

CSUSB
Division of Administration and Finance
2004 Department Visits Review
November 3, 2004

Customer feedback is vital to the Administration and Finance 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 develop future goals that will better meet the changing environment and needs of the university.

During Spring 2004, division representatives met with campus departments to review the division's services and collect ratings and comments regarding those services. The overall average rating for the division was 4.08 (Satisfied) out of 5.00.¹ Average department ratings varied from 2.92 to 4.80, creating a response range of 1.88 and a standard deviation of .38. The following report summarizes positive comments as well as key concerns that were noted by customers during the 2004 campus department visits and resolutions by Administration and Finance departments.

Accounting – Accounts Payable (AP)

Positive: Departments found the monthly tips and quarterly workshops to be quite informative. Staff is recognized as helpful, courteous, and professional. Some Departments recognized improvements have been made in the travel area.

Issue: *Departments were frustrated with "cumbersome" travel procedures. They want to know why it takes so long to process travel claims and/or travel advances.*

Resolution: Due to the complexity of the travel issues, the problem is being approached from several different angles, which include: the formation of a Travel Focus Group; an ongoing Travel Committee; creative ways to improve communication; development of an automated travel system to improve the timeliness of travel form submission, tracking of document status, as well as improve accuracy of claims; and conducting customer feedback at the end of the year to gauge the success of implemented changes.

Accounting – Bursar

Positive: Service is friendly, customer service focus, and has increased in quality. The e-mailed notification of check availability to the departments was noted as an improvement.

Issue: *University Hall Bursar should be open the first Saturday of the quarter.*

Resolution: The University Hall Bursar hours mirror the offices surrounding them, whenever possible, and will consequently be open on the first Saturday of each quarter.

Issue: *Petty cash limit of \$50 is too low and reimbursement takes too long.*

Resolution: There is a \$50 limit on purchases per the State Administrative Manual (SAM 8100). Though the Bursar typically reimburses in three working days, per mandates, the office carries only a limited amount of cash on hand. For this reason, large reimbursements can take a longer time period and departments are encouraged to turn in petty cash reimbursement requests on a regular basis, in smaller amounts, which will reduce the wait time.

Accounting – Payroll

Positive: Payroll staff display a high level of customer service, answer questions quickly and get back to employees in a timely manner.

Issue: *Student checks are sometimes late.*

Resolution: The student assistant hiring process has recently been centralized in the Financial Aid Office. With one office entering student data into PeopleSoft, multiple data entry levels will be avoided - reducing the process time, and better enabling Payroll to pay the students in a timely manner.

¹ Satisfaction Rating: 5 = very satisfied; 4 = satisfied; 3 = neutral; 2 = dissatisfied; 1 = very dissatisfied

Budget

Positive: Many departments commented on the outstanding efforts of the Budget Office, pointing out how helpful, responsive, positive, prompt, and organized the staff is. Departments praised the budget book, office website, planning and communication, and training.

Issue: *PeopleSoft/CMS continues to be the area's chief issue. Comments were specifically made on training, reconciliation, and PeopleSoft not being user-friendly.*

Resolution: The Budget Office will obtain user feedback and target training for processes where users are having difficulty. Staff will also be directed to the CMS and Budget websites and encouraged to use of Step-by-Step Guides and training materials that are on-line. In addition, the Budget Office will advertise training topics and make recommendations on who should attend.

Issue: *Staff seek further explanation on the calculation of benefits (for budget reduction scenarios).*

Resolution: The Budget Office will provide more communication/explanation regarding data sources and the methodology that was used in benefit calculations.

Capital Planning, Design and Construction (CPDC)

Positive: Very helpful, knowledgeable, very responsive and wonderful to work with.

Issue: *Campus users would like to have increased communication and prompt responses. Campus requestors would also like to know project statuses.*

Resolution: CPDC staff will be responsible to maintain a close, professional relationship with end users and the campus community, updating them on project status and progress. CPDC will be implementing an office procedure to attempt to return phone calls, e-mails, messages, etc., within a 24-hour period. CPDC Project Managers will be responsible for educating users on project details and procedures to help alleviate confusion in project progress and to communicate status of projects including any unforeseen challenges.

