

DIVISION OF FINANCE AND ADMINISTRATION

ANNUAL REPORT

Fiscal Year 2014-2015



Oregon State
UNIVERSITY



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STEWARDSHIP AND SERVICE TODAY AND TOMORROW

W. Glenn Ford

**Vice President for Finance & Administration
and Chief Financial Officer**



In the midst of significant shifts in the governance of Oregon’s public universities over the last two years, we reflect on what it means to be good stewards of an institution that has been in existence for 147 years, and will continue for generations to come. Oregon State’s leadership must make choices that benefit students and faculty today, while also taking a long view to position OSU for ongoing success as it strives toward its vision to become one of the top ten land-grant institutions in America.

To that end, the employees of the Division of Finance and Administration (DFA) have developed projects, streamlined administrative processes, and upgraded technologies over the 2014-15 fiscal year. Some of this work was driven by external forces, such as the dissolution of the Oregon University System after 86 years in existence, which required us to take on broader responsibilities and find new ways to collaborate with our sister public universities across the state. Other projects began as internal grassroots efforts, like the Lean Process Improvement Initiative, an ongoing program intended to help OSU function more effectively over time. As this report is being compiled, the DFA is developing its own strategic plan that will guide our future work in support of the goals of Oregon State’s Strategic Plan 3.0.

The DFA’s role in supporting the Strategic Plan is different in focus from academic units, and much of our work supports the essentials to the plan: stewardship of resources and using technology as a strategic asset. Some key accomplishments in 2014-15 include ending the year with a strong fund balance of 9.8%, an improvement over the 2013-14 fund balance of 8.4%. We worked with Moody’s Investors Service and secured OSU’s first-ever credit rating, a strong Aa3 rating with a stable outlook, and issued our own revenue bonds for the first time in history. We’ve also seen a great deal of success in the Oregon legislature, receiving \$65 million for Capital Repair and Renewal in the 2015-17 biennium for the seven public universities, compared to \$30 million in 2013-15. And we secured a \$25 million match for the Marine Studies Initiative facility in Newport, and a \$30 million match for the new OSU Forest Science Complex. These are exciting times for Oregon State!

The DFA works within a culture of service to the OSU community, reaching toward our vision of being the leader in creating innovative solutions for a 21st century land-grant university. Our mission is one of collaborative, responsible, and transparent stewardship of the resources entrusted to us. The people of the DFA have embraced the Strategic Plan 3.0’s call to “continually strive to push ourselves in new ways that challenge our thinking and past practices.” The Division of Finance and Administration team exists to serve the core mission of Oregon State. Our efforts resulted in a number of major accomplishments in service to Oregon State’s students, faculty, and staff, now and into the future.

W. Glenn Ford

SERVICE TO STUDENTS

RecycleMania 2015 Event Takes Civil War Trophy



OSU's Waste Watchers Club pictured with RecycleMania Civil War trophy

Campus Recycling celebrated its 10th consecutive year organizing RecycleMania, a national eight-week competition, as one of its learning and engagement opportunities for students. Campus Recycling partnered with the Student Sustainability Initiative and Waste Watchers, a student club, to plan and execute the 11 RecycleMania events during winter term. Students gained valuable experience in leadership, service, event planning, marketing and

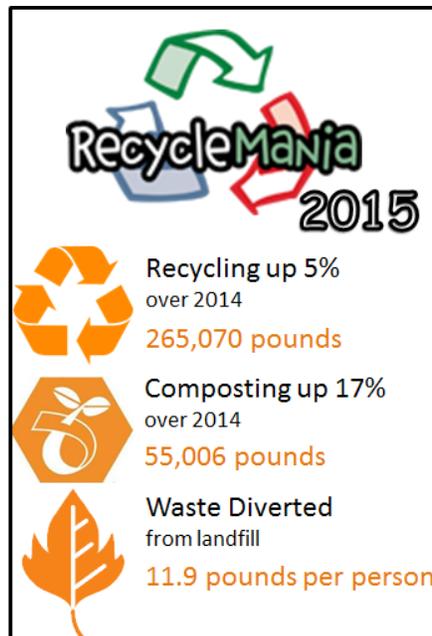
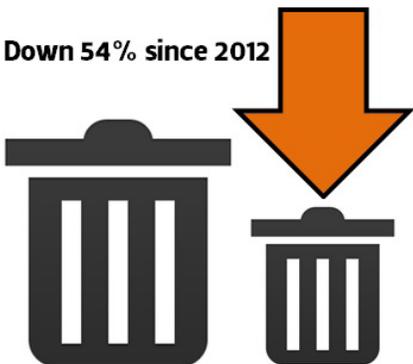
more. OSU was ranked in the top 50 Green Colleges by the Princeton Review in 2015.

