

CSUSB
Division of Administration and Finance
2002 Department Visits Review
January 30, 2004

The division of Administration and Finance is interested in obtaining feedback from its customers. Customer participation is vital to the division's goals and Balanced Scorecard quality improvement programs. Not only is customer input needed to see if departments are meeting their goals, but also to create future goals that will better meet the changing environment and needs of the university. The following report shares key concerns that were raised during the 2002 campus department visits and responses by Administration and Finance departments.

Accounting – Office of the Director

1. *Need advance warning of policies.*
 - General Accounting has been posting procedural changes and policies to the CMS Info website and messages are sent out from CMS Info with the various updates.
2. *Dislike for the new financial system (PeopleSoft).*
 - During the last three years, campus users have been becoming more familiar with PeopleSoft and the various reports.
 - Queries have increased timeliness in obtaining financial information.
 - With the 2004/05 PS 8.4 upgrade, there will be a report writer portion that will allow the end users more drill down features.

Accounting – Accounts Payable (AP)

1. *Slow turn-around time for travel reimbursement.*
 - The average turnaround time from the time AP has received the travel claim to date of check issuance has been approximately 14 calendar days.
 - It was discovered that the paperwork took 7 to 10 days to arrive in the AP office, which could give the appearance of an extra week of processing time to the claimant.
2. *Travel claim guidelines too complex and inflexible.*
 - Travel Claim guidelines come from the Chancellor's Office and are written to comply with the Internal Revenue Service requirements to qualify as an accountable plan and the State Controller's Office requirements for reimbursement.
3. *Concerns regarding travel claims being returned, resubmitted, and returned again.*
 - Travel has been stressing in workshops that the individuals preparing travel expense claims do so carefully—that they double check the claim before they submit it and use a check list.
 - Travel has provided "Record Keeping" tips on the Travel web site (<http://admnacct.csusb.edu/admnacct/travel/travelindex.htm#records>).
 - Monthly Travel Tips have been sent to campus@csusb.edu to advise the campus community of common travel problems to avoid.
 - Monthly notices are sent to departments and claimants with outstanding travel expense claims exceeding the submission deadline.

Accounting – Bursar

1. *Petty Cash disbursements take longer than before.*
 - Petty cash turn around is now approximately three to four days unless there are problems with the submittals.
2. *Unhappy with the check pick-up procedure.*
 - The Bursar offers departments the choice of picking up end-of-quarter checks or having the employees do so.
 - Staff listen and learn from each payroll disbursement in order to improve the processes.

Accounting – Payroll1. *Payroll turn-around time.*

- Payroll has improved its turnaround processing time tremendously—(from seven to ten days) to one day.

Accounting – Student Accounts1. *Processes are cumbersome (due to changeover in staff).*

- Cross training is in progress and procedures are being updated as needed.

2. *Are student complaints addressed?*

- Office staff encourages students to complete the point-of-service survey available at the counter. Surveys are reviewed periodically to help determine areas requiring improvement.
- Students can meet with the Student Accounts supervisor to further discuss their individual issue(s). If a student is still not satisfied, he/she is referred to the Director of Accounting for assistance.

Budget1. *PeopleSoft Issues.*

- Offered more training.
- Developed new reports and queries.

2. *Offer more Budgetary training.*

- Offered a Reconciliation Workshop (several times).
- Offered a Budget Projection Workshop.

3. *Budget book takes a long time.*

- Information is posted on the Budget web page (http://finance.csusb.edu/budget_office.htm) as it is received so the main information that is used is available sooner.

Capital Planning, Design and Construction (CPDC)1. *Frustration over the procurement, design development and installation of system furniture.*

- Campus requests are referred to an outside design consultant, and CPDC continues to play a liaison role of coordinating the design development and installation of system furniture.

2. *Department representatives are unhappy with the design of the building they occupy.*

- CPDC has broadened the involvement of building users in the design processes and encourages different stake holders to have direct communication with the design team.

3. *Mitigate the impact of Santa Ana winds.*

- A wind tunnel test was performed. Based on the results of the test, a number of building modifications and landscape redesigns were incorporated.

4. *Customer service issues*

- CPDC will strive to improve the customer services and collaborative working relationships to departments, particularly in the areas of communication and feedback.

Commuter Services1. *Commuter forms should be completed online.*

- The monthly log has been added to the Commuter Services website, and can be completed online.

2. *Shuttle services from Metrolink station to campus.*

- Commuter Services staff are working with ASI and the Omnitrans Planning Department to determine needs/requirements of this type of service.

