

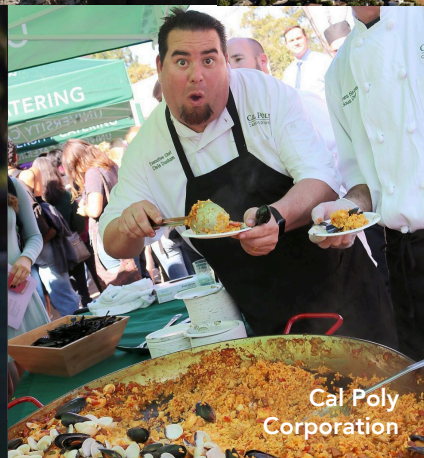
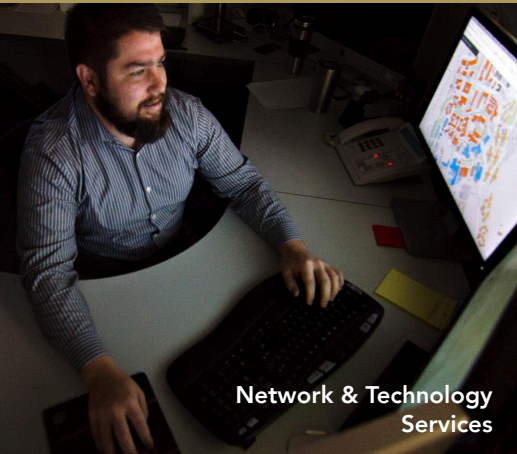


ANNUAL REPORT

Administration and Finance 2017-18

CAL POLY
Administration & Finance

SUMMARY



Throughout the 2017-18 academic year more than 300 Administration and Finance employees worked in collaboration to create a new Strategic Plan. Transformative and forward-leaning, the plan established ambitious goals through six strategic directions. This Annual Report highlights just a few specific accomplishments that A&F achieved this past year. The A&F Strategic Plan provides a foundation for alignment to enhance Cal Poly's reputation as a world-class institution.

STRATEGIC DIRECTION #1

Provide effective and innovative stewardship of institutional assets and resources.



Cal Poly Corporation's \$5 million gift to the Science and Agriculture Teaching and Research Complex was the largest contribution in its history and will support research labs and technology space for three colleges.

Contracts and Procurement has consistently received the Excellence in Procurement award, making the office one of the most notable within the CSU. This prestigious award is earned by universities who exhibit measurable innovation, professionalism, productivity, e-procurement, and leadership attributes.



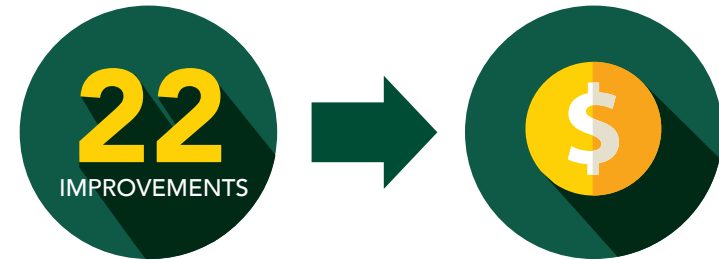
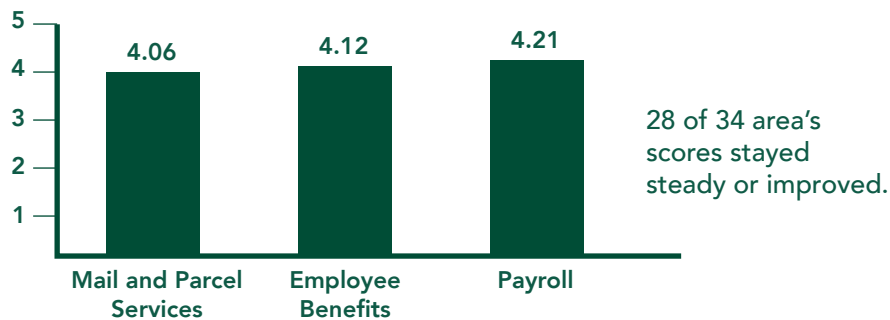
Started implementation and adoption of six new software platforms, including PageUp, Planon, Concur, Questica and SumTotal that will streamline business processes, increase customer satisfaction, provide cost savings and advance the university.

STRATEGIC DIRECTION #2

Create a culture of world-class service.

A&F CUSTOMER SATISFACTION SURVEY

15 areas received improved scores



CREATING A MORE EFFICIENT CAMPUS

Completed 22 lean process improvement projects, resulting in saved time and money all while increasing staff satisfaction.