Business Affairs-Procurement, Contracts and Materials Management

Strategic Plan Goal 3: Strengthen Impact and Reach Throughout Oregon and Beyond *Students' work enhances Oregon State's national leadership in sustainable use of resources.*

PER CAPITA TRASH DURING RECYCLEMANIA

Down 54% since 2012



Energy Center Steams Up Education

Oregon State's Energy Center, operated and maintained by Facilities Services, delivers heat, hot water and steam power to the Corvallis Campus. It also provides unique educational opportunities to students. Financed by a grant from the Student Sustainability Initiative, the School of Mechanical, Industrial & Manufacturing Engineering's (MIME) Energy Efficiency Center partnered with Facilities Services on a student project to identify opportunities to reduce energy costs on campus, primarily focused on OSU's Energy Center. The students' efforts garnered a second grant for 2015-16, and their recommendations for improvements are currently being reviewed. The Energy Center was also the focus of a MIME senior capstone project in the area of developing cost-effective design options that could be implemented to respond to component failures. Facilities Services conducted 25 tours of the Steam Plant for a total of 698 Engineering students in 2014-15.

Facilities Services

Strategic Plan Goal 1: Provide a Transformative Educational Experience for All Learners *OSU's Energy Center offers unique educational experiences and research opportunities.*



Student Financial Literacy Outreach Promotes Personal Success



Students Participating in Money Matters Fair

Oregon State's Financial Literacy Resource Council is a joint project of the Assistant Provost for Enrollment Management and the Vice President for Finance and Administration, with the goal of increasing students' knowledge of personal finances. As one outcome of this initiative, Business Affairs sponsored the Money Matters Student Financial Literacy program with help from a grant from the OSU Foundation Women's Giving Circle.

This year's program engaged over 1,000 students at 17 events that promoted financial awareness and literacy. Many college students have little experience managing their own finances and studies show that debt and financial stress are the number one reason students leave college. By promoting personal financial literacy, the Money Matters outreach programs work to increase student retention and improve individual financial success later in life. Highlights from the 2014-15 Money Matters program include:

- Hosted information sessions, in partnership with program staff of three residence halls, on topics such as budgeting, loans, smart spending, credit and credit cards, identity protection, and managing debt.
- Hosted information tables at West Dining and Dixon Recreation Center. A prize drawing encouraged students to engage with staff about money topics. Our student team staffed a similar table at the Beaver Bookstore's Grad Fair, where students could write down their money goals or post-graduation plans and take a photo with it.
- Started an Instagram promotion ([osumoneymatters](#)) that allows students to share their individual financial goals with other followers, and it offers tips and resources.
- Presented the Money Matters Fair in the MU Quad, which included interactive booths with money topic games, trivia, information, and prizes, including a chance to win a \$1,000 scholarship. University Housing & Dining and Dixon Recreation Center joined in to promote their financial programs, and a local non-profit brought dogs to play with while educating students about how to budget for pets. Over 200 students participated.

Business Affairs, Student Finance

Money Matters Student Ambassadors:

"I enjoyed reaching out to so many students, I felt like I really made a difference in their financial understanding." *Jacey Silk, Freshman*

"Planning and organizing an event like this was challenging but I felt like we really had an impact on the student body; I felt like I learned a lot too!"
Kallum Gagnier, Sophomore

"So many students were engaged in our activities, many even came multiple times! I feel it is important to share the knowledge that we were blessed to learn firsthand."
Kenzie Gibson, Freshman



Strategic Plan Goal 1: Provide a Transformative Educational Experience for All Learners *Financial literacy education sets a strong foundation for lifelong personal success.*

Students Train in Emergency Response, Become a Campus Emergency Resource



CERT Class photo courtesy of Beaver Digest

The Emergency Management Program worked together with Dixon Recreation's Adventure Leadership Institute (ALI) and the College of Public Health and Human Sciences to develop the curriculum for the new Community Emergency Response Training physical activity class. In 2014-15, over 40 students were trained in emergency response techniques, and participated in a four-hour simulated emergency exercise.

