Division of Finance and Support Services  
FY 2010 Accomplishments and Disappointments

Accomplishments

FSS Division Goals

Goal I:

*Customer Service*

To enhance customer service and improve the effectiveness and efficiency of University operations.

- University Bookstore installed its new POS system, Ratex, this past fall. Replacing a system that was over 12 years old the new system should give our managers the basic tools to perform their daily functions more efficiently. (University Bookstore)
- University Bookstore provided money to the ASG/Bookstore scholarship once again making it 4 straight years since the scholarship was adopted that a donation has been made. (University Bookstore)
- University Bookstore has assisted putting Texas State logo items once again on the CLC, Collegiate Licensing Corporations, top 75 list for sales of apparel and gifts. University Bookstore is one of the major providers of Bobcat apparel and gifts in the nation. (University Bookstore)
- Dining Services opened Outtake’s at the Den in September 2009. This replaced the Zatarain’s concept that had seen sales decrease. By the end of September sales at Outtake’s had already surpassed Zatarain’s previous entire yearly sales. (Dining Services) In October Dining Services opened our first Panda Express at Jones Diner. Panda has become an instant top seller some days accounting for nearly 2,000 meals. During its first month of operation Panda would routinely see lines 25 – 30 deep. (Dining Services)
- Closed Commons Dining Hall unexpectedly September 18, 2009 due to building deterioration. Quickly moved a full service breakfast concept into Jones Diner to compensate for that service interruption. Adjusted hours and service levels at all other facilities to minimize the services disruption to our customers. (Dining Services)
- Worked with the ASG to eliminate some inefficient bus routes and enhanced services where more service was needed. Have begun the process to purchase 4 new buses for fall 2010 to add more service to our system. (Auxiliary Services)
- Working with the City to review the possibility of a coordinated transit system that would service both Texas State students and San Marcos residents. Final report due August/September 2010. (Auxiliary Services)
- Consolidated operations in Print Shop and Copy Cats to run a more efficient operation that services the campus while not wasting resources. Continue to shift our focus from offset to digital technology where the future of printing is going. (Print and Mail Services)
- Printed short run orders of Business Cards, Letterhead and Envelops on our existing Digital Presses in the Print Shop. We were able to closely replicate the University Colors to the point where we have 100% customer satisfaction. We are in the process of reducing our pricing based on the cost savings we will pass on to university departments. Digital printing is also a much greener way to print as it uses fewer chemicals and solvents than traditional offset presses. (Print and Mail Services)
- Drafted UPPS revisions and policies for Guest Housing, Lease Acquisition, and Public Art (specifically addressing mosaics). (Planning, Space Management and Real Estate - Real Estate Specialist and AVP)
Provided numerous updates to the FSS Division website in a timely manner, including the division’s CEU program. (Planning, Space Management and Real Estate - Coordinator Facilities Inventory)

Migrated six different websites to the university’s new web template. (Planning, Space Management and Real Estate - Coordinator Facilities Inventory)

Made significant progress developing SAP Flexible Real Estate Management to manage the Building and Room Inventory (while maintaining the existing system). (Planning, Space Management and Real Estate - Coordinator Facilities Inventory)

Provided GIS data to faculty and students in the Department of Geography for various class and research projects. (Planning, Space Management and Real Estate - Coordinator Facilities Inventory)

Updated the Campus Master Plan presentations and walking/driving tours as needed. (Planning, Space Management and Real Estate - AVP)

Distributed in March 2010, with the assistance of Institutional Research, the Facilities and Environment Survey to students, faculty and staff. (Planning, Space Management and Real Estate - AVP)

Developed and pushed out training on:
  - BEx Analyzer software, used to develop and monitor budgets.
  - Salary Related Reports
  - Budgeting orientation for VP’s, AVP’s, deans, directors and chairs, in response to our focus group with academic chairs (Budget)

Made the following improvements to the SAP environment:
  - Added a new Budget Balance Report, a high-level report in SAP designed specifically with managers in mind. It shows the current budget, actual expenditures and encumbrances, and available budget for each commitment item group. This was done in response to a focus group session and survey of academic chairs.
  - Improved the email notifications regarding budget changes sent to account managers. This was done in response to a focus group session and survey of academic chairs.
  - Added new reports for projecting the cost of State longevity and University Longevity on both a permanent and fiscal year basis. (Budget)

Revised our methodology for estimating the income for certain registration fees and shared both the methodology and data with managers, as a result of our focus group with Student Affairs. (Budget)

The core fabric of Environmental Health, Safety and Risk Management is centered on customer service with the highest level of efficiency. We do this with quick response time and courteous and decisive actions when we are called for service.

AVP Facilities implemented a communications strategy w/ the goal of ensuring information is conveyed to and understood by the target audience and to expand the dissemination of information through various means (e.g., weekly staff meetings w/ each of my direct reports, monthly meetings w/ the entire leadership team, quarterly meetings w/ all the staff in small shop meetings, monthly coordination meetings between PDC staff and all shop supervisors, scheduled meetings w/ key customers, etc). The quarterly meetings with all the shops have helped improve communications and facilitate the sharing of information in open forum discussions resulting in greater understanding of initiatives and enhanced trust between management and line staff. Implemented the use of summary reports and monthly meetings to improve communications and coordination between PDC, shops and external customers. (Facilities)

OFPDC continued to utilize its IDIQ (Indefinite Delivery Indefinite Quantity) contracts (primarily for Interior Design services, Environmental services, and Mechanical Electrical Plumbing Engineering services) to better serve the University Customer. This gives us greater flexibility to
reduce the length of time required in soliciting Professional Services, thereby, delivering projects in a timely manner. (Facilities)

- OFPDC continuously updates the Office website with current Construction Status Updates, Design Guidelines, Campus Standards, documents / forms, and Staff contacts to better inform the campus community, bidding community, etc. (Facilities)
- Facilities Operations/Utilities successfully conducted campus wide coordination meetings w/ stakeholders to receive and address their concerns in order to mitigate the impact of a campus wide steam system and building heating outage scheduled for May 14-16, 2010. (Facilities)
- Utilities implemented a water treatment quality assurance program that has already yielded a 30% reduction in annual costs of chemicals (~$200K) while improving the overall quality of the thermal water. (Facilities)
- Utilities also changed boiler water treatment processes and operational protocols enabling recovery of about 20% (up from 0%) of boiler condensate water and a commensurate reduction in makeup water requirements at the Cogeneration Plant. (Facilities)
- Custodial developed a new approach for cleaning carpeted areas at ALKEK that engaged the library staff in the planning and scheduling of the work resulting in better, more economical delivery of carpet cleaning services and fostering a tighter cooperative bond between ALKEK staff and Custodial Operations. (Custodial Operations)
- Custodial continued its outreach efforts providing a presentation to the Associated Student Government regarding increased utilization of green products, equipment and techniques thereby raising students’ awareness of the complexity of providing custodial services to the University and custodians’ commitment to better serving their needs as our most important customers. (Custodial Operations)
- Grounds completed various landscape enhancement projects including an extensive effort to clear brush and overgrown areas along Sessom creek near the Freeman Aquatic Biology building garnering accolades from the faculty and staff there for the beautiful outcome. The grounds crew kept the staff at Freeman Aquatic informed as the project progressed and received praise for their efforts that greatly improved the look of the building and provided a “nice area for a picnic.” They also completed the Ivey-Moore House re-landscaping project, including installation of a new irrigation system, providing a high traffic area of San Marcos an entry into campus that is very attractive for community members as well as students and employees. (Grounds Operations)
- The Grounds Irrigation Staff initiated a program to identify all serial numbers, sizes and locations of backflow preventers and master valves on the grounds net for the irrigation systems, their raising students’ awareness of the complexity of providing custodial services to the University and custodians’ commitment to better serving their needs as our most important customers. (Grounds Operations)
- Custodial created a “service call” database. All customer service calls are logged and monitored to ensure services are provided as requested and customers are contacted afterwards to ensure their request was taken care of to their satisfaction, as well as, in a timely manner. (Custodial Operations)
- Grounds efforts have improved the efficiency and operability of the system. (Grounds Operations)
- Facilities Management implemented an e-mail notification system to notify customers of receipt of their work requests and to provide status updates as their request is assigned to a shop for execution. (Facilities)
- Facilities Management redesigned the billing process to allow for continual monitoring of billable transactions by Facilities staff to ensure proper and timely. (Facilities)
- Created an Internal Management Reporting website to allow management access to Monthly Operating Reports, the enhanced monthly bond proceeds report, and the dashboard of key financial indicators (Financial Services-Accounting)
• Developed and implemented new travel policies related to lodging and meals and incidental expenses per diems in accordance with the U.S. Government Services Administration guidelines (Financial Services-Accounting)
• Developed and implemented travel policy enhancements for non-overnight meal allowances and business meal reimbursements (Financial Services-Accounting)
• Developed and implemented the first phase of student organization accounting integration into SAP (Financial Services-Accounting)
• Drafted RFP and IFB solicitation templates which were posted to the Contract Compliance website. (Financial Services-Contract Compliance)
• Held quarterly HUB Coordinators meeting in the Fall of 2009 and Spring of 2010 to brief divisional and area HUB’s on topical HUB issues. (Financial Services-Contract Compliance)
• SAP account request forms redesigned (Financial Services-FI Master Data Center)
• Instituted annual check for vendor data inconsistency and inactivity (Financial Services-FI Master Data Center)
• Imaging backup documentation of SAP account setups and attaching them to the system (Financial Services-FI Master Data Center)
• Completed Vendor Data Management and Archiving project, archiving over 10000 inactive vendors (Financial Services-FI Master Data Center)
• Completed Identity Theft Red Flags project (Financial Services-FI Master Data Center)
• Participated in the successful implementation of the E-procurement system (BOBCatalog) (Financial Services-FI Master Data Center)
• Active participation on the SAP Travel and Expense Module implementation and Advisory Board Spend Management project (Financial Services-FI Master Data Center)
• Migratedchartered student organization accounts to SAP in order to comply with IRS regulations (Financial Services-FI Master Data Center)
• Active participation on the SAP Travel and Expense Module implementation and Advisory Board Spend Management project (Financial Services-FI Master Data Center)
• Direct deposit information is no longer being required at the time that the vendor is setup speeding up the procurement process. Direct deposit information will be requested while processing the payment to the vendor (Financial Services-FI Master Data Center)
• Administrative outcomes and assessment reviewed, results will be reported in June 2010 (Financial Services-FI Master Data Center)
• Added customer service survey to the FI Master Data Center web site (Financial Services-FI Master Data Center)
• Provided data to the Texas Procurement and Support Services (TPASS) regarding the HUB Disparity Study (Financial Services-FI Master Data Center)
• Participated in the creation of the SAP resources web site (Financial Services-FI Master Data Center)
• Worked with Materials Science and Engineering (MSE) Academic department to create a Memorandum of Understanding (MOU) relating to receiving freight directly at the Mitte building. The MOU addressed the processes to be followed by the Materials Science and Engineering and the Materials Management department in order to be in compliance with this MOU. This MOU outlined how they should have separation of duties, how they should receive freight and what time frame the documentation needed to be submitted to the Materials Management Department in order to pay invoices in a timely manner as not to incur late charges and meet the Texas prompt payment act. This process and MOU will be evaluated and fine tuned in the March of 2010. (Financial Services-Materials Management)
• To be more supportive of University Faculty and staff and in particular the offices supporting Research, the Materials Management department was self identified as an Essential university department. This change required coordination of employees work schedules and job
responsibilities in order to provide our services and remain open during energy conservation days when most of the University Campus is closed. (Financial Services-Materials Management)