BUILDING TRUST AND TRANSPARENCY ACROSS CAMPUS

by meeting the growing demand for information and services related to all benefit options and services.



SUCCESSFULLY MANAGED SEVERAL PROTESTS

and large events that had potential for campus disruption, allowing activists to successfully demonstrate with limited disturbance. As a result no arrests, property damage or physical violence occurred.

STRATEGIC DIRECTION #3

Attract, develop and retain a diverse and talented workforce.



Supported facilitative leadership and safety training for 33 custodial, landscape and tradeshop leads. The first time this training has been provided to bargaining unit supervisors and leads.

Welcomed 181 benefited employees with voluntary monthly New Employee Orientations, a 78 percent participation rate. Of the attendees, 99 percent felt more welcome and supported.



Streamlined the talent acquisition process and hired 12 executive staff using an internal recruitment team, saving the university \$685,475.



STRATEGIC DIRECTION #4

Engage, partner and collaborate.



Realized cost savings

Implemented the *Procure to Pay* program campuswide, saving the university approximately \$8 million through various sourcing measures specifically related to facilities/construction, information technology and athletics.



Increased efficiency

Responded to campus feedback and sped up payments from a 40-day to 10-day turnaround (a 75% decrease).



Advanced university image

Provided leadership at the CSU level in the areas of police services, finance and administration, procurement, auxiliary services and emergency management.



Reduced food insecurity

Created the *Mustang Meal Share* program in collaboration with Student Affairs, enabling students to help their fellow Mustangs.

STRATEGIC DIRECTION #5

Create a safe, vibrant and attractive campus environment.



Reduced the number of Workers' Compensation claims by 17 percent since 2016 and by 40 percent since 2015 due to increased health and safety training.

Completed the construction of the \$4.8 million Doerr Family Field, created the 60,000-square-foot Oppenheimer Family Equine Center, and increased the capacity of Baggett Stadium to 3,138.

Completed work on the multi-year Utilidor project to increase efficiency of the hot water system and continued work on the new state-of-the-art Vista Grande Dining Complex.

Opened the Emergency Operations Center five times to effectively mitigate and respond to potentially volatile events including a fire, asbestos leak, the Free Speech Panel event, and a number of campus protests.

Implemented new parking strategies to reduce overcrowding in parking lots as the number of available parking spaces decreased. Strategies included the First-Year Resident Parking Policy and assigned parking for commuter students.

STRATEGIC DIRECTION #6

Make sustainability a core part of Cal Poly and A&F culture.



RECOGNIZED WITH EIGHT AWARDS

for Cal Poly's sustainability efforts including raising awareness of alternative transportation options on campus.



COMPLETED 18.5 ACRE SOLAR FARM

that now generates a quarter of the campus's electricity; achieving significant cost savings.



LOWERED WATER USAGE 35 PERCENT SINCE 2015, saving the university nearly 160 million gallons of water.



BROUGHT THE UNIVERSITY CLOSER TO ITS ZERO-WASTE GOAL

by composting 230 tons of food scraps and coffee grounds, switching to paper straws and offering Eco-To-Go food containers.

2017-18 ANNUAL REPORT ADDENDUM

Cynthia Vizcaíno Villa
Senior Vice President
Administration & Finance

Strategic Direction #1

Provide effective and innovative stewardship of institutional assets and resources.

ACCOMPLISHMENTS

1. Cal Poly Corporation's board of directors approved a \$5 million contribution to the Science and Agriculture Teaching and Research Complex, the largest contribution in the history of the organization.
2. The Cal Poly Corporation obtained board approval for a Bella Montana buy-back program.
3. Facilities Management and Development completed a Request For Proposal and awarded a contract for Integrated Work Management System (IWMS) to Planon Corporation on September 30, 2017 to provide greater functionality through a cloud-based system.
4. Budget and Finance started the implementation of Questica to create more detailed budget entries to improve reporting and transparency.
5. Budget and Finance centralized the benefit pool for Administration and Finance to create a template for campus allowing for the reallocation of budget savings to implement a funding source for strategic goals.
6. The University Controller developed a comprehensive monthly reporting process for Cal Poly's Foundation providing for timely and accurate financial reporting leading to better informed decision making.
7. The Performing Arts Center increased the number of public performances, attendees and ticket revenue and achieved a balanced budget at year-end with significant surplus to contribute to the Major Equipment Maintenance, Repair and Replacement Program (MEMRRP).