With the training, students become eligible to join OSU's Disaster and Incident Response Team, a volunteer group that can be deployed as needed, both at OSU and in the local community. Through this ongoing class, students gain critical emergency response skills that will be beneficial throughout their lives.

Risk Management- Environmental Health and Safety, Emergency Management Program

Strategic Plan Goal 3: Strengthen Impact and Reach Throughout Oregon and Beyond *Students learn life-long emergency response skills and enhance Oregon State's emergency preparedness.*

Emergency Response Planner:

"If an emergency event were to happen at OSU, I can request assistance from the ALI's Disaster and Incident Response Team. Knowing that the students have taken the emergency responder class, are skilled in using the equipment, and are familiar with campus, gives me a lot of confidence in how they will perform."

Mike Bamberger, OSU Emergency Preparedness Manager

Student Interns Gain Experience in the Risk Management Field

The Spencer Educational Foundation, affiliated with the Risk and Insurance Management Society, awarded Oregon State a \$4,000 grant to fund a student intern position in 2014-15. The student gained valuable professional experience while making critical insurance information more accessible to the OSU community. In addition to projects like streamlining internal processes and developing training resources, the intern created easy-to-use online registration systems for "over-the-side" insurance for ocean research equipment, international travel, and international shipping needs.

Risk Management

Strategic Plan Goal 1: Provide a Transformative Educational Experience for All Learners *Providing practical, hands-on experience for students in a professional setting.*

Pocket Park Incorporates Community Collaboration

In Spring 2015, Capital Planning and Development's Pocket Park project engaged the campus community in a collaborative design process that

included a series of public workshops, online surveys, and dialogue through social media tools. The resulting input, with special consideration given to accessibility, sustainability, and diversity of opinion, informed the Park's design. The Pocket Park is intended to beautify campus and fill the vacant space left after street improvements at the intersection of 15th Street and Washington Way. Construction will begin in Fall 2015.

Capital Planning and Development

Strategic Plan Goal 1: Provide a Transformative Educational Experience for All Learners *Engaging students in campus development projects provides unique learning experiences and helps prepare graduates for productive citizenship in a global society.*

Pocket Park Collaborators:

"What a great opportunity to engage, influence and collaborate with the OSU and Corvallis community. This gave us the opportunity to work together in leaving an impactful legacy for the campus and surrounding community. This project provides a great foundation for future campus collaborations."

Bill Callender, Associate Director Department of Recreational Sports

"I appreciated the holistic process because it allowed for me to engage with the designers and CPD, to fully understand the project in a way that led to more fully formed thoughts on what I saw as valuable directions. I greatly appreciated the opportunity to engage with the designers along the way, so that I got a transparent sense of what their thoughts were, and felt fully valued in giving any and all feedback."

Gabriel Merrell, Associate Director, Office of Equity and Inclusion

Capital Projects Improve Safety & Accessibility for Everyone

Several Capital Planning and Development (CPD) projects in 2014-15 focused on creating a built-environment at OSU that prioritizes safety and accessibility.

- Responding to an ASOSU Women's Affairs Task Force Report, CPD partnered with Facilities Services and ASOSU leadership to complete the Campus Way Lighting Project. Eighteen new historic-style light poles, utilizing energy- and cost-efficient lights, were installed along the north side of Campus Way between 30th and 35th Streets. Environmental impacts were minimized, with shields that deflect light away from sensitive plants, and through special installation methods that protected lawns, gardens and the ginkgo biloba trees in front of Wiegand Hall.
- CPD completed a number of improvements related to the Americans with Disabilities Act (ADA), including upgrades to bathrooms, building entry ramps and sidewalk improvements, toward the goal of

creating safer, more efficient spaces and fully accessible paths of travel between buildings.

- In Austin Hall, CPD utilized cutting-edge technology and design features to support universal accessibility and inclusivity. The newly-opened building was equipped with an audio induction loop system that transmits sound directly to hearing aids and cochlear implants, offering a more discreet and higher-quality listening experience. Building entry paths were gently sloped beyond ADA minimum standards to provide an elegant and seamless grade change, so that everyone can approach the building in the same manner. Seat walls and benches were built to allow both wheelchair and non-wheelchair users to sit together.