- Was a member of the SciQuest implementation Team to create an e-procurement catalog ordering system called BobCatalogs that went live with phase I on October 1, 2009, phase II Jan. 1, 2010 and phase III on March 1, 2010. Worked for six months with Sciquest employees to identify purchasing, receiving and accounts payable information that needed to be captured in SciQuest requisitions and purchase orders that could be transported into SAP purchase orders. I was a member of the BobCatalogs training team that developed training materials and taught back office and university department personnel how to use BobCatalogs. (Financial Services-Materials Management)

- Materials Management had another successful Annual Surplus Property Auction in November 2009 which grossed sales of $47,468.50 that was deposited into the University general revenue fund. We also had several pieces of surplus property that we sold by on-line auctions in 2009 with the sales totaling $10,698.92. (Financial Services-Materials Management)

- Worked with the members of the IT Security office and ITAC to develop new business rules, create policies and procedures that define the new workflow to remove and destroy hard drives from surplus computers and other IT equipment before they are picked up by Materials Management personnel for transfer to the University Distribution Center. This notification process is done through our Materials Management website using the “pick up of surplus property” form which is routed to ITAC personnel for them to remove hard drives and then to Materials Management personnel to pick up the surplus computers and other property. (Financial Services-Materials Management)

- Submitted the Annual Inventory documentation to State Comptroller by required due date of Sept. 20, 2009. This Inventory consisted of 360 inventory account reports totaling 17,555 assets with a total net book value of $160,045,452.65 which was verified and updated by the Property Management Office. Completed Asset Note 2 for the Annual Financial Report required to be submitted to the State Comptroller by Nov. 20, 2009. The Asset Note 2 was part of the Annual Financial report which was prepared and verified by the Director of Accounting. The required Annual Reconciliation documentation of SAP and SPA was submitted to the State Comptroller by Oct. 19, 2009 and this documentation was signed and verified by the Vice-President for Finance and Support Services and the Director of Materials Management. (Financial Services-Materials Management)

- All monthly, supplemental and semi-monthly payrolls were produced on-time with applicable deductions submitted to the proper authorities. (Financial Services-Payroll)

- Net Payroll processed through April 15 in FY10 was in excess of $86,120,696 paid to some 9, 400+ faculty, staff, hourly and student employees via 58,337 Direct Deposits and 5,594 Checks. These employees were paid according to the published pay dates based on the current assignments entered in SAP at the time of processing. For those employees whose paperwork was delayed or approval of time occurred past deadlines, staff assisted them in receiving payment for services rendered. (Financial Services-Payroll)

- Electronic W-2’s were first introduced to the campus during the fall of 2008 for use during the 2008 tax season. This new electronic functionality strengthened security of confidential employee information and improved the timeliness of employee W-2 distributions. For the 2009 tax season, enrollment in this new functionality by current faculty, staff, hourly and student employees reached 25.770% and is anticipated to grow each year as user acceptance increases. (Financial Services-Payroll)

- Maintained an online survey on departmental home page and a paper form version is available in our JCK Office – Continued to have 100% favorable responses. (Financial Services-Payroll)
• Reviewed our presenter’s Professional Development Participant Evaluations of workshops for future improvements. (Financial Services-Payroll)
• Key presenter in the September 2009 Contracted Services and Nonresident Alien Workshop sponsored by Professional Development. (Financial Services-Payroll)
• Key presenters in the February and March 2010 International Student and Scholar Tax Workshops using the CINTAX software. (Financial Services-Payroll)
• Participated in the fall 2009 NRA Faculty Orientation sponsored by the International Office. (Financial Services-Payroll)
• Participated in the NRA Student Orientation held before the fall 2009 and spring 2010 Semesters which are sponsored by the International Office. (Financial Services-Payroll)
• Individualized training was offered to time administrators, supervisors and administrative assistants responsible for the auditing and approval of hours worked and entered for student and hourly employees. Time entry training was also available for those student and hourly employees needing assistance. (Financial Services-Payroll)
• Worked with MSE and Tom Myers to develop a pilot program which would allow desktop deliveries and single P-Card purchases. (Financial Services-Purchasing)
• Received a Staff appreciation award from Campus Recreation (Financial Services-Purchasing)
• Co-sponsored the Vendor/Travel Show. The turnout for both vendors and participants was the largest to date. (Financial Services-Purchasing)
• Conducted twelve P-card trainings for the campus. (Financial Services-Purchasing)
• Hosted focus groups on campus community to learn the e-procurement system. (Financial Services-Purchasing)
• Reviewed/revised 13 UPPS’s for which HR is the senior reviewer including:
  o 04.04.01 – Miscellaneous Human Resources Policies and Procedures
  o 04.04.03 – Staff Employment
  o 04.04.06 – Employment and Participation in Activities Outside the University
  o 04.04.07 – Nepotism and Related Employment
  o 04.04.11 – University Compensation and Classification Policy
  o 04.04.12 – Compensation in Excess of Base Salary
  o 04.04.16 – Staff overtime and Compensation Time Policy
  o 04.04.17 – Background Checks
  o 04.04.20 – Staff Performance Appraisal Policy
  o 04.04.30 – University Leave Policy
  o 04.04.41 – Staff Employee Mediation, Grievance, and Complaint Policy
  o 04.04.48 – Drug Free Schools and Communities Act
  o 04.04.50 – Checkout Procedures – Separation of Employment (Human Resources)
  o Processed/managed 5 grievances and 6 complaints, researched and participated in two EEOC mediations, and had 75 employee relations meetings initiated by management or an employee. (Human Resources)
• Continued to expand/improve metric, analytic, and ad hoc reporting for federal/state agencies, TSUS Board of Regents, Texas State Senior Management, and Texas State Departments. Prepared 42 reports:

(New – Variable Compensation Report, Salary Survey Metrics)


(New – Termination Dates for Student Employees and Tracking NSNR Hours Worked, Student Time Entry)

c. Ad Hoc Reports (For Texas State Departments – 8) – University Service Awards, University Directory, Parking Permit Eligibility, Parking Permit – Retirees, FY Retirees, Admin Staff Appreciation, LBJ Picnic Employee List, President’s Mentoring Coffee. (Human Resources)

