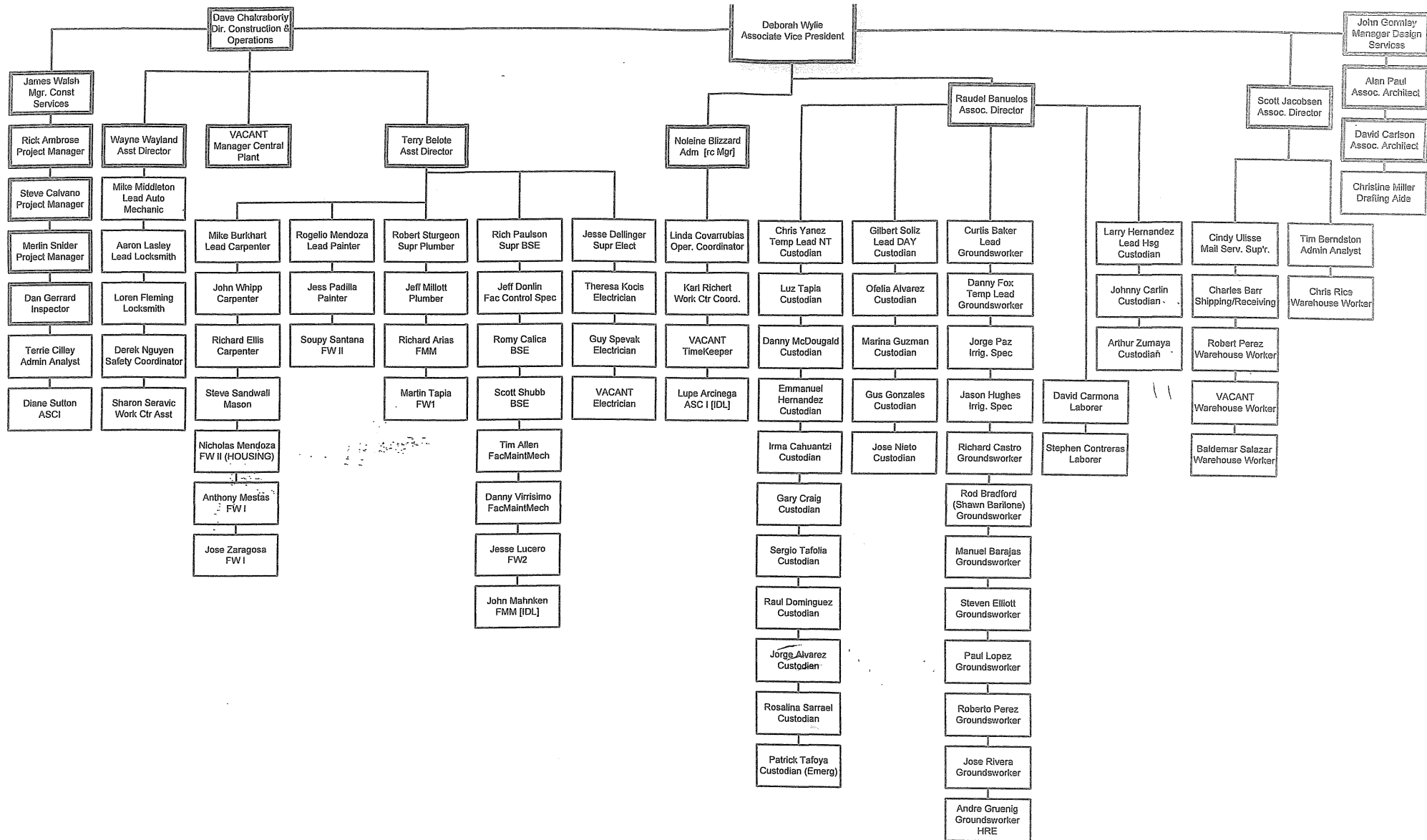
California State University Channel Islands
Division of Finance & Administration
Finance



California State University Channel Islands
Division of Finance & Administration
Human Resources







CI Police and Parking

07/01/2009