Strategic Direction #2

Create a culture of world-class service.

ACCOMPLISHMENTS

1. Transportation and Parking Services (TAPS) implemented an ambassador model for enforcement with a focus on education and positive customer interaction.
2. Public Safety successfully managed several protests, demonstrations and large events with a high potential for campus disruption.
3. Public Safety received approval for officers to carry and administer Narcan for opiate-related medical aids allowing for a quick response which can increase life-saving potential.
4. Public Safety applied for, obtained and implemented the ABC Grant for the third straight year. This grant provided educational opportunities for more than 7,500 students who attended various sessions to learn about responsible drinking and the dangers of consuming alcohol.
5. Facilities Management and Development established customer service as the number one priority of the department.
6. Human Resources leveraged technology to continue process improvements in Educational Fee Waiver, Leave of Absence, and Benefit Enrollment forms using DocuSign and ImageNow templates and email systems where applicable; continued streamlining disability leave processes, working towards Access Database implementation; encouraged employees to create MyCalPERS accounts to have 24/7 access to retirement contribution/service information and the ability to create retirement estimates; continually monitored and updated their website to be informative and user-friendly.
7. Human Resources conducted extensive research on Employee Assistant Program (EAP) service providers in search of the best available services and alternatives to the current EAP provider. They participated on the CO systemwide RFP committee for the EAP contract – with intention of improving services and provider availability for employees. Participation appeared to be instrumental in service improvements of the current EAP provider (a contract was awarded for the next 5 years) which will include better access to providers for Cal Poly employees and a future “virtual therapy” option.
8. Human Resources continued to build trust and transparency across campus through improved customer service and meeting the growing demand for information and services

related to leave programs (disability and parental), health benefits, CalPERS/PST and voluntary retirement plans, educational fee waiver, EAP, voluntary benefit plans, and reasonable accommodations per ADA/FEHA. Customer satisfaction was confirmed through A&F survey results and anecdotally through observation and customer feedback.

9. Human Resources implemented DocuSign for a large number of HR forms resulting in significant process improvements; HR forms accounted for 34 percent of all Cal Poly DocuSign transactions in the last year with roughly 10,000 HR DocuSign envelopes being sent; DocuSign eliminated the need for paper documents and manual routing processes.
10. Human Resources worked in collaboration with the Chancellor's Office to standardize data and processes for systems and policies; examples include CHRS, PageUp, Mandated Reporter and MPP Outside Disclosure.
11. Human Resources led the beginning phase of the implementation of a new technology solution, PageUp.
12. Employee and Organization Development (EOD) focused on inclusivity strategies to improve campus climate. Through a partnership with the Office of Diversity and Inclusion (OUDI), EOD developed a series of workshops and activities to increase awareness of unconscious bias. EOD and OUDI have conducted 15 "Exposing Hidden Bias" workshops involving 350 employees. Workshop participants report an increased ability to recognize and respond to unconscious bias. The "Responding to Hidden Bias" workshop has also been developed and is currently being offered to the campus community.
13. EOD campaigned to highlight the vast array of resources available in Skillsoft. Skillsoft provides employees with over 3,000 courses, 23,000 books, and 36,000 videos focused on business skills, desktop abilities and some specialty skills such as information technology and project management. As a result of the campaign, Cal Poly San Luis Obispo was recognized as the top user of Skillsoft across the California State University system resulting in a \$5,000 savings for our campus.
14. The Business Transformation Office completed 22 A&F business process improvements projects; eight are still in process.
15. The Business Transformation Office presented/facilitated Lean workshops at Fresno State and Chico State, and for Cal Poly Housing Business Services, EHS, FMD, and College of Architecture & Environmental Design.
16. The Business Transformation Office coordinated a 2017 Administration and Finance Customer Satisfaction Survey to allow for continuous improvement.
17. Payroll Services integrated DocuSign into the direct deposit enrollment procedure, which involved getting the SCO on board with accepting electronic information.

18. The University Controller's team revamped the student assistance program and instituted desktop deposit in the University Cashier's Office.
19. The University Controller's team updated the Student Accounts website to be more user friendly.
20. Housing and Public Safety collaborated to improve the customer service experience, allowing for more flexibility.
21. A&F Network and Technology Services (ANTS) developed a strategic plan to achieve focus, efficiency, direction and defined priorities.

Strategic Direction #3

Attract, develop and retain a diverse and talented workforce.