Continued to update HR website and Staff Handbook. Implemented new procedure requiring a mandatory review of all website and Staff Handbook material on a quarterly basis to ensure currency/accuracy of information. (Human Resources)

o Implemented new spreadsheet process to track UPPS status to ensure HR UPPS’s are reviewed in a timely manner. (Human Resources)

o Implemented new spreadsheet process to track status of metric, analytic, and ad hoc reports to ensure reports are produced by the required due date. (Human Resources)

Secured through the new Bobcat Balance program the supervisory training necessary to implement the provisions of UPPS 04.04.18 Drug Testing for Non-Faculty Employees

o (target date is June 1, 2010). (Human Resources)

Documented field level use of legacy programs for IT transition plan to discontinue use of legacy system data (12/09). (Human Resources)

Began study and evaluation of Employee Self Service (ESS) and Manager Self Service (MSS) SAP functionality enhancements (Fall 2009). MSS functionality completion is a prerequisite for implementing an electronic PCR process. (Human Resources)

Continued work with IT to expand functionality of the Business Warehouse to enhance HR metric reporting. (Human Resources)

Developed Retirement Eligibility Report to help supervisors assess their workforce (03/10). (Human Resources)

Continued work to develop and implement an electronic PCR process. Over 7,440 PCRs + 320 spreadsheet action entries processed by 3/31. About 18-20,000 PCR’s are processed annually. (Human Resources)

Completed 77 new position and reclassification audits with an average turnaround time of 4 days. (Human Resources)

HR continued the departmental strategy of making at least one outreach visit each FY to each college and divisional council each academic year. (Human Resources)

Creation of New Change in Pay PCR Action on IT 000 – ACTIONS - ability for campus departments to view their employee’s change in pay actions due to ULP, Hazardous Duty or State Longevity increases- 02/10. (Human Resources)

Continued work on identifying and negotiating temporary contracts with 3rd party vendors for temporary employees to save each department in the university from large bill rates. (Human Resources)

Completed New EASY step-by-step PowerPoint presentation for hiring manager’s site 03/2010. (Human Resources)
- Updated new interview questions on Hiring manager webpage 02/2010. (Human Resources)
- Implemented E-Verify process 10/09. (Human Resources)
- Introduced new customer satisfaction survey to gauge satisfaction with the job audit process and timeliness. 10/09. (Human Resources)
- Completed the vendor selection process for the Third Party Cashiering solution. TouchNet was chosen for the new system. (Treasurer)
- Began the SIS Implementation Phase which included Base Camp, Business Process Modeling, and Accounts Receivable configuration. Several key staff members were involved in the various processes. (Treasurer)
- Implemented several new E-Commerce applications across campus to assist departments with providing better service to their customers. New applications include Student Health Center, University Star, Testing Center, and EARDC as well as several applications for various conferences and camps. Also expanded applications for Fine Arts, Continuing Education, and College of Education. (Treasurer)
- The authorization for EFT sign up for Financial Aid disbursements was implemented into the on-line FA award acceptance process. We expect to see significant results from this modification over the next six months. (Treasurer)
- Implemented an automated process to upload mass charges to student accounts in the SARS system via a flat file. These charges originate from a variety of sources i.e. Residence Life, Student Health Center, and Financial Aid. This new process has saved numerous hours of manual data entry work as uploads can include 200-300 students. (Treasurer)
- Implemented a paper survey to be distributed at our cashier windows and reception desk areas to determine the type of service customers were using as well as their satisfaction with this service to help us improve customer service. (Treasurer)
- Incorporated the main phone line for the Collections office into the automated phone tree for SBS to assure students calls were being answered promptly and efficiently. (Treasurer)
- Served on Wells Fargo Advisory Board. (Treasurer)

**Goal II:**

*Physical Facilities, Grounds and Infrastructure*

To ensure the physical facilities, grounds, and infrastructure enhance the experiences of learning, living, working and visiting Texas State.

- Developed Scope of Work for the Campus Master Plan Revision. (Planning, Space Management and Real Estate - AVP)
- Finalized site location off campus for a new Center for Research Commercialization facility. Initiated facility programming and land/master planning. (Planning, Space Management and Real Estate - Real Estate Specialist)
- Participated in negotiations to establish partnership with City of San Marcos regarding the Research and Commercialization Park. Assisted with the preparation of an EDA grant application. (Planning, Space Management and Real Estate - Real Estate Specialist)
- Coordinated relocation of all staff departments to alternate locations on and off campus in order to vacate Commons Hall for rodent removal. (Planning, Space Management and Real Estate - Real Estate Specialist)
- Negotiated purchase of land parcel from San Marcos Public Housing Authority for the track relocation. (Planning, Space Management and Real Estate - Real Estate Specialist)
- Acquired new lease agreements for: Housing and Residence Life, CRC, ALERRT, Katherine Ann Porter Home/Museum. (Planning, Space Management and Real Estate - Real Estate Specialist)
• Handled assignment of the Capital Area Health Education Center lease, extended Hunting and Grazing lease with Frost National Bank, Trustee, and researched religious organization use of campus facilities. (Planning, Space Management and Real Estate - Real Estate Specialist)

• Handled negotiations related to sale of “Hunt” home in Houston donated to the Texas State Support Foundation. (Planning, Space Management and Real Estate - Real Estate Specialist)

• Negotiated easement with City of San Marcos related to drainage improvements at Bobcat Stadium and Baseball Complex. (Planning, Space Management and Real Estate - Real Estate Specialist)

• Participated in oversight of planning and execution of road repairs of University Road in Wimberley and landowner access notifications. (Planning, Space Management and Real Estate - Real Estate Specialist)

• Worked with Research Department and Office of Sponsored Programs to identify space needs and finances to support rent/operations with goal to secure off campus space: Texas Child Safety Center, Center for Children and Families, The Education Institute, and Family and Consumer Sciences (Baby Café). (Planning, Space Management and Real Estate - Real Estate Specialist)

• Managed space assignments at West Warehouse related to department and program storage needs and worked with Facilities and all space users to initiate use of controlled gate security entry. (Planning, Space Management and Real Estate - Real Estate Specialist)

• Managed university guest housing for visiting scholars, invited guests and incoming staff. (Planning, Space Management and Real Estate - Real Estate Specialist and Senior Administrative Assistant)

• Participated in structuring agreements related to Sessoms Hike & Bike Project (pending), Peques Street Intersection (pending), and Science Park Interlocal (pending). (Planning, Space Management and Real Estate - Real Estate Specialist)

• Reviewed prospective property proposals as initiated by private owners and agents. (Planning, Space Management and Real Estate - Real Estate Specialist)

• Collaborated on $30 million capital plan to address needed repairs and improvements to utilities infrastructure. (Budget)

• Enhanced the Occupational Health and OSHA compliance programs by conducting daily visits to those areas where the highest number of personal injuries have occurred and providing consultations and training as needed to supervisors and the injured employees. (EHSRM)

• Continued the partnership with the San Marcos Fire Department to provide the following services to the University community:
  o Conduct fire safety training for staff and students (RA’s) of Residence Life at the beginning of each semester with the primary focus of providing instruction about emergency evacuation, emergency response and fire fighting procedures.
  o Monthly visits to the campus for building familiarization to enhance the emergency response process. (EHSRM)

• Guidelines and Standards of Construction. The Standards are reviewed continuously. They are revised and updated as necessary every two years and distributed to Facilities Shops. These Guidelines standardize the specific materials, products and designs to be used in all University facilities. (Facilities)

• Facilities Operations / Utilities staff is in the process of developing a Utility Infrastructure Master Plan. They are also preparing to conduct a comprehensive audit of the utilities operations department as well as undertake several other initiatives such as assessing the adequacy of the chemical treatment program, conducting a comprehensive hydraulic study of the thermal systems,
performing a complete coordination study of the electric grid, and implementing the phased replacement of obsolete controls and monitoring equipment. (Facilities)

- Custodial is replacing entry mats with floor mats made of 100% recycled materials. These replacement mats carry a lifetime guarantee, work much better and are significantly more aesthetically pleasing. (Custodial Operations)
- Grounds designed and installed a new irrigation system Cogen/Tomas Rivera and planted a 700 square foot bed with Asian Jasmine between LBJ and Alkek thereby saving the cost to outsource these efforts. Grounds also resumed mowing with in-house resources saving about $20,000 annually in contract support costs. (Grounds Operations)
- Facilities Management successfully replaced the hot water boiler system supplying the Strahan/Jowers complex with building heat and domestic hot water utilizing a boiler recovered from the RRHEC. This long needed project eliminated the need to pump hot water through 2300 feet of aging underground piping that was in constant need of repair. (Facilities)

Goal III:

Diverse and Engaged Workforce

To recruit, develop, and retain an outstanding, diverse, and engaged workforce that are skilled, student oriented, innovative, and recognized for their commitment to excellence.

