1. Support Services Report Template

Report Info
- Name of the person completing this report: Brad Wells
- Title of the person completing this report: Vice President Administration and Finance and Chief Financial Officer
- Service: Prepare and distribute university policies
- Division/College: Administration and Finance

3. Mandated Service

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

Executive Order: 731, 1059

Provide a brief explanation, if necessary, in < 60 words.
- EO 731 requires the campus president to designate a chief financial officer to carry out duties established by statute, regulation, or policy
- EO 1059 designates the chief financial officer as the primary responsible official regarding administrative compliance and fiscal oversight of campus auxiliary organizations

4. Importance of Service

Briefly describe the service in terms of its primary function(s) and purpose(s) using <120 words
- Develop, review, approve, and distribute policies governing responsibilities within the division of Administration and Finance and as otherwise assigned by statute, regulation, or policy

2.1 Who are the primary receivers of this service? (Please enter the percentage of each user group that is relevant)
- Students: 25%
- Faculty: 25%
- Administrators/staff: 25%
- Colleges/departments: 15%
- Academic Senate and/or committees: 5%
- Alumni: 3%
- Community outside University: 2%
- Total: 100%

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>Policies governing application fee payments may affect applicants</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>Policies governing financial, logistical, and service issues on campus have a direct impact on student enrollment, attendance, and graduation</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>Policies governing administration of alumni and donor funds may have a direct impact on continued engagement with the university</td>
</tr>
</tbody>
</table>

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>
<tr>
<th>Area</th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each selection)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>Limited impact of policies on student applicants, however, if poorly developed or implemented could have a negative effect</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>Policies implemented without attention to consequences for students may have inadvertent negative effects on success</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>Limited impact of policies on alumni, however, if poorly developed or implemented could have a negative effect</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>Reinforce academic quality through open-minded inquiry, innovative teaching, engaged learning, and distinguished scholarship</th>
<th>If aligned or contributing, provide a description. (&lt;60 words for each SSC)</th>
</tr>
</thead>
<tbody>
<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>Publication of MPP guidelines (UED 11-07) help support an inclusive campus environment</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>Publication of UED 11-04 provided broader distribution and visibility of this key campus policy governing access and use of campus property</td>
</tr>
<tr>
<td>Foster a vibrant community through enriched student services and student life that support student engagement and learning</td>
<td>Modification of parking fee policy in June 2013 providing free parking on Friday evening and weekends enhanced community engagement</td>
</tr>
<tr>
<td>Contribute to a sustainable planet through our academic programs, university operations, and individual behavior</td>
<td>Policies implemented to utilize single stream recycling, LEED building design requirements, and alternative transportation program funding help advance efforts in this area</td>
</tr>
<tr>
<td>Continuously improve our efficiency, transparency, and accountability while practicing mutual respect, responsiveness, and collaboration across the University</td>
<td>Publication of university executive directives (UEDs) on the staff hope page enhance accountability and transparency through broad communication</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></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></td>
</tr>
</tbody>
</table>

**Link to Scoring Rubric**

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

- Likely to stay the same

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

Policy development and distribution reflects changing circumstances at the system, state, and federal level and are likely to continue as new approaches are developed

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5. Quality of Service

**Link to Scoring Rubric**

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.

We solicit informal responses to promulgated polices and during collaborative phase of policy development solicit feedback and comments routinely
3.2 During the last three years, have you adopted any measures to improve the quality of this service? Please describe in <120 words.

We established a central location and format for university wide policies, referred to as University Executive Directives, and established a single location on the staff home page to provide an accessible reference for these policies.

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.

Develop a formal response system so that persons can respond directly to issues raised by policy changes and convert all university policies to the UED format and location to facilitate greater awareness.

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.

If the university were to adopt a campus wide electronic document storage solution, retrieval and distribution of policies would be enhanced. However, the cost of such a system would be much higher than the potential benefits for this one service.

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.

We use informal consultation regarding the impacts of proposed policies in addition to formal consultation for those policies that require broader discussion.

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

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.

Each policy must clearly identify the source of authority to issue the policy, the responsibility to implement provisions of the policy, and the accountability for failure to follow policy.

3.8 Does your service have annual goals (targets) of achievement regarding the quality of the service provided?
No

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.

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.

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.

49977

Attach your allocated spreadsheet here.

PDF Worksheet VP Admin and Fin.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.

44818

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.

62

Attach your allocated spreadsheet here.

PDF Worksheet VP Admin and Fin.xlsx

Link to Scoring Rubric

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.

We developed a standard format for university executive directives, which has helped to streamline the development and distribution
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.

Fewer polices that provide broader guidelines rather than proscriptive procedures would make the policy promulgation process more efficiencies

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.

If the university were to adopt a campus wide electronic document storage solution, retrieval and distribution of policies would be enhanced. However, the cost of such a system would be much higher than the potential benefits for this one service.

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.)?

No

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.

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.

Indeterminate

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

Yes

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

Each division provides a similar service

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

Affects business and finance areas
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.