1. Support Services Report Template

Report Info

Name of the person completing this report: Darrell Haydon
Title of the person completing this report: AVP Financial Services
Supervisor/dean reviewing report: Brad Wells
Service: Oversee departmental programs and provide administrative support services
Division/College: Administration and Finance

3. Mandated Service

Link to Scoring Rubric

1.1 Please indicate below if any aspect of the service is legally mandated by any of the following and provide the relevant reference.

- Federal Law: IRS Tax Reporting Requirements
- State Law: Numerous Education Code Sections
- Executive Order: Executive Order 1000 and many others
- Title 5: CA Code of Regulations
- Campus Policy: CSU ICSUAM

Provide a brief explanation, if necessary, in < 60 words.

Service oversees a diverse group of business operations including procurement, accounting, budgeting, university clubs, student finance, cashiering operations, etc. Each area includes a unique set of laws, rules, policies and guidelines that define how services will be performed and measured.

4. Importance of Service

Briefly describe the service in terms of its primary function(s) and purpose(s) using <120 words

- Critical role with a direct impact to the operational success of the University.

Link to Scoring Rubric

2.1 Who are the primary receivers of this service? (Please enter the percentage of each user group that is relevant)

- Students: 10%
- Faculty: 20%
- Administrators/staff: 30%
- Colleges/departments: 30%
- Other: 10%
- Total: 100%

Link to Scoring Rubric

2.2 Please indicate the direct or indirect impact of the service on students for each of the three University Action/Student Impact Areas listed below (for example processing financial aid applications would be direct impact on students while managing utility services would be indirect).

<table>
<thead>
<tr>
<th>Direct Impact on</th>
<th>Indirect Impact on</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Provide a brief narrative (<60 words each) explaining your selection for each area.

<table>
<thead>
<tr>
<th>Area</th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>Insure that accounting and fiscal services operate effectively and efficiently to support the rest of the university to fulfill their basic mission and purpose to serve our students.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>Focus on the timely completion of transactions and support requests from the colleges and other student facing organizations. Accurate posting of charges and payments to student accounts. Timely posting of financial aid to student accounts and prompt issuance of student refunds.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>Supervise the collections process to make sure students clear any remaining balances owed to the university.</td>
</tr>
</tbody>
</table>

Link to Scoring Rubric

2.3 Applying the four choices presented below, please indicate the consequence of NOT having this service on each of the actions in the left hand column.

<table>
<thead>
<tr>
<th>Area</th>
<th>4 - Service provides evidence of direct impact in more than one area</th>
<th>3 - Service provides evidence of direct impact in one area</th>
<th>2 - Service provides evidence of indirect impact in more than one area</th>
<th>1 - Service provides evidence of indirect impact in one area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
</tr>
</tbody>
</table>

Provide a brief narrative (<60 words each) explaining your choice.

<table>
<thead>
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</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>Minimal short term impact. Longer term impact would increase likelihood that the procurement, finance and accounting functions would become ineffective and less efficient.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>The effective management of the university's fiscal resources and compliance to a host of state, CSU and university policies enables the colleges and divisions across the university to process financial transactions, manage budgets and spending, obtain resources to fulfill their mission and measure overall financial effectiveness.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>Not much impact to this group of students.</td>
</tr>
</tbody>
</table>
### 2.4 Alignment with Shared Strategic Commitments

How does this service contribute to or align with any of the eight Shared Strategic Commitments (SSC) listed below?