- Dining Services continues to hire recent graduates or soon to be graduates for management associate positions. This has included African American Males, Hispanic Females and Hispanic Males. (Dining Services)
- Overall all the Departments in Auxiliary Services employ 47 fulltime employees of those 38 or 80.9% are minority. (Auxiliary Services)
- Employed a female student worker to assist the Facilities Inventory Coordinator with campus web mapping and inventory data base entry. (Planning, Space Management and Real Estate - AVP)
- During the designated time period we did not hire any additional staff. The existing staff is afforded opportunities to attend professional training to enhance their skill levels. (EHSRM)
- OFPDC recruits widely and retains an outstanding and diverse workforce of 23 professionals. This Staff includes: 4 Registered Architects, 2 Professional Engineers, 1 GIS Technician, 1 CADD Drafter, 5 Construction Contract Administrators, 4 Construction Managers, 1 Construction Program Analyst, 1 Purchasing Specialist, 1 Accountant, 2 Construction Inspectors, and 2 Administrative Assistants. The Staff has logged over 800 hours of Professional Development seminars and Continuing Education. OFPDC has two LEED Accredited Professionals on Staff. (Facilities)
- OFPDC is responsive to the educational well-being of Students. The Office coordinates with Faculty to promote and maintain Student Internships, i.e. the Shadowing Intern Program. Student Interns are assigned to an OFPDC Staff member to “shadow” in all aspects of the member’s performance of duties. Student Workers are hired from the Department of Construction Science and are mentored by Staff Project Managers and Construction Managers. (Facilities)
- Facilities Operations / Utilities continues to recruit and hire from a diverse pool of applicants: a Hispanic female was hired to fill a vacant Technician of Water Quality position and three Hispanic males were hired to fill a Technician of Water Quality, a Power Plant Operator and a Control Room Operator positions. A Power Plant Mechanic (Hispanic male) was selected to participate in the Staff Educational Development leave program for Fall 2009 and Spring 2010. (Facilities)
- Facilities Operations / Utilities completed a comprehensive program to offer power plant training for mechanics, operators and technicians during Fall 2010. Also completed comprehensive training for water well operators on the new Jackson Well Disinfection system. (Facilities)
• Custodial: One Administrative Assistant has become certified through TESSA and a second has completed Projects & Manual to become a “Competent Communicator” as well as taken first place in both the club and area level competitions of the Toastmaster organization. (Custodial Operations)
• Restructured the Custodial Teams to better serve all areas and all shifts but most importantly, to utilize the strengths of each Crew Supervisor and Head Custodian by allowing them more autonomy, responsibility and manageable workgroups. (Custodial Operations)
• Continued efforts to recycle paper products within each area of General Accounting (Financial Services-Accounting)
• Conducted twelve P-card training for the campus. (Financial Services-Purchasing)
• Planned, Publicized and Held a Historically Underutilized Business (HUB) Economic Opportunity Forum (EOF) in mid-September, 2009 in San Marcos. Recruited the San Marcos Hispanic Chamber of Commerce and the Texas State Small Business Development Centers as co-sponsors for the HUB EOF. (Financial Services-Contract Compliance)
• Participated in, purchased, and began work with 3 CUPA-HR and two local salary surveys to prepare the annual market position review for President’s Cabinet. (Human Resources)
• HR secured an Equity and Access one-time $5,000 grant for a study through Hot Jobs to determine the best recruiting sources for diversity job applicants (10/09). (Human Resources)
• Conducted 82 group and one on one training/development sessions for faculty and staff that included: Managing Positions and PCR’s in SAP, Performance Appraisal Training for Staff, Compensation/Classification Training, HR Training for Grants, Understanding Organizational Management in SAP, Understanding Student Employment and Creating Student PCR’s, I-9’s for International Employees, Managing@Texas State, EASY Employment Training, Leave Management Training, New Employee Orientation I and II, Bobcat Balance. (Human Resources)
• Secured approval and hired Suzanne White to develop and produce an administrative support staff training course (2/10). (Human Resources)
• Filled Administrative Assistant III and Sr. Human Resources Assistant position vacancies with one Hispanic and one white female respectively which produces a diversity profile for HR of 12 White (4 males/8 females), 6 Hispanic (6 females), and 1 African American (1 female). HR has had 2 White (2 females), 3 Hispanic (1 female/2 males), 2 Black (2 females), 1 Asian/Pacific Islander (1 female) Work Study students, 1 Hispanic (1 female) regular wage student, and 4 White (3 female/1 male), 1 Black (1 Female), 1 Hispanic (1 male) Student Interns. (Human Resources)
• HR Staff attended 133 Professional Development Activities. Each HR staff member attended at least 2 professional development activities. Director, Associate Directors, and each HR Manager attend at least one national level professional development activity each year. (Human Resources)
• Used temporary salary savings, M&O funding, and VPFSS annual performance award funding to award all 18 HR employees (excluding the Director) a performance award for FY 09 (10/09). (Human Resources)
• Each eligible HR staff member received a merit award for FY 09 (9/09). (Human Resources)
• As per HR Office policy, each HR staff member received a length of service certificate on their HR Office employment anniversary date. (Human Resources)
• HR staff hired 8 Work Study students, 1 regular wage students, and 6 student interns. HR staff also gave 9 Student interviews for course credit and approved two student projects to study HR operations for course credit. (Human Resources)
• 68% of HR employees contributed $207 to the Reach For The Stars Campaign (Overall 38% of Texas State employees contributed to the campaign)(11/09). (Human Resources)
• Implemented new internal system to track employee development activities noted as needed/wanted on annual performance appraisal form to ensure that HR employees obtains development activities noted on the appraisal (2/10). (Human Resources)
Serve as Historian for Texas Higher Education Human Resources Association (THEHRA) and currently working on the thirty-five year history of the organization to be distributed at the June 2010 meeting. (Human Resources)

Implemented Bobcat Balance -- EAP/Work Life resources program with third party vendor (3/10). (Human Resources)

Coordinated events for National Work & Family month and co-hosted the Employee Wellness Fair (10/09). (Human Resources)

Coordinated annual Financial Planning & Retirement Fair (03/10). (Human Resources)

Took over central administration of the Employee Perks program from Staff Council (2/10). (Human Resources)

All HR Office employees received a rating of 300 or above on their CY09 annual performance evaluation appraisals. (Human Resources)

All HR Office GOJA’s and Performance Plans were reviewed and updated as necessary. (Human Resources)

The HR Office continued using the HR Template for each employee that ties each employee’s individual duties to the appropriate HR, FSS, and University Goal. (Human Resources)

Weaver-FSS Team Award Fall 2009; Brandenburg-Tina G. Schultz Staff Excellence award 9/09. (Human Resources)

Continued monthly publication of the Human Resources Bulletin to all regular faculty, staff, and certain benefits eligible graduate student employees. (Human Resources)

Continued monthly HR Forum meetings with selected representatives from all divisions. (Human Resources)

Accepted request from the President of the University of Texas-Pan American through the Vice President for Business Affairs to conduct a peer review with the University of Texas-El Paso of the UT-Pan Am Human Resources operation. (3/10) (Human Resources)

Accepted request from the Vice President for Finance and Operations at Sam Houston State University to investigate and evaluate a grievance filed by an HR employee against the Director of Human Resources at SHSU. (4/10) (Human Resources)

Goal IV:
Environmental, Social and Economic Sustainability
To demonstrate a commitment to environmental, social and economic sustainability in the areas of energy and resource management, purchasing, waste reduction and recycling, health and safety, and buildings and grounds.

- Dining Services continues to be one of the campuses major contributors to sustainability issues which are highlighted on our web page http://www.dineoncampus.com/txstate/show.cfm?cmd=sustainability Programs included Going Trayless, Dine in the Dark, Project Greenplate, and our ongoing support for the university composting program, Bobcat Blend. (Dining Services)

- Continued expansion of the Texas State Tram service that will encourage more students to leave their vehicles at home and reduce emissions and road congestion in San Marcos. (Auxiliary Services)

- Continue to operate the Student run Bike Coop even though our location was taken from us this past November. The Bike Coop still maintains a small presence looking for better and more robust space to come available in the future. (Auxiliary Services)

- University Bookstore sponsored the e-waste initiative for the second year providing shirts to volunteers. The Bike Cave was the recipient of the $7,500 donation that was raised as a result of the program. (University Bookstore)
Continue to work with our Dining Hall staff to help reduce the amount of waste entering our waste water system in order to keep the universities COD levels in compliance with City of San Marcos requirements. (Dining Services)

University Bookstore sold Graduation Gowns made of 100% Recyclable material exclusively. Our Competition across the street continued to sell the traditional material and charged $1.00 more than the bookstore. Once again University Bookstore saved students money while being good stewards of the environment. (University Bookstore)

Service as Co-Chair of the Planning Committee for the Common Experience Sustainability project for the 2010-2011 academic year. (Planning, Space Management and Real Estate - AVP)

Assisting students in developing the first Sustainability Field Camp to be offered September 2010. (Planning, Space Management and Real Estate - AVP and Senior Administrative Assistant)

Assisted faculty in developing the first “Infusing Sustainability into the Curriculum” workshop to be held in May 2010. (Planning, Space Management and Real Estate - AVP)