Capital Planning and Development

Strategic Plan Goal 1: Provide a Transformative Educational Experience for All Learners *Developing a built environment incorporating state-of-the-art technologies that enhance safety and accommodate all students and faculty.*



UHDS Upgrades WiFi in Response to Changing Demands

University Housing and Dining Services invested \$500,000 in operational funds to upgrade Wireless Fidelity (WiFi) networks across all residence halls and dining centers. To accommodate changing demographics, wireless access points (WAPs) were increased by over 155%, from 432 to over 1,100, and the existing WAPs were replaced with upgraded equipment. With students now bringing an average of five wireless-capable devices with them to campus, the WiFi upgrades provide increased availability, better reliability, and faster access. *University Housing and Dining Services*

Strategic Plan Essential: Technology as a Strategic Asset *Ensuring widespread and convenient access to information enhances student learning and improves student experiences.*



SERVICE TO THE OSU COMMUNITY

Successful Implementation of Zonal Parking System Eases Commutes

Oregon State's new parking system, effective in October 2014, makes it easier for people to find available parking in desired areas. Zonal parking balances utilization of core and remote lots, reducing traffic congestion in the campus core. Additional parking services were created, including more price options, an online sales portal for daily and monthly visitor parking permits, and convenient self-pay stations. Parking revenue is used to fund lot and garage maintenance, the Beaver Bus system, and additional bike lockers.

Transportation Services

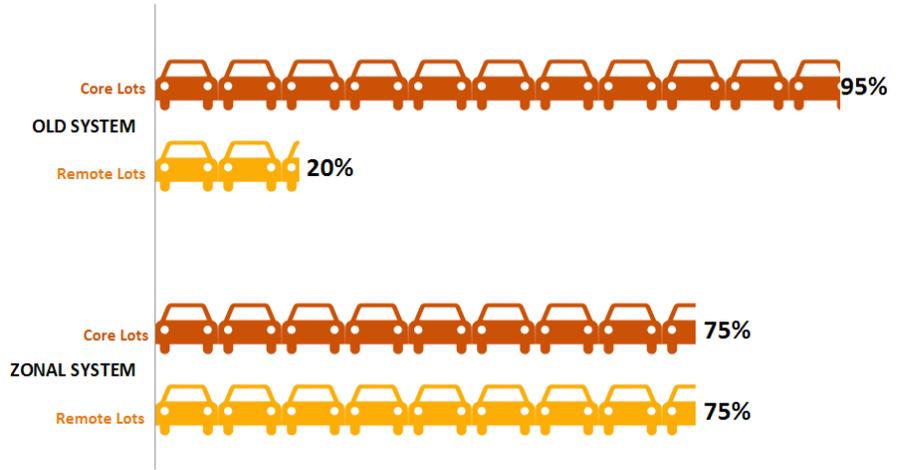
Strategic Plan Essential: Stewardship of Resources Innovative parking solutions make it easier to work, learn, and do business at Oregon State.

Parking Customer:

"I am a huge fan of the new parking program. I've also talked to many colleagues in the college, all who find the new system a much better alternative to what has been used in the past. It's nice to be able to reliably find a spot in the lots where I expect. The traffic related to 'parking hunting' has dramatically reduced. It is much easier, quicker to find a spot, and safer for pedestrians and bicyclists. In the past, I'd search 10-15 minutes for a parking spot. Congestion and commute time has substantially reduced. My appreciation to the parking group!"

