1. Support Services Report Template

Report Info

Name of the person completing this report: Cheril Musser
Title of the person completing this report: Divisional Analyst
Supervisor/dean reviewing report: Linda Dalton, VP PEMSA
Service: PEMSA Administrative Support
Division/College: PEMSA

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.

Executive Order: All Finance and Human Resources
Campus Policy: All Campus and CSU Policies
Any other: CA State Controller’s Office

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

All financial, accounting, and human resources procedures and forms processed by the administrative staff are mandated and regulated by Executive Orders (e.g., travel, payment processes); statewide CSU policies (e.g., vendor tax ID, conflict of interest, FERPA) and/or CSUEB campus polices (e.g., Hospitality Expenses, reimbursements, acceptable credit card purchases & limits, personnel transactions)

4. Importance of Service

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

The PEMSA administrative support unit provides centralized and coordinated services to 125+ PEMSA staff at large and 100 student assistants through a small core of staff. The primary purpose is to ensure consistent, accurate compliance with CSU and University policies and procedures for all administrative processes.

Process all the internal HR transactions:
- hirings for new employment, retired annuitants, temps
- promotions, reclassifications, temp appointments, reassignments
- resignations, retirements
- family/medical/disability leaves.

Payroll attendance reporting for all staff, student assistants, retired annuitants, special consultants, and temporary employees.

Process all:
- purchase orders
- travel claims / travel arrangements
- supplies, equipment
- reimbursements, invoices, check requests
- workstation relocations, Facilities service requests

- misc support to VP and AVPs
- Scheduling meetings, calendaring
- Coordination & preparation of recruitment interviews

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

Administrators/staff: 75%
Colleges/departments: 25%
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 Students</th>
<th>Indirect Impact on Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>✔️</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>✔️</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>✔️</td>
</tr>
</tbody>
</table>

Provide a brief narrative (<60 words each) explaining your selection for each area.

<table>
<thead>
<tr>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each)</th>
</tr>
</thead>
<tbody>
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</tr>
<tr>
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</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>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>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td></td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>East Bay) After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<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>Pre-college (helping students to enter the system)</th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each selection)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Without this support service to all of PEMSA’s departments, it would greatly reduce the efficiency of Enrollment Development (recruitment), Admissions, and Financial Aid’s ability to provide quality student services.</td>
<td></td>
</tr>
</tbody>
</table>

| During college (helping students succeed while they are at Cal State East Bay) | Without this support service it would greatly reduce the efficiency of all of PEMSA’s units to provide quality student services. |

| After college (helping students establish meaningful lifework and be socially responsible contributors to society) | Without this support service it would reduce the efficiency of the Registrar’s Office to provide quality student services to graduates. |

Link to Scoring Rubric

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></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></td>
</tr>
<tr>
<td>Foster a vibrant community through enriched student services and student life that support student engagement and learning</td>
<td></td>
</tr>
<tr>
<td>Contribute to a sustainable planet through our academic programs, university operations, and individual behavior</td>
<td></td>
</tr>
<tr>
<td>Continuously improve our efficiency, transparency, and accountability while practicing mutual respect, responsiveness, and collaboration across the University</td>
<td></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>
</tbody>
</table>

Access - Efficient administrative support of the budget, expenditures, and business processes for the Enrollment Development Counselors, Education Summits and all PEMSA sponsored events for students, such as, Preview Day, Welcome Day and Orientation. Student Experience - support for all administrative processes in PEMSA.

Continuous attention to accuracy and detail of administrative processes; consistent application of CSU & CSUEB policies/procedures; culture of service with timely completion of financial and administrative services for PEMSA staff and for the Finance and HR staff.

African-American, Latino, and Asian/Pacific Islander Education Summits support through the management of all the summit budgets and the processing of expenditures, insurance/vendor requirements, deposits for the committees comprised of CSUEB staff in cooperation with other local colleges, Alameda Office of Education, Hayward Chamber of Commerce, and regional high schools.
Demonstrate our continuing record of leadership and innovation in higher education, focused on 21st century skills, including science, technology, engineering, and mathematics (STEM).

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 for administrative support is likely to increase as managing enrollment requires more detailed attention, the demand for student services increases, and as federal, state, CSU and university regulations expand.

5. Quality of Service

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.

- Very quick and accurate internal processing of all administrative forms and documents that need to be routed to external departments for payment and disbursement through the Accounting, Purchasing, and Human Resources offices.
- Attendance/Payroll, personnel transactions, invoice payments, end-of-year fiscal deadlines are always met.
- High degree of accuracy on all administrative forms and documents processed.
- Receive very positive feedback from the external departments with whom the Admin Unit is in contact, and very positive feedback from the managers and staff in PEMSA to whom we provide administrative support.
- Positive feedback from external departments

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

On-going review of administrative internal processes, such as paycheck pick up and distribution, for regular staff and student assistants; internal attendance/payroll records and documentation; cross-trained another administrative employee to support staff with travel claims and policies; on-going revision of internal forms. Position descriptions have been brought up to date and procedures streamlined as new staff have been hired to replace retirees.

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.