<table>
<thead>
<tr>
<th>SSC</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reinforce academic quality through open-minded inquiry, innovative teaching, engaged learning, and distinguished scholarship</td>
<td>Insure that funding and business processes exist and operate properly to support the purchasing and accounting needs of the colleges and other University departments.</td>
</tr>
<tr>
<td>Enhance our inclusive campus, responding to the backgrounds and interests of our diverse community and promoting their academic, professional and personal development</td>
<td>Accounting support for the diverse variety of University clubs helps to support inclusive nature of the University.</td>
</tr>
<tr>
<td>Serve students first, by expanding access and enhancing each student's educational experience and prospects for success as a graduate and life-long learner</td>
<td>Meeting student needs and answering their questions within the Student Finance and Cashiers department helps students to overcome administrative hurdles to becoming and staying enrolled.</td>
</tr>
<tr>
<td>Foster a vibrant community through enriched student services and student life that support student engagement and learning</td>
<td>Directly provide procurement and accounting support for all University clubs.</td>
</tr>
<tr>
<td>Contribute to a sustainable planet through our academic programs, university operations, and individual behavior</td>
<td>Organization focus on green procurement, paper and toner recycling and redeploying surplus University furniture and computers to local community organizations.</td>
</tr>
<tr>
<td>Continuously improve our efficiency, transparency, and accountability while practicing mutual respect, responsiveness, and collaboration across the University</td>
<td>Focus on meeting the expanding informational and support needs of the broader University community with an extensive ranges of expense reports, budget summaries, user guides and knowledgeable and friendly staff members that work closely with a diverse student base and across the academic and administrative units.</td>
</tr>
<tr>
<td>Support the civic, cultural, and economic life of all communities in the regions we serve through partnerships that promote education and social responsibility</td>
<td>Provide fiscal service to all campus based grant programs that serve our campus and the local community including the Hayward Promise Neighborhood initiative.</td>
</tr>
<tr>
<td>Demonstrate our continuing record of leadership and innovation in higher education, focused on 21st century skills, including science, technology, engineering, and mathematics (STEM)</td>
<td>Increased usage of technology to better communicate to our students, staff and faculty. Starting migration to smart phone apps to reach and more easily interact with students.</td>
</tr>
</tbody>
</table>

### 2.5 How might the demand for this service change over the next five years? (Please choose one category below).

Likely to increase

**Provide a rationale for your choice (assumptions, impact of new policy, etc.) in <120 words.**

The need to coordinate, supervise and support the complex operational activities in Financial Services will increase: as the number of students we serve grows; as we drive to improve our service model; and as we work to integrate a steady stream of new state and CSU mandates into our existing business processes.
3.1 Do you assess the **quality** of the service you provide?

Yes

If “Yes”, what benchmarks, best practices or measures of success, either internal or external, do you use to measure service **quality** (e.g., timeliness, accuracy, adequacy, meeting deadlines, satisfactory completion of assignment, etc.)? Please describe in <120 words. If no, please explain.

Seek out feedback from customers, look for operational bottlenecks and work with a variety of customers to streamline business processes.

**Link to Scoring Rubric**

3.2 During the last three years, have you adopted any measures to improve the **quality** of this service? Please describe in <120 words.

The Financial Services organization expanded its operational service to the University's auxiliary organizations giving them access to a more extensive set of services and expertise. This change eliminated multiple overlapping and confusing business processes into one standard process for all campus organizations.

**Link to Scoring Rubric**

3.3 What idea(s) do you have for improving the **quality** of this service within existing resources (e.g. development of benchmarks, surveys, feedback, etc.)? Please describe your plan(s) in <120 words.

Extend focus for customer service by proactively engaging the colleges, divisions and units within the University. Increase financial information and transparency by generating financial reports, equipment listings and business process guides to campus customers.

**Link to Scoring Rubric**

3.4 What ideas do you have for improving the **quality** of the service if additional resources were provided. Please describe your idea(s) in <120 words.

Realigned delegation of authority process will streamline the approval and decision making process, increase management ownership for results and increase awareness and understanding of operational and financial perform across the University.

**Link to Scoring Rubric**

3.5 Do you use any formal or informal process to assess the level of satisfaction of the service users?

Yes

If yes, describe the process and most recent results in <120 words. If no, please explain.

Proactively seek feedback and input from the campus community on how to more effectively meet their financial and operational needs.

**Link to Scoring Rubric**

3.6 The university recently conducted a customer satisfaction survey for some services (results for this service are attached, if applicable). Do you have any comment or response to the results? Please describe in <120 words.

N/A

**Link to Scoring Rubric**
3.7 Do you have any formal or informal guidelines for personnel in your department regarding how to treat/interact with receivers of this service?