Donald O. Neubaum, Ph.D., Associate Dean of Research, College of Business

Parking Lot Utilization
(average per day)

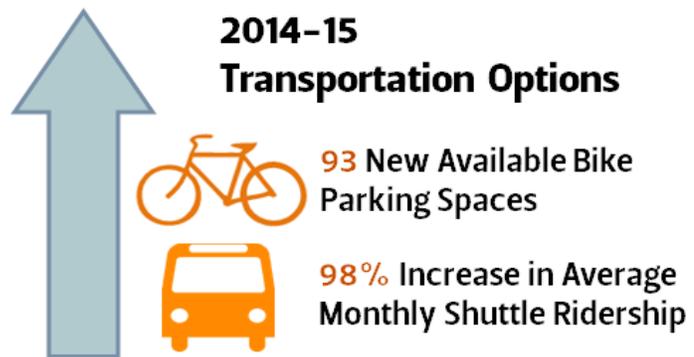


Boosting Sustainability Goals through Investments in Transportation Options

Together with the Sustainability Office, Transportation Services created the *Transportation Options* program to promote alternatives to driving to the Corvallis campus and beyond, such as carpools, bicycles and buses. This outreach and engagement initiative has boosted awareness of driving alternatives through more than 30 educational events for the OSU community. Routes and operation times of OSU's campus shuttle, the Beaver Bus, were expanded, and real-time shuttle tracking mobile apps and website are now available. Bike parking was improved at 36 locations across the Corvallis campus, including additional covered and uncovered spaces, and the replacement of many outdated wheel racks with upgraded staple/hoop racks.

Transportation Services, Sustainability Office

Strategic Plan Goal 2: Demonstrate Leadership in Research, Scholarship and Creativity while Enhancing Preeminence in the Three Signature Areas of Distinction Enhancing Oregon State's national leadership in the sustainable use of resources.



Providing Collaborative Business Support for Regional Class Research Vessel Project



RCRV drawing courtesy of CEOAS

The National Science Foundation (NSF) awarded Oregon State a grant of about \$300 million for a 10-year project to lead the design and construction of at least two new coastal research vessels, scheduled to go online in 2022. This is the largest sponsored project ever awarded to Oregon State.

Because of the size and complexity of this federally-sponsored project, it is a true community effort, with groups from Business Affairs; Procurement, Contracts & Materials Management (PCMM); and the Forestry, Oceanic and Atmospheric Business Center (FOBC) partnering closely with the Office of Sponsored Research and Award Administration, and the College of Earth, Ocean, and

Atmospheric Sciences. PCMM and FOBC staff are permanent members of the operation team, providing ongoing budgeting, expense management, and financial analysis. They also manage the specialized reporting required by the NSF, and ongoing contract management.

2014-15 milestones include a successful business systems review by the NSF, and the satisfaction of NSF goals for progress on the acquisition plan. *Business Affairs; Procurement, Contracts and Materials Management; Forestry, Oceanic and Atmospheric Business Center*

Strategic Plan Goal 3: Strengthen Impact and Reach Throughout Oregon and Beyond *Collaborating to build the next generation of the nation's ocean-going research vessels.*

New Risk Management Tools Aid Oceanic Investigators

Risk Management developed new tools to help principle investigators involved with oceanic research better predict insurance costs and understand requirements. Premiums for “over-the-side” insurance for ocean-going equipment traditionally vary quite dramatically and can be unpredictable, but Risk Management’s



Photo courtesy of Tristan Peery

new approach enables investigators to estimate premium costs in advance, facilitating grant budgeting. One new tool is a program booklet that investigators can use to calculate the premium of each deployment based on the type of equipment, its value, and the number of days at risk. It also guides users through the steps of creating a risk assessment/loss control plan, a critical requirement for insurance and grant awards.

Risk Management

Strategic Plan Goal 2: Demonstrate Leadership in Research, Scholarship and Creativity while Enhancing Preeminence in the Three Signature Areas of Distinction *Supporting research in the grant planning stage enhances project successes.*



Photo courtesy of CEOAS

Facilities Services: Efficient Stewardship in Action

Facilities Services is committed to protecting Oregon State’s investment in its infrastructure, architecture, and landscape, and to serving the needs of its constituents. It successfully provides efficient and responsible stewardship as it supports the work of research teams, enhances the student experience, minimizes collateral damage, and responds quickly to life safety issues.