Commuter Services

Positive: Commuter Services is a great program for those that use it. The Commuter Services office is excellent at keeping the campus informed of opportunities to rideshare.

Issue: *The Commuter Service office is not staffed consistently during normal University operating hours.*

Resolution: An additional Employee Transportation Coordinator (ETC) will be hired in Fall 2004 to ensure office coverage during normal operating hours.

Issue: *The policy changes and lack of communication is a deterrent to Rideshare participation.*

Resolution: In addition to the hiring of a new ETC, who will enhance communication for the program, the policy and procedures of the program are finalized and pending approval. A new "user friendly" website will also promote effective communication about the program.

Event Scheduling

Positive: Event Scheduling was noted as being very positive and helpful, particularly with off-campus groups. The office is reliable, very customer friendly and does a wonderful job.

Issue: *Many feel that chargebacks for events (facility use fees) are inappropriate, especially for student, academic, or other campus programs. Concern was noted for charges during the academic hours, or on Saturday when classes are in session for student and academic events.*

Resolution: The Building & Grounds Use Policy (<http://facilities.csusb.edu/Policies/BuildingGroundPolicy.asp>) provides procedures for facility use fees. The Facility Use Committee is charged with the authority to interpret and administer this policy and to develop and implement operational procedures related to buildings and grounds use and scheduling. Based on this committee's recommendation, events that meet mission related statement(s) of the university will not be assessed a facility use fee. Additional funds for manpower have been made available in order to facilitate groups meeting in the lower commons rooms between 6:00 p.m. and 10:00 p.m.

Issue: *It seems possible to reserve a room but not have heating or air conditioning.*

Resolution: A report is generated by Event Scheduling listing the reserved time and location of campus events and is distributed to Heating and Air Conditioning (HAC) for the scheduling of heat/air. For that reason, it is imperative that events be properly scheduled, with notations for HAC, through Event Scheduling to ensure the event is included on the report.

Facilities Services (FS) – Administrative Services

- Positive:** Keys are ready within 24 hours and many like the online key renewal system and find it helpful. Customers noted that they really appreciate the Enterprise rental car program—it is fantastic!
- Issue:** *Would like to see more clarification in key guidelines and identifying who can be assigned to certain keys. Would like to be able to send a staff person down to pick up keys for part-time faculty.*
- Resolution:** The campus Key Policy (<http://policies.csusb.edu/keypolicy.htm>) lists information regarding types of keys and related approval signatures, as well as guidelines for key issuance. Also, for the convenience of faculty members, department administrative support staff may pick up keys using an authorization card signed by the faculty member and department chair authorizing the issue.

Facilities Services (FS) – Automotive Maintenance

- Positive:** Service is awesome. Quality of work is good and at a good price. Staff is very helpful and responsive.
- Issue:** *Better communication to avoid some confusion.*
- Resolution:** Automotive staff will aim to communicate clearly, timely, and professionally with departments regarding any maintenance issues.
- Issue:** *Chargebacks, such as annual inspections, are too high.*
- Resolution:** In order to guarantee the maximum useful life of State-owned vehicles, specific maintenance services are required periodically (by the California Vehicle Code and State University Administration Manual). Facilities Services or an outside vendor (at the department's discretion) may complete this maintenance service. In either case, the maintenance service must be documented on the "Periodic Safety Inspection and Preventive Maintenance and Lubrication Service" form and filed with the Facilities Services Campus Vehicle Inspector. Facilities Services, for an annual fee, is available to perform the required service. Details about required maintenance services may be found at <http://facilities.csusb.edu/Departments/vehicleinspection.asp>.

Facilities Services (FS) – Building Maintenance (BMC)

- Positive:** Excellent response time for requests. The “building walk-throughs” are great, as well as the follow up, and provide a personal touch to the area's service.
- Issue:** *Chargebacks are not viewed in a positive way.*
- Resolution:** As directed by EO 847 (<http://www.calstate.edu/EO/EO-847.pdf>), the campus facilities department is responsible for providing maintenance as well as non-maintenance services and improvements. The campus general fund operations, or other appropriate funding sources, shall be reimbursed the actual direct costs plus indirect costs associated with requested non-maintenance services provided by the facilities department. Some examples of non-maintenance items include remodels, providing decorative treatment, attaching items to buildings and grounds, extending or modifying utility systems, and adapting or installing (other than Group I) equipment. Further information is available on the Facilities Services website (<http://facilities.csusb.edu/Policies/Chargeback.asp>).
- Issue:** *Exterior lighting concerns at night.*
- Resolution:** Regular inspections by Facilities Services' staff include checking serviceability of exterior lights, timers, and interior stairwells campuswide. All lighting concerns are immediately addressed.