Staff receive training on an on-going basis to stay current with new software, university procedures, etc. As a result, the administrative support unit can continuously improve the quality of services to the other PEMSA units.
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.

Additional resources would enable to the unit to increase staffing for full coverage throughout the work week, as several employees work part-time.

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.

Informal process is the continuous positive feedback received from the PEMSA staff and expressions of appreciation along with verbal recognition for the Administrative staff's work and support.

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.

Not covered in the survey.

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.

The administrative unit shares PEMSA's culture of service. Everyone in the Administrative Unit operates under the guidelines that we respond quickly to all requests and need for assistance; to help staff resolve problem areas with attendance approvals, hiring processes, insurance requirements; understanding of travel policies, etc. with professionalism while maintaining constructive working relationships with all our colleagues.

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.

- Effective administrative support for the Vice President.
- Continue to meet deadlines regardless of external procedural changes to business processes.
- Maintain a high degree of accuracy in preparation of all business forms, attendance reporting, and personnel transactions for staff and student assistants.
- Effective communication with staff regarding all CSUEB policies and procedures that pertain to purchases, travel, attendance reporting, and personnel transactions.
- Continue to open and sort hundreds of daily mailed student documents and transcripts for timely routing to Admissions, Records, and Financial Aid.

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.

Providing quality administrative support is not about the quantity of service. It is about efficiency, accuracy, timeliness, dependability, adherence and up-to-date knowledge of CSU and CSUEB policies and guidelines, good administrative and interpersonal communication skills.

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.

182247

Attach your allocated spreadsheet here.

Budget & Admin Support Allocations.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.

368

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.

624

Attach your allocated spreadsheet here.

Budget & Admin Support Allocations.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.

The unit took advantage of the retirement of long-time staff member to revamp internal processes, resulting in greater efficiencies.
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.

A centralized administrative support unit is already a much more efficient way to provide these services in PEMSA as it relieves individual units from duplicating routine services, leads to greater efficiencies in purchasing, and assures consistency and timeliness in handling a wide range of needs.

**Link to Scoring Rubric**

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.

A number of University procedures continue to require manual intervention. The work of the PEMSA administrative support staff would become more efficient if more University resources were devoted to automating and streamlining routine procedures. (e.g. Attendance on line reporting still relies heavily on manual paper reporting for leaves without pay, FMLA, maternity and paternity leaves, and earning CTO credits.)

**Link to Scoring Rubric**

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.

As with the quality of service, ongoing staff training contributes to greater efficiency.

**Link to Scoring Rubric**

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.

- All monthly attendance/payroll reporting for 125+ staff and 100 student assistants.

- All internal personnel transactions for 125+ staff and 100 student assistants. Processed approximately 180 eSAFs for staff involving hires, change of status, family/medical/NDI leaves, separations, etc.

- 20 contracts totalling $120,280 with scopes of work, job specs, and quotes.

- 105+ Purchase orders

- 75 check requests payments and/or reimbursements

- Over 60 College Fair registrations for recruiters.

- Oversight and/or processing $105,000 in travel claims for Enrollment Development recruiters and professional staff development/meetings.

- Oversight of 6 University credit cards for adherence to restricted/non-restricted purchases. 72 monthly credit card reconciliations and approvals per year totaling $106,673 for submission to to Accounting.
7. Other

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.

Other divisions may have centralized administrative support services, but they are provided within their division. While similar, they would not duplicate PEMSA’s. From our knowledge of the University, we understand that this administrative support is more centralized in PEMSA than in the other large divisions. This works in PEMSA because of the close relationships among the units in this division.

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

The distinctive aspect of the PEMSA Administrative Support unit services is its centralized organization with six employees who are essentially administrative specialists. They are able to provide a higher level of expertise, knowledge of procedures, policies, and business processes than multiple persons with minimal, generalist knowledge assigned out to each of the departments that average on the size of 10-15 staff. Currently the ratio is 1 administrative support person to 23 regular staff. It also also prevents duplication of services with fewer staff thereby maximizing efficiency.

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.

PEMSA support services have been consolidated for many years - starting in 2002 under earlier organizational structures at East Bay. At that time it was known as Enrollment Services comprised of Admissions, Registrar and Records, Financial Aid, Student Data Systems, and Enrollment Development. Later when Planning & Institutional Research was added, it became Planning and Enrollment Management.

At a time when annual budget cuts were ongoing, the AVP who was then in charge evaluated how efficiently budget and administrative support was provided in the different departments. It was determined that there was a lot of duplication of administrative services and non-sharing of funds and resources that could be more efficiently used centrally by the Office of the AVP for the operations at large across all departments. Since office supply orders, purchase orders, contracts, travel claims, HR personnel transactions, and other administrative processes are not static, the centralization of these processes provides for a more efficient use of limited administrative resources as support needs fluctuate throughout the year between departments. This is also true of budget resources. Centralization also provides a higher level of expertise, as well as consistent application of policies and procedures.

When several Student Affairs units joined the prior division of Planning and Enrollment Management in 2009, the administrative support staff began to serve them as well, without additional staffing. In addition, when the centralization process was implemented in early 2000’s we had 80+ staff and now we have 120+ staff with the same level of support.