3. *Shuttle and vanpool services around campus.*

- Commuter Services staff are working with ASI and the Omnitrans Planning Department to determine needs/requirements of this type of service.
- There are currently four vanpools to CSUSB. Commuter Services markets or solicits for new vanpools on a monthly basis.

Event Scheduling

1. *Charges for events (such as utilities or unlocking for the event).*
 - The Facilities Use Policy (<http://facilities.csusb.edu/Policies/BuildingGroundPolicy.asp>) can be found online and provides descriptive information regarding fees (“X. FACILITY USE FEES”).

Facilities Services (FS) – Automotive Maintenance

1. *Rental cars (Enterprise) – cleanliness and maintenance.*
 - Enterprise was advised of the complaints, service improved and the complaints have ceased.
2. *Automotive expenses.*
 - Departments are given the option of using outside services for vehicle maintenance. (Proof of routine services performed must be forwarded to FS and kept on file in the Automotive Administration office.)
 - Though FS adds an administrative cost to campus fuel, departments have the option of refueling vehicles off-campus (using a Voyager gasoline card). The costs of campus fuel are still far cheaper than outside service stations.
3. *Communication.*
 - Automotive staff have been reminded to quickly respond to customers. Additionally, administrative assistance (x5178 or x5166) can assist in communication to mechanics.

Facilities Services (FS) – Building Maintenance (BMC)

1. *Cost of work performed.*
 - BMC continues to evaluate pricing based on RS Means construction guides and by checking the local market.
 - If it is more cost effective to out-source services, that course of action is taken.
2. *More service follow-up needed.*
 - Spot checks continue to be performed on the services provided.
 - Additionally, the online work order website (<http://facilities.csusb.edu:100/home.html>) allows customers to track and respond to the status of their work order.
 - a. An online survey (<http://surveys.csusb.edu/58512.htm>) allows customers to provide input about the service they received.

Facilities Services (FS) – Custodial Services (CS)

1. *Changes in service level due to custodian turnover.*
 - The CS Manager makes a tremendous effort to provide stability to his workforce and the campus by keeping custodians in buildings as long as possible.
 - Custodial rotations do occur periodically to cover while other staff are off work (sometimes temporarily and sometimes for extended periods of time) and provide staff with a variety of experiences in cleaning various buildings/areas on campus—this broadens their knowledge and provides valuable cross training.
2. *Complaints regarding poor custodial service.*
 - Lead Custodians have been encouraged to interface with building occupants and communicate the frequency of cleaning services provided.
 - Custodial cleaning frequencies have been posted on the FS website (<http://facilities.csusb.edu/departments/custodial.asp>). Not all area types are cleaned daily.
 - Windows – Custodians clean windows that can be reached from ground level, especially at building entry areas. All other building windows are cleaned as budget permits.
 - Recycling – Management is working to ensure custodians have the proper blue-bins in which to separately collect recyclable materials.
3. *Restroom cleanliness.*

- Custodians were reminded to re-check restrooms near the end of their shift for cleanliness and servicing.
 - Additionally, the afternoon/night custodial crew services all restrooms in buildings having late classes, such as JB, UH, and SB.
4. *Cleanliness for weekend events.*
- Increased effort has been made to look ahead at weekend activities (i.e., Athletic events) and provide appropriate custodial services.

Facilities Services (FS) – Environmental Health and Safety (EHS)

1. *Computerized Material Safety Data Sheets (MSDS) information.*
 - Currently funding is not available to procure an MSDS database. EHS has requested the issue be reviewed at the system-wide level.
 - MSDS information comes in a hard copy with materials.
2. *Hazard mitigation.*
 - EHS conducts routine safety inspections of areas known to possibly be hazardous.

Facilities Services (FS) – Ground Maintenance (GM)

1. *Improvement needed in grass covered areas and sprinkler systems.*
 - FS has contracted additional staff to troubleshoot/correct campus irrigation concerns.
 - For Housing, a grounds worker has been assigned the area to ensure high quality.
2. *Driving on the grass.*
 - Staff have been instructed not to drive on lawn areas.
3. *Improve cleaning of walkways.*
 - GM staff have been instructed to ensure all walkways are clean and free of debris.

Facilities Services (FS) – Heating and Air Conditioning (HAC)

1. *Hot/Cold complaints.*
 - Automatic controls are being installed in the modular buildings to allow more control from HAC's central plant.
 - Requests for heating/air conditioning for events are checked against the event list prior to activation for conservation purposes.
2. *Customer contact/follow-up.*
 - Notes (post-it style) are left for/with occupants.
 - Persons with hot/cold complaints are called back to verify the problems have been corrected.