Continue to serve on the Environmental Services Committee (ESC). Assist with ESC budget and with purchasing needs for various ESC projects, (e.g. Earth Day, Bike to School Day, E-waste Recycling, etc.). (Planning, Space Management and Real Estate - AVP and Senior Administrative Assistant)

Coordinated development of utility service to Centerpoint Farm to support ongoing projects including composting project. (Planning, Space Management and Real Estate - Real Estate Specialist)

Serve as webmaster for the Texas State Environmental Services Committee. (Planning, Space Management and Real Estate - Coordinator Facilities Inventory)

Continued the implementation of the Hazardous waste management and chemical handling training program for faculty, staff and students who work with and handle chemicals in a laboratory and industrial environment. Included in this program was Hazardous Communication (HAZCOM) training which was identified as a deficiency by the Audit and Compliance group. The training will be ongoing as new employees are hired. (EHSRM)

OFPDC demonstrates a commitment to environmental and economic sustainability in the areas of energy and sustainability in the planning, design and construction of University facilities. Currently, the RRHEC Nursing Building, the Undergraduate Academic Center and the Performing Arts Center Complex have all been planned and designed with LEED Credits as a priority. (Facilities)

Facilities Operations / Utilities negotiated an electrical energy contract for the Round Rock Campus that saves 1.5% on the cost of electricity and uses 15% Green Power. Also obtained a reimbursement grant from Edwards Aquifer Authority to replace 66 water closet fixtures at the JCK building for a cost of $30K. Project upon completion (2nd Qtr 2010) is projected to save $1.4 million gallons of water per year. Also, assisted System Office in negotiating a Natural Gas contract that resulted in a 19% decrease over the previous contract rate. (Facilities)

Custodial polished concrete floor in archives area of ALKEK library to eliminate need for chemical use as well as greatly reduce dust generation. Also conducted successful pilot with foam soap in ALKEK resulting in financial savings, time and labor savings and increased customer satisfaction. Plan is to convert building by building across campus. (Custodial Operations)

Custodial is using an electric cart to remove trash from the quad to enhance aesthetics of the area by enabling the removal of large trash dumpsters. (Custodial Operations)

Irrigation-- redesigned existing irrigation system at Alkek and installed MP Rotators to improve efficiency on valves 2 and 3 for outcomes. Installed MP rotators to improve efficiency and conserve water at Evans Liberal Arts and Music. Removed damaged Pepco irrigation drip at JCK
and designed and installed a more efficient irrigation system using MP rotators. (Grounds Operations)

- Recycling: Texas State once again participated in RecycleMania for 2010. The following are amounts captured during this event: Cardboard (OCC) = 32.7 tons, Mixed paper = 58 tons, Aluminum = 0.62 tons, Plastics = 2.27 tons. Total FY 2010 (as of 4/20/2010) capture of recyclables including RecycleMania: Cardboard (OCC) = 57.42 tons, Mixed paper = 133.99 tons, Aluminum = 1.62 tons, Plastics = 7.32 tons.

This is how Texas State fared in each of the RecycleMania 2010 competition categories:

- **Per Capita Classic** – 5.48 cumulative lbs of recyclables per person.
- **Gorilla Prize** – 151,872 cumulative lbs of recyclables (everything collected)
  - Nation Rank 117 of 346, Texas Rank 10 of 21
- **Targeted Material – Paper**, 3.35 lbs per person
  - Nation Rank 133 of 223, Texas Rank 10 of 13
- **Targeted Material – Corrugated Cardboard**, 1.89 lbs per person
  - Nation Rank 169 of 231, Texas Rank 8 of 14
- **Targeted Material – Bottles & Cans**, 0.24 lbs per person
  - Nation Rank 196 of 223, Texas Rank 10 of 15
- **Targeted Material – Food Service Organics**, 0.20 lbs per person
  - Nation Rank 108 of 127, Texas Rank 2 of 4 (Facilities)

- Recycling efforts also included acquiring a new and more accurate digital scale for weighing recyclable material, incorporating the collection of toner cartridges into our recycling program, and targeting a 2% waste reduction for FY 2010 at two dining halls. (Facilities)
- Facilities Management successfully implemented the Miox system to disinfect fresh water in lieu of liquid chlorine injection. This project successfully eliminated the dangers associated with liquid chlorine, while providing a more cost effective means of domestic water disinfection. (Facilities)
- Continued efforts to recycle paper products within each area of General Accounting (Financial Services-Accounting)
- Conducted twelve P-card training for the campus. (Financial Services-Purchasing)
- Planned, Publicized and Held a Historically Underutilized Business (HUB) Economic Opportunity Forum (EOF) in mid-September, 2009 in San Marcos. Recruited the San Marcos Hispanic Chamber of Commerce and the Texas State Small Business Development Centers as co-sponsors for the HUB EOF. (Financial Services-Contract Compliance)
- Participated in the University and FSS Division recycling program for paper and plastic/metal containers. (Human Resources)

**Goal V:**

*Use of Resources and Compliance*

To ensure efficient use of University resources, monitor the University’s fiscal health, safeguard the University’s assets, mitigate institutional risk, and comply with regulatory authorities.

- Worked with Chartwell’s management to design a $20,185,386 contract extension that would cover a 10 year period. If accepted by the university nearly $14M would be spent on university facilities, making our dining centers among the finest in the nation. (Dining Services)
- University Bookstore, Dining Services, Shuttle Services, ID Services, Print Services and Copier Services all posted credits to their respective Reserve accounts. (University Bookstore)
- Snack vending contract was renegotiated and renewed for June 1, 2010 – May 31, 2011. (Auxiliary Services)
- Bobcat Bucks/Wells Fargo contract was renewed and executed for the period May 1, 2010 – April 30, 2011. (Auxiliary Services)
• Worked with the Budget Office to move construction internal orders from a high level budget commitment item to individual construction commitment line items for a more accurate report of line item expenditures. (Planning, Space Management and Real Estate - AVP and Senior Administrative Assistant)

• Worked with Accounting and Budget to move accounts and their balances from Unexpended Plant-General Fund to Unexpended Plant-Designated Method Fund. (Planning, Space Management and Real Estate - AVP and Senior Administrative Assistant)

• Developed procedures to calculate and analyze new space use efficiency standards established by the Texas Higher Education Coordinating Board on a room by room basis. (Planning, Space Management and Real Estate - Coordinator Facilities Inventory)

• Distributed the Texas State Space Use Efficiency Report to the Facilities Committee, Chairs, Deans, President’s Cabinet and others on campus. (Planning, Space Management and Real Estate - Coordinator Facilities Inventory and AVP)

• Produced multiple space reports for various offices and departments, including the FY2009 Survey of Science and Engineering Research Facilities. (Planning, Space Management and Real Estate - Coordinator Facilities Inventory)

• Reported university real property inventory to General Land Office and Texas Historical Commission within required deadlines. (Planning, Space Management and Real Estate - Real Estate Specialist)

• Worked with THECB and the Legislative Budget Board to clarify treatment of ARRA benefits, then optimized ARRA proposals to save Texas State $1.6 million in benefits while greatly simplifying treatment of ARRA funds received in lieu of formula and incentive funding for other departments and offices. (Budget)

• Designed 5-year, $8 million budget for Quality Enhancement Plan within Board of Regents tuition and fee policy limits. (Budget)

• Helped initiate the Radio Frequency ID program for Technology Resources and Materials Management. (Planning, Space Management and Real Estate - Coordinator Facilities Inventory)

• A SPCC Plan (Spill Prevention Control and Countermeasures – 40 CFR 112) was developed for the campus and the compliance component is currently 75% complete. The purpose of the plan is to provide the University with a means to prevent discharge of oil and oil based products into the waters around San Marcos as opposed to response and cleanup after a spill occurs. (EHSRM)

• Chemical Inventories - Monthly facility inspections were conducted to monitor high risk chemicals and to ensure proper segregation of chemicals and to monitor compliance with the laboratory safety standard. Provide training in chemical safety and management. (EHSRM)

• We completed year three of the Student Employee Safety Orientation training program for our student employees. 3100 student employees have completed the orientation program. The program is offered on the TRACS system and EHS&RM is working with Career Services and more recently Human Resources to maintain the program. The intent is that every student employee will complete this program within 30 days of employment. (EHSRM)

• Hazardous Waste Management - Conducted regularly scheduled waste pick-ups from facilities. Annual training for waste generators was provided and random inspections were conducted of waste generator locations to ensure compliance with EPA rules. (EHSRM)

• Revised the laboratory inspection program by conducting inspections of each laboratory on monthly basis. Labs with no deficiencies three months in a row will be changed to a quarterly schedule. There are currently 210 labs on campus and the primary focus of the
audits is working with the faculty and staff to conduct chemical inventories and improve the management and housekeeping of each lab to meet the requirements of the OSHA Laboratory Safety Standard. This is the second year of 100% compliance for chemical inventories in our laboratories. We now have a chemical baseline with which to develop a waste minimization program to reduce our chemical waste cost for the future. (EHSRM)