ACCOMPLISHMENTS

1. Facilities Management and Development in collaboration with Strategic Business Services reorganized the Environmental Health and Safety department.
2. Facilities Management and Development supported and completed leadership training for eight custodial leads, four landscape leads, and 21 trades shop supervisors and leads.
3. Human Resources partnered with Cal Poly Corporation's Marketing & Communication to develop an internal marketing campaign to increase employee awareness of benefit programs and educational opportunities related to benefits.
4. Labor Relations coached HR business partners and newly-formed Personnel Analyst Work Group on labor relation issues; presented to key campus constituents newly negotiated contract(s) language; established strong working relationships with union representatives; led Labor Management Committees in facilities and housing to diffuse potential union problems, keeping grievances and complaints to a minimum; participated in monthly HR and Labor Management Committee meetings.
5. Human Resource Information Systems (HRIS) defined and calculated costs and reviewed several proposals with campus stakeholders for the final year of the President's local compensation program. After approval, HRIS processed and provided reports for the updates.
6. Human Resources continued to enhance and improve the talent acquisition process focusing on the rollout of a more streamlined process to include additional client engagement and support, sourcing strategies to increase the diversity and quality of candidate pools and ease of process.
7. Human Resources continued the development of a candidate generation model (research, employer brand strategy, marketing, sourcing and the adoption of a new compensation philosophy.)
8. Human Resources increased the strategic utilization of the executive recruiter for key leadership searches.

9. EOD created and implemented a series of workshops focused on developing supervisory skills. Through learning, discussion, practice and reflection, participants gained a greater awareness of their own supervisory skills and learned strategies for more effectively leading others.
10. EOD leads, coordinates and oversees New Employee Orientation (NEO). The orientation welcomes newly hired employees to campus by connecting them to the campus culture, colleagues, and important information. Employees who have participated in NEO report “feeling more welcomed and valued as a new employee” at a rate of 4.9 on a 5-point scale.

Strategic Direction #4

Engage, partner and collaborate.

ACCOMPLISHMENTS

1. Strategic Business Services (SBS) successfully implemented Procure to Pay resulting in a cost savings of approximately \$8 million.
2. Continued contract repositioning between SBS and Facilities, allowing for more efficient interaction and improved outcomes.
3. Several significant real estate transactions were advanced or completed over the past fiscal year. SBS has worked to expand campus collaboration in order to better leverage all available expertise.
4. New contracts for on-site management of Campus Dining and daily operations for the University Store and Cal Poly Downtown.
5. Improved communications and transparency within Facilities Management and Development.
6. Facilities Management and Development restructured the Facilities Help Center, providing greater efficiency and customer support.
7. HRIS worked with Academic Personnel and the Office of University Diversity and Inclusivity to provide information to a third party vendor for the development of the Affirmative Action Plan.

Strategic Direction #5

Create a safe, vibrant and attractive campus environment.

ACCOMPLISHMENTS

1. Risk Management took on significant additional responsibility in the form of the Clery Act and Public Record Act compliance and continued to make progress on the Enterprise Risk Management initiative and ongoing stewardship of campus policy.
2. The Department of Emergency Management effectively prepared for, mitigated and responded to all threats, events and disasters associated with the campus.
3. The Department of Emergency Management participated in multiple trainings/programs alongside the National Emergency Training Center and FEMA Emergency Management Institute to provide expertise, learn from and engage with current professionals outside our region.
4. Transportation and Parking Services implemented several new campus-wide parking initiatives, including First Time Freshman Parking Restriction, Assigned Parking for Student Commuters, Restructured Short-Term Parking Options, and event parking.
5. Facilities reduced the number of workers' compensation claims by 17 percent from 2016 and by 40 percent since 2015.
6. Exterior painting of buildings 22 and 10 completed earlier than scheduled and under budget.
7. Facilities Management and Development completed repairs and improvements to the campus electrical power system.

Strategic Direction #6

Make sustainability a core part of Cal Poly and A&F culture.

ACCOMPLISHMENTS

1. Formal establishment of the Parking and Transportation Advisory Committee to gather campus-wide input on parking and alternative transportation programs.
2. Cal Poly was awarded Bicycle Friendly University Designation – Bronze Designation; awarded the Parking Matters® Marketing & Communication Award by the International Parking institute for “My Other Car Is” campaign; recognized as “Best Work Places for Commuters”; Officer Herrera received the community award from University Housing; and the Police Department received Advocate of the Year Award from Student Affairs.
3. Completed water and energy conservation projects and made progress on securing a secondary water supply and carbon planning.
4. Completed the Solar Farm and made progress on Solar Lab, YTT Solar and Dairy Digester/Cogen.