Foundation – Bookstore

1. *Prices are too high.*
 - Bookstore has dramatically increased the number of used textbooks sold in past two years, enabling them to become one of the best stores in the CSU in terms of used textbook sales (used texts sell for 25% off new textbook prices).
 - Bookstore management will be visiting departments on campus to explain textbook pricing policy.
2. *Wrong books (or incorrect editions of books) were ordered or received for classes.*
 - Bookstore management is now sending out lists of books to be ordered for each department to departmental offices for review of specific details prior to orders being placed to ensure accuracy of orders. These lists are sent out twice to avoid errors.

Foundation – Business Office

1. *Hours to pick up checks and petty cash are too limited.*
 - Hours have been extended from 9:00 AM to 4:30 PM.
2. *Charges/assessments on funds held in trust accounts are too high.*

- The new Director of Finance will review the policy this spring.
3. *Would like to see forms on line.*
 - New website will be introduced soon with on-line forms.
 4. *Need more staff in Sponsored Programs Administration.*
 - Have added several new positions to handle volume.

Foundation – Dining Services

1. *Catering problems: Pricing inconsistent and high, deliveries late and product not as ordered, invoicing not as quoted, difficulties in confirming orders and clarifying schedules, communication snafus.*
 - A new Dining Service Director was hired in mid-November with extensive Catering experience. He is reviewing menus, and intends to evaluate pricing.
 - Catering is currently recruiting for a catering sales position. This position will be responsible for quoting prices, confirming orders, communicating routinely and effectively, and initiating timely follow-up calls to ensure event success.
2. *Prices are too high.*
 - Food Services has conducted price surveys of local competition this summer and is comparing prices to ensure competitiveness. Developing “combos” with reduced price for entrée, side, and drink.
3. *Concession lines too slow.*
 - Have recently installed new equipment to improve. Additionally, Food Services is testing changes to menu to increase throughput and will be testing register stations to reduce lines.

Human Resources

1. *Responses to customer requests for information take too long.*
 - Working to respond to customer requests for information in a timely manner.
2. *When someone is out of the office, have an alternate respond to inquiries.*
 - Implementing a system of alternates to provide information in someone’s absence.
3. *The recruitment cycle takes too long.*
 - Recruitment process has been streamlined.
 - A pool recruitment concept has been encouraged.
4. *Information provided to departments during the recruitment process could be enhanced.*
 - Maintain effective communication with departments during a recruitment effort.
 - Utilize feedback from recruitment and training surveys to increase customer satisfaction.

Parking Services

1. *On-campus signage.*
 - Requests may be submitted via e-mail (postingsigns@csusb.edu).
2. *Concern for removed trees in parking lots.*
 - A tree replacement program is in place.
3. *Parking Booth customer service.*
 - Marketing/Customer Service training has been enhanced to include training of student assistants.
4. *More rideshare parking spaces needed.*
 - a. Parking studies will include study of usage on rideshare parking spaces.
 - b. Two new lots (L and A Annex) were added during the last two years, parking stalls were painted on the intercampus road adjoining lots A and B, and a 1500-car parking structure is being planned.

Police

1. *Officers not visible.*
 - Increasing bicycle patrol and foot patrols.

- Provide crime prevention presentations (40 presentations during 2003 reaching a total audience of 1081 people).
2. *Response time for Escort Service slow.*
 - Added four-passenger carts and one CSO.
 - Conducting a response-time survey.
 3. *Speeding cars on campus and other violations.*
 - 660 warnings given in 2003. Additionally, estimate another 150 warnings were given that were not reported to the system.
 - 846 citations written in 2003.
 - Greater presence at trouble areas.

Support Services – Duplicating

Very few complaints were noted, therefore consistent patterns of complaints were not available and not addressable.

Support Services – Mail Services

1. *Inter-campus mail is too slow.*
 - Mail is picked up daily and properly addressed mail is delivered the next day.
 - Twice-daily mail runs are not an option with current staffing levels.
2. *Packages are delayed or lost.*
 - A TrackPad system that electronically tracks the package through the entire delivery process was purchased and implemented.

Support Services – Purchasing

1. *PeopleSoft issues.*
 - Have offered multiple training opportunities. As people are feeling more familiar with the system, we are receiving fewer requests for assistance.
2. *Procurement Card requirements slow down the purchase process.*
 - Procurement card activity is bound by very strict guidelines dictated by state law, Chancellor's Office and campus policy. The procurement card expedites the ordering of items, however there is paperwork required to verify what items were purchased and that they were received.

Support Services – Receiving

1. *Slow deliveries.*
 - Deliveries are made as quickly as possible with current staffing levels.