- Continued the implementation of the Bio safety training program for faculty, staff and students who work with biological agents. Included in the program was the development of an Exposure Control Plan for specific regulated activities and Blood Bourne pathogen training. (EHSRM)
- Implemented an assets tracking system database to track the identification, location and operability of Emergency Lights and Exit Signs on campus. (EHSRM)
- Continue to expand the Additional Duty Safety Officer (ADSO) program by adding more ADSO’s. Our current total is 120 and also conducting annual training for each. The ADSO’s serve as part of the safety network for the EHS&RM office to identify risks and potential safety issues in each of our buildings on campus. (EHSRM)
- We successfully set up several safety programs at the Round Rock Campus to include safety training, fire drills, and AED (Automated External Defibrillator) training. (EHSRM)
- OFPDC structured its team in response to the Campus Master Plan growth needs in order to meet the project schedules through the year 2015. A blended order of project management (lead by the Director) was improved upon in order to embrace the design needs of multiple Projects and the constructive demands of multiple Contractors present at both the San Marcos and Round Rock campuses. The Texas Legislature has listed the Construction Delivery Types for Higher Education to include Construction Manager at Risk (CMR), Competitive Sealed Proposals (CSP), Design-Build (D-B), and Job Order Contracting (JOC). OFPDC may select from these choices for Construction Delivery Techniques and Systems. The choice of preference for small projects within OFPDC is JOC. During 2009 OFPDC made modifications to the JOC contracts and solicited respondents from the construction industry through a Request for Qualifications (RFQ). The results of this endeavor were the following:
  - Revised JOC Contract in place with three (3) Job Order Contracting teams in place and under contract. (Facilities)
- Special Projects Team designed and implemented a Work Book to better facilitate critical project information, project order processing, and financial tracking. And OFPDC has created checklists for monitoring itself in Office procedures. The Office is constantly on the alert for ways to improve customer relations, internal office relationships, and methods of doing business for the University. (Facilities)
- Facilities Operations / Utilities completed the Agreed Order with TCEQ to mitigate Title V air permit Issue as well as negotiating an agreement to resolve an Industrial permit violation with the City of San Marcos. Also undertaking the Harris Plant Engineering assessment to identify opportunities to improve the efficiency and reliability of plant operations. (Facilities)
- Facilities Operations / Utilities received a notice from TCEQ that our public water system is in full compliance for lead and copper levels based on December 30, 2009 report. Monthly bacteriological sampling of all 30 ports for the Jackson Public Water Well on main university campus consistently prove were in compliance with TCEQ rules during period Sept 2009 through March 2010. (Facilities)
- Custodial completely revised and reissued their Workplace Area Chemical List (MSDS) notebooks throughout campus to include vehicles and building locations thereby increasing awareness and
improving the safety of cleaning operations. Custodial Operations scanned all active personnel files (over 125) and reduced two 4-5 drawer personnel cabinets into one 3 drawer cabinet. Administration followed the retention program and recycled paper. Custodial Operations has 30% of its Management Team completing, reviewing and approving their own time in Employee Self Service in SAP. (Custodial Operations)

- Irrigation-- Rerouted 4 inch irrigation water main for construction of new boiler shed at Jowers. (Grounds Operations)
- Rerouted 3 inch irrigation water main and wires away from steam line at Jowers so irrigation system could function properly. Tested all irrigation backflow devices to comply with city and state regulatory authorities. (Grounds Operations)
- Facilities Management created new procurement reports to help purchasers stay within spending limits. Re-tasked server to implement web-based reporting for use by shop supervisors and ultimately customers directly. Successfully extended the facility maintenance contract at RRHEC to allow contract renewal to coincide with the completion of the Nursing Building. (Facilities)
- This allowed the vendor the opportunity to visit the new facility resulting in a complete understanding of what will be needed for future maintenance agreements (Facilities)
- Enhanced monthly bond proceeds reporting to provide more detailed information about compliance with bond arbitrage regulations (Financial Services-Accounting)
- Completed the Annual Financial Report and submitted to Texas State University System and the State of Texas Comptroller’s Office by established deadlines (Financial Services-Accounting)
- Completed the State Auditor’s Office SACS review report for the fiscal year ended August 31, 2009, with no “material modifications that should be made to the accompanying financial statements in order for them to be in conformity with general accepted accounting principles” (Financial Services-Accounting)
- Developed and implemented new travel policies related to lodging and meals and incidental expenses per diems in accordance with the U.S. Government Services Administration guidelines (Financial Services-Accounting)
- Developed and implemented travel policy enhancements for non-overnight meal allowances and business meal reimbursements (Financial Services-Accounting)
- Developed and implemented the first phase of student organization accounting integration into SAP (Financial Services-Accounting)
- Developed Department Contract Administrator Guide (Financial Services-Contract Compliance)
- Drafted UPPS on Contract Administration and Management, and expedited adopting by Texas State. (Financial Services-Contract Compliance)
- Prepared FAQ’s on TSUS mandated background check policy for certain contracted workers. Issued communications to campus on the policy. (Financial Services-Contract Compliance)
- Cross training accounting clerk in SAP chart of accounts (Financial Services-FI Master Data Center)
- Offered two FI Master Data training programs through professional development (Financial Services-FI Master Data Center)
- SAP dual purchasing roles eliminated (Financial Services-FI Master Data Center)
- Increases and maintained employee participation in the Direct Deposit Program. Employee access for enrollment or updating of information is available through the SAP Portal under the “My Bank” tab. – YTD enrollment figures indicate 96.5% participation for those paid monthly and 88.4% for those paid semi-monthly. Employee access to enrollment was provided via online, email, fax, mail or in person. – This is a never ending process due to the influx of new employees on an ongoing basis. (Financial Services-Payroll)
• Issued in January 2010, 9,457 Annual Form W-2’s and 45 Annual Form 1042-S’s for calendar year 2009. (Financial Services-Payroll)
• Submitted all quarterly and annual employment tax returns for both the state and federal level. (Financial Services-Payroll)
• Successfully tested 2009 SAP Support Packs and Year-end Enhancements, prior to being moved to the Production database in December 2009. (Financial Services-Payroll)
• Submitted a charter for the SAP Edits for PCR Fund Restrictions-Phase I which was completed and moved into Production in December 2009. (Financial Services-Payroll)
• File Submission Enhancements to Banking Institutions Charter – completed in December 2009 and moved into Production in January 2010. (Financial Services-Payroll)
• Planned and executed the Workshop on Current Tax Issues Facing our University with tax attorney, Bertrand Harding as the presenter on February 23-24, 2010. (Financial Services-Payroll)
• Successfully reviewed and updated both UPPS and FSS/PPS including the following: (Financial Services-Payroll)
  o UPPS 03.05.01 – Soliciting, Accepting and Processing Gifts and Grants from Private Sources
  o UPPS 05.03.11 – Wireless Cellular Communication Services
  o UPPS 07.01.01 - IRS Form 1098-T
  o UPPS 01.04.01 – Claims Against the University
  o UPPS 03.01.10 – Club Accounting System
  o UPPS 03.01.11 – Employee Financial Obligations
  o UPPS 04.04.50 - Separation of Employment and Interdepartmental Transfers
  o UPPS 07.07.03 – Student Employment Procedures
  o FSSPPS 03.01.12 – Direct Deposit – Payroll and Non-Payroll Payments
  o FSSPPS 03.07.01 – Student Social Security (FICA) Exemption
• Completed negotiations with SciQuest for a new e-procurement system at Texas State (Financial Services-Purchasing)
• Established a working Board to support the e-procurement system. (Financial Services-Purchasing)
• Developed the marketing strategy and the Brand for e-procurement system: BOBCATbuys. This included BOBCATalog, BOBCATbids, BOBCATforms, BOBCATdeals, and BOBCATperks. (Financial Services-Purchasing)
• Developed and implemented a training program with three phases. (Financial Services-Purchasing)
• Completed Phase I (Financial Services-Purchasing)
• Introduced BOBCATalog to the University with 16 vendor catalogs and 200 suppliers available. Completed Phase I of our rollout. (Financial Services-Purchasing)
• Worked in conjunction with the FI Master Center to identify companies that would be invited to participate in the BOBCATalog system. (Financial Services-Purchasing)
• Completed and encumbered 2m grant funded purchase orders for the School of Nursing in Round Rock. Negotiated all contracts, rates and deliveries. (Financial Services-Purchasing)
• Worked with Competency Center to introduce an Open Purchase Order report which is much more user-friendly. (Financial Services-Purchasing)
• Participated in various audits and supplied information where needed and successfully responded to recommendations in all. (Financial Services-Purchasing)
• Served on the TOAL host committee. Helped set up details including host hotel, transportation, Mayor’s welcome. (Financial Services-Purchasing)
• Completed three major bids on behalf of the University; Janitorial, Paper, and Materials, Repair and Operations (MRO). These were done to satisfy recent audit findings. We solicited support from the departments involved, analyzed and awarded the preferred contacts on behalf of the University. (Financial Services-Purchasing)
- Passed SACS review with no negative findings. Also, provided extensive research and data for a response to a SACS inquiry relating to a former employee complaint to SACS (3/10). (Human Resources)
- Passed the Texas Workforce Commission Civil Rights Division audit of HR policies and procedures with no negative findings and a request from auditor to be able to use certain policies and procedures as models for other institutions. (2/10). (Human Resources)
- Approved two senior level students to do a study to evaluate the effectiveness of the HR website and the monthly HR Bulletin (2/10). (Human Resources)
- Completed various reports to include Medicare Data Match, ORP Participation Report, University Directory, Overtime Payments, Overtime/Comp Time Accrual and Liabilities Reports, University Service Awards, ERS Salary Changes, New Hires/Rehires/Seperations and Name Changes, Operating Statistics. (Human Resources)
- Completed research and entry of historical Tax Deferred Annuity contributions for compliance with new IRS “catch-up” regulations (11/09). (Human Resources)
- Participated in study group to assess the impact of retroactivity on closed grants (03/10). (Human Resources)
- Conducted HR module SAP year end support pack testing (11/09). (Human Resources)
- Developed H1N1 FAQ’s for web and report of sick leave for tracking sick leave absence trends (9/09). (Human Resources)
- Developed Outcome Statements and Method/Measure criteria for upcoming SACS study (9/09).
- Worked with IT and payroll staff to bring HRIS report to the State Comptroller’s Office back into compliance (Fall 2009). (Human Resources)
- Participated in the State Comptroller’s audit for OSP – 01/10. (Human Resources)
- Completion of Bank 10 fund flip - 09/09; work study fund flip for FY2010 - 09/09 and additional necessary flip of multiple academic department funds - 10/09. (Human Resources)
- Completion of Financial Aid’s correction of State of Texas work study allocation cost distribution for 64 impacted students. (Human Resources)
- Implemented the new Post 9/11 GI Bill as a new tuition adjustment program which has grown to approximately 600 participants in the first year. (Treasurer)
- Implemented SB 1304 which required universities to provide notice to students regarding the tuition set aside for financial assistance. A statement disclosing the student’s information was added to on-line receipts and transaction history as well as a mass email which is sent to all enrolled students after the census date which includes a link to the set aside information. (Treasurer)
- Significant progress was made in transitioning the student organization club account process to the SAP system. All chartered organizations were moved to SAP by March 15, 2010 with the remaining registered organizations targeted for September 2010. (Treasurer)
- Achieved PCI certification and continually evaluating process. (Treasurer)
- Created Red Flags rule notification process. (Treasurer)
- Worked with investment managers to help rewrite Operating and Endowment policies for Board of Regents Approval. (Treasurer)
- Worked with Endowment investment committee to implement new spending policy structure. (Treasurer)
- Worked with Deans/Department Heads on the distribution of the endowment spending policy. Analyzed the restricted balance of each endowment, and created report to show funds availability. (Treasurer)
- Worked with TSUS consultant on RFP and selection of credit card processor. (Treasurer)
- Worked with investment committee on hiring University Endowment investment Consultant. (Treasurer)
- Created “back of the envelope” spreadsheet to aid component schools in calculating returns while adding consistency in reporting to the TSUS Board. (Treasurer)
- Created template for system office to use in delivering investment performance detail. (Treasurer)