Yes

If yes, please describe in <120 words. If no, please explain

Numerous guidelines and standards exists to insure that business operations meet expectations.

Link to Scoring Rubric

3.8 Does your service have annual goals (targets) of achievement regarding the **quality** of the service provided?

Yes

If yes, describe the annual quality goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.

Indirectly each operational area has established expectations and escalation processes if customer needs aren't being properly met.

Link to Scoring Rubric

3.9 Does your service have annual goals (targets) of achievement regarding the **quantity** of service provided?

No

If yes, describe the annual quantity goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.

Focus is to meet the needs of the University and properly manage any increase or decrease in the volume of activity. In general, the number of unique transactions or activities is growing each year.

6. Efficiency of Service (cost effectiveness)

Link to Scoring Rubric

4.1 Using the spreadsheet provided for all employees in your department, please distribute salaries of individuals across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

276883

Attach your allocated spreadsheet here.

2010-11 Expenses - Oversee department programs - Financials.xlsx

Link to Scoring Rubric

4.2 Using the spreadsheet provided, please distribute your department's annual operating expenses across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

139214

Link to Scoring Rubric

4.3 Using the spreadsheet provided, please distribute the square footage of work space across all services provided to reach an educated or reasonable estimate of the use of this resource.

268
4.4 During the last three years, have you adopted any measures to improve the efficiency (cost effectiveness) of providing this service (e.g. reducing salary costs, operating expenses or use of space, or increased output without increasing cost. Etc.)?

Yes

If yes, please describe the measures in <120 words. If this is a new service introduced over the past three years, please indicate. If no, please explain.

Financial Services has expanded its customer base to include the auxiliary organizations. New business processes have been established and new services are now available to the University community while reducing the overall cost of providing the service. Examples include: expanded reporting solutions from the CFS Date Warehouse, new PCard program, Express POs, an expanded Bay Card program, upgraded duplication and reproduction capabilities and a high level of contract management support.

4.5 What idea(s) do you have for improving the efficiency (cost effectiveness) of this service within existing resources (e.g. restructuring, merging, outsourcing, ways to cut costs, technology, etc.)? Please describe those ideas in <120 words.

Continued focus on extending our customer service model outward into the University community to better understand and meet organizational needs, improve support planning and increase service and reporting capabilities.

4.6 What idea(s) do you have for improving the efficiency (cost effectiveness) of the service if additional resources were provided. Please describe your idea(s) in <120 words.

Additional resources could be used to expand our ability to generate financial reports to end users, to implement workflow, improve document imaging and extend training and support services to our campus customers.

4.7 Do you have any plan(s) to improve the efficiency (cost effectiveness) of this service in the next 1-2 years (e.g. reducing costs, increasing productivity, etc.)?

Yes

If yes, please specify whether these plan(s) involve reducing salary costs, operating expenses and/or use of space. Please describe your plan(s) in <120 words. If no, please explain.

Focus is on increasing productivity. A proactive customer service model will enable Financial Services to better meet our customer needs, reduce rework and improve efficiency.

4.8 Please describe the estimated output for this service for fiscal year 2011-12, quantify if possible (e.g. volume, service tickets resolved, people serviced, appointments, etc.) in <120 words.

Numerous way to measure output including: Counting transactional activities; Measuring operational process results; Improved financial results; Increase satisfaction; and A reduction in escalations and urgent requests.
7. Other

Link to Scoring Rubric

5.1 Are you aware of services similar to this one that are being provided by another department at CSU East Bay?

No

If yes, please provide a list of those departments. How are the services described here similar or different? Please describe in < 60 words.

Link to Scoring Rubric

5.2 Is there anything unique or distinctive about your service? Please describe what is unique or distinctive in <120 words.

This service combines a unique combination of accounting, reporting and operational activities that is unique on campus.

Link to Scoring Rubric

5.3 Are there any additional things about this service that you would like the task group to know? Please describe/explain in <250 words.

This service requires a diverse set of skills and knowledge to properly meet the needs of the University community while also maintaining compliance with a significant amount of state legal, regulatory and CSU driven mandates, policies and guidelines.