Facilities Services (FS) – Custodial Services (CS)

- Positive:** Excellent people, very attentive and helpful. Custodians go the extra mile and respond quickly to spills, etc.
- Issue:** *Cleaning of off-key areas not performed daily.*
- Resolution:** The Custodial Manager has made an effort with each department head to schedule non-routine cleaning for off-key areas that may not be staffed daily.
- Issue:** *Dislike the rotation of custodial staff.*
- Resolution:** The custodial department makes every effort to keep custodians within the buildings they are assigned. Due to retirements, as well as long- and short-term absences, rotation of staff becomes a necessity in order to provide adequate cleaning services.

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

Positive: Very customer-oriented and provide personal response when needed. EHS was very helpful when looking into an air circulation problem in Academic Services.

Issue: *Delayed response to ergonomic evaluation request.*

Resolution: Unfortunately, a current lack of resources restricts EHS ergonomic evaluations to only employees who are manifesting symptoms of repetitive motion injury or who have seen a physician who has requested an evaluation. However, EHS provides quarterly ergonomic training and an educational packet of ergonomic principles to all employees who request information on ergonomics.

Issue: *Long response time.*

Resolution: Response times vary depending upon the issues involved. Concerns such as blocked exit doors, exposed wiring, fall hazards, or other imminent and serious safety issues are dealt with immediately, 24-hours a day; indoor air quality (IAQ) issues have a 15-minute maximum response time; other issues may require coordination with CPDC, the State Fire Marshall, or other agencies which may delay implementing solutions.

Facilities Services (FS) – Grounds Maintenance (GM)

Positive: The grounds are beautiful; whole campus looks nice in general--like a park. Grounds staff always go "above and beyond". On-going upkeep of campus is terrific.

Issue: *Outdoor Arena area trash cans full following Friday/Saturday night events.*

Resolution: The Grounds Manager is reviewing the events list to ensure adequate event support for trash cans, parking lots, etc. Cleanup from weekend events is performed early Monday morning.

Issue: *Water is being wasted because sprinklers are on too long.*

Resolution: Facilities Services has undertaken an aggressive effort to prioritize all irrigation anomalies (such as underground broken valves and wiring) and once corrected, adjusts watering times in the master irrigation computer.

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

Positive: Helpful, responsive, and committed to tracking down problems. Responsive to classroom needs.

Issue: *Building occupants unable to control temperatures in their specific areas.*

Resolution: Per Executive Order 785, the campus is required to set the heat temperature no higher than 68 degrees and the cooling temperature no lower than 78 degrees - either via the Energy Management System or locked thermostats. Additional information may be found on HAC's website (<http://facilities.csusb.edu/departments/hac.asp>).

Issue: *Temperature concerns from Social and Behavioral Sciences 4th floor building occupants.*

Resolution: HAC investigated, determined building design concerns, and is working to correct them.

Foundation – Bookstore

Positive: There were a large number of positive comments regarding customer service, good supply of books, and great communication.

Issue: *Numerous customers stated that the prices for textbooks were too expensive.*

Resolution: The Bookstore will be offering an informational campaign for faculty to provide a better understanding of textbook pricing and the process that facilitates the ordering of more used textbooks for students.

Foundation – Administration (Business Office)

Positive: There were a large number of positive comments regarding customer service, professionalism, and responsiveness.

Issue: *Several customers indicated that they are not receiving their monthly statements in a timely fashion.*

Resolution: The Business Office will meet with several departments to clarify the problem and improve processes as needed.

Foundation – Grants & Contracts (Sponsored Programs)

Positive: There were a large number of positive comments regarding customer service, professionalism, and responsiveness.

Issue: A few customers indicated that the procedures are confusing.