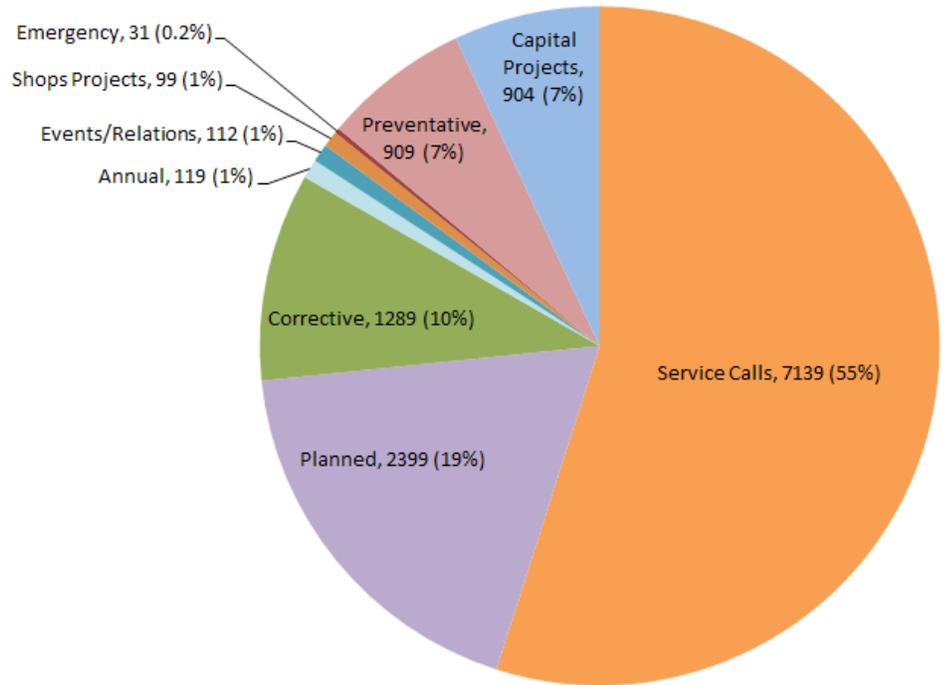
In 2014-15, Facilities Services addressed over 13,000 work order requests, 55% of which were service calls—urgent requests that are responded to immediately by a dedicated triage team. Corrective work orders, 10% of the overall requests, are those that were scheduled for a response within three to five days. OSU Facilities staff maintains approximately 115,000 square feet per full-time equivalent employee (FTE), whereas our Pac-12 peers have a 20,000-40,000 square feet per FTE service ratio. Clearly, Facilities Services is exceptionally efficient in responding to the needs of the Oregon State community.

Facilities Services

Strategic Plan Essential: Stewardship of Resources *Ensuring that physical infrastructure resources are used effectively, efficiently, transparently and in a socially responsible manner.*



13,001 Facilities Work Orders in 2014-15



Photos courtesy of Facilities Services



Facilities Services Customer:

“We recently made some configuration changes in our offices. We were really happy with the work [of Facilities Services]. They were efficient, friendly, professional, and responsive to our plans of what could and couldn’t be achieved. I love our new layout and believe it will work well for our needs. You have a good crew despite the tremendous amount you all are responsible for. Whenever I interact with facilities folks they are always cheerful and helpful.”

Cindy Kent, Department of Integrative Biology, Executive Assistant to Dr. Jane Lubchenco

Collaboration Supports Research and Preserves Campus Beauty



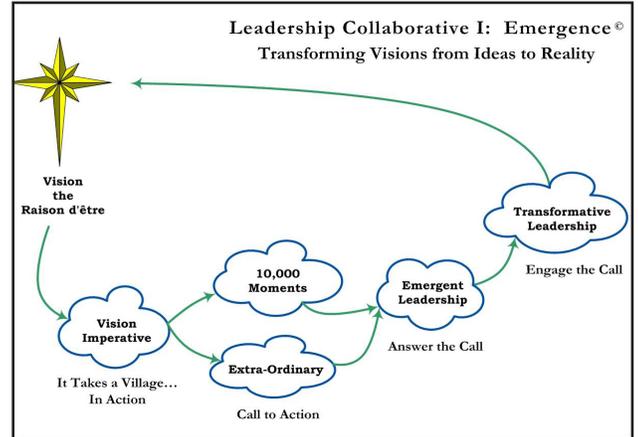
Photo courtesy of Facilities Services

Capital Planning and Development and Facilities Services partnered with the College of Pharmacy to install a new standby generator at the Pharmacy Building, protecting critical research by providing a permanent source of backup power. The site was selected to minimize impact on OSU's National Historic District, requiring Landscaping to modify an existing retaining wall and plant beds. The Electrical shop sized, designed, and installed the switch gear, wire, conduit and generator. *Facilities Services, Capital Planning and Development*

Strategic Plan Essential: Stewardship of Resources Collaborative problem-solving helps ensure research success while protecting the historical beauty of the campus core.