### Disappointments

- Because of House Bill 1096 sponsored by Representative Vo from Harrison County, University Bookstore was forced to send an email to all students at the beginning of each semester reminding them that they didn’t have to purchase their books from the university bookstore and that they could find the same books off-campus or on-line. (University Bookstore)
- As the result of a newly rewritten UPPS University Print Services will be restricted from printing university business cards, letterhead, and envelopes, even though they have been doing these items successfully for the past year. (Print and Mail Services)
- Inability to secure approval for the creation of a University Sustainability Council. (Planning, Space Management and Real Estate)
- One additional Environmental Health and Safety Specialist in the Hazardous Waste Program. (EHSRM)
- One additional Environmental Health and Safety Specialist in the Occupational Health/OSHA compliance programs. (EHSRM)
- One additional Environmental Health and Safety Specialist in the Industrial Hygiene and Laboratory Safety program. (EHSRM)
- Delayed funding of new staff positions (Financial Services)
- Delayed implementation of accounting documentation enhancements project (Financial Services-Accounting)
- Delayed implementation of the SAP Travel Module (TravelTracks) (Financial Services-Accounting)
- Not all applicable contracts are being routed through the Contract Compliance office prior to signing by an authorized Texas State Contracting Officer, nor are copies of the executed contract sent to the Contract Compliance office for record retention purposes. (Financial Services-Contract Compliance)
- Approval of funding of another position in the Property Mgmt. Office to help with the implementation of the Radio Frequency Identification (RFID) program and to help document, report and dispose of surplus computer equipment and other surplus property. This position is needed to help us be more proactive with spot check Inventories and the Annual Inventory. This position is also needed to help receive, document and tag capital equipment assets with new RFID tags. (Financial Services-Materials Management)
- Current space limitations prevent the physical movement of the Tax Specialist into the Payroll & Tax Compliance office suite. (Financial Services-Payroll)
- SAP portal upgrade postponed causing a delay in rolling out new ESS and MSS functionality as well as development of electronic PCR. (Human Resources)
- Unable to secure resources to hire an Employee Relations Coordinator. (Human Resources)
- Did not secure an electronic online job description, job audit, and GOJA library service. (Human Resources)
- Unable to implement an internal temporary services program for the campus. (Human Resources)
• Selection of Cashiering vendor was very intense. (Treasurer)

**FY 2010 Strategies**

• Dining Services will become one of the first Colleges and Universities in Texas and in the nation to begin using a 100% fully compostable cup and lid in all our retail dining locations. This will add to our already long list of sustainability initiatives in university dining services. (Dining Services)

• University Bookstore will enhance its participation in both Textbook Rental and E-books programs. Success of either program will be driven by demand in the marketplace and we will continue to push the fact that used books are still the most cost effective way to reduce the cost of textbooks. (University Bookstore)

• Reduce the number of Coin Copiers on campus by 66% and reallocate cost savings to Print Services to offset the loss of revenue from the loss of business cards, letterhead, and envelopes. (Mail and Print Services)

• Place into operation 4 additional buses 2 dedicated to the Austin/San Antonio corridor and the other two for our town routes. This should help offset the continued rise in student enrollment. (Auxiliary Services)

• Continue planning for a possible off-campus bookstore location, possibly in the Stadium North expansion or on the site of the new Alumni House. Having a location on Aquarena Springs Dr. before students get to the new Colloquium Bookstore near Thorp lane could help us deteriorate sales from that new location hopefully forcing the competition to close one or two of its current locations. (University Bookstore)

• Research printing equipment and determine if we can procure the needed equipment that would allow us to once again work with our Marketing department and their restrictive color combination they have chosen for the campus. (Print and Mail Services)

• If our Dining Contract is extended we will probably begin working on the full service restaurant to be located in the LBJ Student Center first. This would be a replacement for the University Club but would not be restricted to only faculty and staff. (Dining Services)

• Look at the opportunities that are possible when Matthews street opens in summer 2010. If Matthews street is one-way west bound the buses will be able to use it for quick access to the LBJ Student Center Bus loop. If it is decided to make that a two way street Bobcat Tram will most likely not use it and could be forced to greatly reduce the number of buses that use the N. LBJ Bus loop due to safety concerns. We are fully prepared to abandon the bus loop if safety becomes an issue. (Auxiliary Services)

• Deploy the Nextbus System so that our students will have real-time information on where their buses are along route and the approximate time it will take for their bus to arrive at their destination. (Auxiliary Servicesz)

• Work with the VPFSS and the Budget Director to adopt a more fair and equitable allocation of Administrative Overhead. Accounts like the Shuttle Bus Account and Dining Services Account, which use a limited number of institutional resources for example, HR, Accounting, Marketing and IT should not continue to pay a higher amount then say a labor intensive department like Housing, Student Center, or Campus Recreation. Additionally those E&G departments that make decisions to the detriment of the self support areas should have all their overhead funds allocated to them reduced and returned to the self support areas that have to suffer the consequences of bad business decisions. (Auxiliary Services)