Resolution: Sponsored Programs is conducting follow-up visits with departments to clarify procedures and to determine appropriate process improvements.

Foundation – Dining Services (Food Services)

Positive: There were a number of positive comments regarding customer service, the broad selection of food that is offered, and catering services.

Issue: Many customers indicated the cost of food is too expensive.

Resolution: Dining Services is preparing an information campaign to compare their prices to other retailers.

Human Resources

Positive: Staff are responsive to questions and needs, as well as proactive and helpful with personnel issues. Training workshops are excellent.

Issue: Frustration with not being able to view certain personnel information in PeopleSoft. Also, need to train staff to answer questions in absence of managers. Some departments would like to see all applications, not just those that have been filtered by HR. Would like to see the recruitment/hiring process go faster.

Resolution: Managers will make personal team visits as a follow up to comments. A matrix of concerns and HR responses will be developed and implemented.

Parking Services

Positive: Parking Services has improved service over the years. They are very helpful with events and distribution of parking permits, and guest permits as well as very responsive to calls of service. Parking Services has improved a lot in understanding needs of campus departments. They are also helpful when planning events and offering options and customers always encounter an instant response for service at entry of campus.

Issue: Dispensers do not work on weekends and work intermittently throughout the day.

Resolution: Parking hired a new dispenser technician who will monitor dispensers throughout the week. Additionally, the department trained all parking officers on maintenance of dispensers, and they will monitor the machines on weekends and when the dispenser technician is not on duty.

Issue: Deans, faculty, and directors should have reserved parking spaces on campus.

Resolution: Parking will explore reserved parking stall interest and fee structure.

Support Services – Campus Stores

Positive: Many departments commented on the quick service and excellent responsiveness provided by Campus Stores. Delivery often occurs the same day as the order is placed.

Issue: The question was raised as to whether or not Campus Stores is still viable since Office Depot is being used for most office needs.

Resolution: Campus Stores is assessing inventory for the elimination of non-moving products. Office Depot carries many products and provides desktop delivery. Support Services is continuing to work toward reducing stock in Campus Stores to reduce the cost of maintaining inventory and to save space.

Support Services – Duplicating

Positive: There was tremendous praise for the high level of customer service, quick turnaround time, and reasonable pricing.

Issue: Several customers indicated that they would like to see Duplicating accept larger volume jobs.

Resolution: Duplicating recently bought a large envelope press and a large color press. Both items of equipment will enable Duplicating to handle larger volume jobs.

Support Services – Mail Services

Positive: Mail Services received much praise for the reliable and friendly service provided by the staff and the consistent service campus departments receive on a daily basis.

Issue: Some departments commented on problems in preparing bulk mailings, issues with certified mail, and issues with slow mail.

Resolution: Mail Services has begun meeting one-on-one with the departments that indicated various issues during their department visit. If training is needed, a class will be offered for specific users.

Support Services – Purchasing

Positive: Many departments praised the helpful and supportive staff. They are very happy with the procurement card and Office Depot programs.

Issue: Some departments talked about difficulties with the procurement card. Another department asked for an updated procurement card manual.

Resolution: A new procurement card manual was put in place October 2004 with updated procedures. Departments with specific issues will be visited one-on-one to address their concerns.

Support Services – Receiving

Positive: There were many compliments regarding quick turnaround on delivery; improved tracking of packages; and friendly, efficient staff.

Issue: A few departments indicated issues with deliveries – either the items were not delivered in a timely manner or to the wrong location.

Resolution: A new automated parcel tracking system has been installed and should resolve many of the delivery issues. The departments with specific complaints will be visited and we will determine the root of the problem.

University Police

Positive: Visibility of officers/chief, availability, response, and public relations has improved.

Issue: Lack of visibility/physical presence of police officers on campus.

Resolution: Working to place a satellite location of Police department in the center or front of campus. Continue to conduct foot and bike patrols.

Vice President's Office

Positive: Responsive, helpful, helps with audits, easy to communicate with, flexible, and great to work with.

Issue: Chargebacks are seen as unnecessary. Would like to see more innovation in the division.

Resolution: Better communicate the rationale and reasons for chargeback programs. Communicate program or process improvements that show innovation and creativity while abiding by applicable regulations.