• Continue planning and identification of activities and events for the Common Experience on Sustainability. (Planning, Space Management and Real Estate)
- Establish standards for classroom furniture. (Planning, Space Management and Real Estate)
- Secure Campus Tree USA designation. (Planning, Space Management and Real Estate)
- Complete the revision of the Campus Master Plan. (Planning, Space Management and Real Estate)
- Transition the building and room inventory on the VMS to the SAP Flexible Real Estate Management module and develop training for the module and offer to the campus community. (Planning, Space Management and Real Estate)
- Produce automated reports regarding Space Use Efficiency from the SAP Flexible Real Estate Management module. (Planning, Space Management and Real Estate)
- Continue to assist in the partnership agreements with the City of San Marcos related to the Research Park development. (Planning, Space Management and Real Estate)
- Look for and develop new processes to increase productivity. (Planning, Space Management and Real Estate)
- Implement strategic financial planning software. (Budget)
- Develop and push out a new ‘Budgeting 101’ class on fund accounting, account management, and the budgeting process in general. (Budget)
- Introduce an on-line business continuity template so each University department can develop an individualized business continuity plan. (EHSRM)
- To enhance the Safety Compliance asset tracking system, EHS&RM will complete the identification and bar coding of emergency safety systems. This includes all emergency lights, exits lights, alarm systems, sprinkler systems and fume hoods. (EHSRM)
- Continue to work with academic and staff areas to reduce the generation of chemical waste and to seek alternative chemical substitution practices whenever possible. (EHRSRM)
- AVP goals for the Facilities organization (dovetail w/ VPFSS goals):
  - Continuously improve customer support and provide services that are responsive to the customer’s needs.
  - Continuously improve the efficiency and effectiveness of facilities management and operations and the reliability of the utilities infrastructure.
  - Promote the professional and technical development of employees.
  - Demonstrate a commitment to the conscientious stewardship of environmental, social and economic sustainability programs.
  - Optimize the use of resources (i.e., time, manpower, budget, physical plant assets, etc.) throughout the organization. (Facilities)
- Facilities Management will develop and implement a procurement strategy that will be in full compliance w/ all legal and regulatory procurement requirements and will provide end users with materials and services on a timely basis. (Facilities)
- Custodial Operations will schedule regular meetings with customers and building managers to review the quality of custodial services, continue promoting floor polishing through OFPD&C for capital and special projects, coordinate with Deans/Chairs and staff to prioritize building spaces accordingly to maintain APPA cleaning levels 2 or 3, and reduce the overall Custodial Operations Equipment Inventory by removing old, worn and unused equipment, as well as re-assigning equipment to areas where it will be best utilized. (Custodial Operations)
- Grounds Operations will continue to enhance the campus image through additional landscaping projects, through the Tree Campus initiative, by conducting more outreach to educate the campus on the recycling program, and by optimizing the use of landscape water. (Grounds Operations)
- OFPDC submits the following:
A comprehensive schedule of all major projects will give us an improved perspective on our work load and projected project milestones.

Increase Facilities participation with TSUS in all operations concerning campus development.

Continuing Education opportunities to include Revit and COBIE training.

Certification for an additional RAS

Certifications for training of Purchasing Team Members. (Facilities)

Facilities Operations /Utilities will develop a comprehensive utilities infrastructure master plan and prioritized list of projects required to improve the reliability and efficiency of the utility systems. Will also continue with projects to improve underground piping infrastructure for Steam and Condensate, to meet the commitments made in the response to the sanitary sewer NOV, and complete the studies that are now getting underway. Also need to ascertain the condition and reliability of the infrastructure, identify the probable failure modes and time-to-failure of equipment, and establish a baseline for the operational efficiency of the infrastructure. (Facilities)

Facilities Operations /Utilities will pursue a collaborative effort with the City of San Marcos to coordinate utility master planning and to participate in electric rate structure discussions. (Facilities)

Facilities Management will be implementing several initiatives. These include enhancing the e-mail notification system for work request status changes; overhauling our building preventive maintenance program; increasing oversight of customer requests and their completion; tracking repeat service calls in the same area to identify and resolve chronic problems; and developing meaningful metrics for shop performance. (Facilities)

Facilities Management and Facilities Operations / Utilities will continue to focus on devoting sufficient resources to preventive maintenance work in order to extend the life of components, improve the reliability of the infrastructure, and improve customer satisfaction. (Facilities)

Facilities Operations /Utilities will help revive Energy Conservation efforts and develop a strategy to raise awareness of energy conservation opportunities such as turning off lights, closing open windows, adhering to space temperature guidelines, etc. Will also install utility meters to track power and thermal energy consumption and to help establish a baseline for energy savings initiatives. (Facilities)

In an effort to save energy, reduce our carbon footprint and promote sustainability initiatives we will assess the benefits of purchasing electric and alternative fueled trucks and vans. (Facilities)

Provide managers and supervisors with leadership, communications and customer service training. (Facilities)

Implement strategic plan to reorganize the Accounts Payable Office including adding new staff position from special funding from Cabinet (Financial Services-Accounting)

Plan and implement an accounting system for the Texas State Research Foundation (Financial Services-Accounting)

Fully implement the SAP Travel Module (TravelTracks) (Financial Services-Accounting)

Integrate the registered student organizations to fully integrate student organization accounting into SAP (Financial Services-Accounting)

Provide continued support to the research initiative at Texas State by continuously considering policy enhancements and business process changes related to research

Finalize plan for accounting documentation enhancements and implement plan (Financial Services-Accounting)

Review recommendations from the State HUB Disparity Study and revise office’s strategic plans to anticipate any major changes which may result. (Financial Services-Contract Compliance)

Offer procurement and contract training to those Texas State employees identified with procurement or contracting responsibilities. (Financial Services-Contract Compliance)
- SAP account setup redesign (Financial Services-FI Master Data Center)
- Assist with the Implementation E-procurement & Travel Module (Financial Services-FI Master Data Center)
- Migrate File server and PCs to Texas State computer cluster (Financial Services-FI Master Data Center)
- Begin the implementation phase of tagging University assets with new RFID technology in order to help our department and the university campus by improving inventory procedures that will help in the tracking of current asset locations. This will also help improve the efficiency and effectiveness of tracking and reporting assets. (Financial Services-Materials Management)
- Create new Policies and Procedures (UPPS) for departments directly receiving freight at their locations. This will establish what documentation must be captured and in what time frames this documentation must be submitted in order to pay invoices without late fees. (Financial Services-Materials Management)
- Implement GASB 51 “Financial and Accounting documentation of Intangible Assets”. This will impact the information captured in our AFR Note 2 submitted to the State Comptroller. (Financial Services-Accounting, Materials Management)
- Document and update the Construction-in-Progress procedure for capturing the componentization of Buildings in order to be in full compliance with the State Comptroller’s policies under the State Property Accounting (SPA) guidelines. (Financial Services-Materials Management)
- Submit a business plan to increase the size, functionality and capacity of the University Distribution Center or have another storage building built or rented to provide more storage space for university departments. This additional space is needed to meet the increase in storage for university research initiatives and the construction of new buildings and residence halls that meet the needs of a growing institution. (Financial Services-Materials Management)
- Update the Materials Management UPPS 05.01.02 “University Surplus Property” with new criteria relating to surplus property auctions and IT security issues and procedures for the disposal of surplus computers and other electronic assets with IT storage capabilities i.e. printers and cell phones. (Financial Services-Materials Management)
- Review of industry business rules for Electronic W-2’s and comparison to the Texas State process. Recommendations for changes and improvements will be presented in the form of a charter to the SAP HR Stakeholder’s Group. (Financial Services-Payroll)
- Submission/Completion of Retroactivity Solution for Closed Grants Charter using Best Business Practices with the OSP Sub-Committee addressing the HR/Payroll concerns. (Financial Services-Payroll)
- Design, test and implement SAP Time & Effort Reporting Module using Best Business Practices. (Financial Services-Payroll)
- Review and implement new federal legislation for the HIRE Act passed in March 2010. (Financial Services-Payroll)
- Review and implement new federal legislation for the Health Care and Education Reconciliation Act passed in March 2010. (Financial Services-Payroll)
- Implementation of Windstar Tax Navigator’s FNIS program – a web-based tool for use by international faculty, staff and student employees, as well as other international visitors to Texas State. FNIS provides the means via the internet whereby required data is input, reviewed and then uploaded into the University’s database. Currently, paper forms are utilized and then manually entered into the database. (Financial Services-Payroll)
- Continue to develop and provide metric/analytic reports to senior management. (Human Services)
- Organize metrics data to create HR Profile for restricted viewing on the HR website for the University and each Division. (Human Services)
• Implement drug testing requirements of UPPS 04.04.18 Drug Testing for Non-Faculty Employees. (Human Services)
• Secure completion and implementation of the administrative support staff training course. (Human Services)
• Continue development of an electronic PCR process. (Human Services)
• Implement updated PeopleAdmin software (v.7). (Human Services)
• Meet SACS requirements. (Human Services)
• Continue to develop and provide metric/analytic reports to senior management. (Human Services)
• Expand functionality in SAP for ESS and MSS capabilities. (Human Services)
• Map out transition plan to discontinue legacy system usage. (Human Services)
• Update TDA and ORP vendor regulations. (Human Services)
• Explore securing product neutral financial education seminars for faculty and staff from our approved TDA/ORP vendors and other sources. (Human Services)
• Improve service award eligibility tracking process. (Human Services)
• Continue to work on SIS project. Part of e-commerce system to be implemented in August 2010. (Treasurer)
• Work with University Advancement to create cohesive donor statement. (Treasurer)
• Continue to work with investment committee and University Endowment consultant on new asset allocation and investment with six new money managers. Continue training on red flags rule and PCI. (Treasurer)