New Training Program Develops Emergent Leaders and Helps Make OSU's Vision a Reality

The Center for Learning and Organizational Development launched the *Leadership Development Project* in 2015 with the goal of developing emergent leaders at Oregon State. The program features intensive training models designed to facilitate leadership skill development, openness to new ideas, and positive organizational outcomes.



- A pilot class for the first training module, *Leadership Collaborative I: Emergence (LCI)*, was presented in Spring 2015 to 21 faculty, staff, managers and individual contributors from 18 departments. Participants learned foundational leadership principles and practices, and acquired skills designed to unleash the potential of all employees to transform OSU's Vision, Mission and Values from ideas into reality.
- The Leadership Development Project will offer *Leadership Collaborative I: Emergence* again in Fall 2015 and Winter 2016. The second module, *Leadership Collaborative II: Power through Partnerships*, will be piloted in Spring 2016. The *Managers as Leaders* module will be developed and piloted 2016-2017. *Office of Human Resources-Center for Learning and Organizational Development*

Strategic Plan Goal 3: Strengthen Impact and Reach Throughout Oregon and Beyond Developing the next generation of university leadership, driven by OSU's vision, mission and values, will ultimately increase Oregon State's influence.

Leadership Collaborative Participants:

"I am proud of what I've learned and am bringing it into my job on a daily basis. I, for the first time, feel like a part of the OSU team. The more I learned about the Vision, Mission and Values, the more I enjoyed being a part of it and bringing it into my work life, for I realized how it encompasses and affects every aspect of our jobs." *Aurora Terhune, Office Specialist, College of Liberal Arts*

"I think the LCI Mission is one of the only ways this institution will improve continually and as a place where we actually fulfill our own Vision. It's an approach from within and throughout, which is fantastic because it allows for different ways of doing the same thing, i.e., living the Vision. It allows for flexible and personalized solutions but with a common vision to drive it forward.

That, to me, is powerful." *Chrysanthemum Hayes, Academic Programs, Assessment & Accreditation*

Improved Campus Grounds Use Approval Process Simplifies Efforts for Many

The La Sells Stewart Center streamlined and automated the process for submitting and approving campus grounds use requests, reducing the opportunity for errors, and providing detailed event requirements to users. Personnel across campus now have more accurate and easily-accessible information about campus events, and requesters receive timely electronic confirmation and approval notices.

OSU Conference Services - La Sells Stewart Center

Strategic Plan Essential: Technology as a Strategic Asset *Leveraging technological resources and staff expertise to streamline an important administrative and safety process.*

Grounds Use System User:

“Safety is our number one priority, for our construction sites and especially for our Campus population. The change in the grounds use approval process has given us improved communication with Campus Events, allowing us to work with the event planners and coordinate around our construction projects. Not all of our work is as visible as Austin or Strand Halls, but deliveries and staging still occur. The more notice we have, the easier the coordination process.” *Rose DeBono, Manager, Capital Construction*

Oregon State: A Data-Driven Institution

The Cooperative Open Reporting Environment (CORE) began as a Provost-sponsored initiative in 2013 with the goals of providing university-wide tools for immediate access to data. The initiative eliminates multiple versions of data, and promotes high-level visibility, accuracy and cross-unit solutions. In 2014-15, CORE was made available University-wide, with more than 350 reports and dashboards providing information about enrollment, courses, finances and related metrics. Report options continue to expand.

The CORE program was developed using existing internal resources and staff through the creation of the Business Intelligence Center, a partnership between Information Services and Finance and Administration. As a result, the groups now work collaboratively on a number of projects. *Office of Budget and Fiscal Planning*

Strategic Plan Essential: Technology as a Strategic Asset *Enabling Oregon State leadership to be more effective by providing easily-accessible institutional data.*

Business Centers Offer Increasingly Efficient Service

Over the past five years, colleges and units across Oregon State have expanded staffing in response to higher student enrollments and greater programmatic needs, with headcount up by about 35%. In contrast, the Business Centers providing financial and human resources support to OSU departments have maintained more stable levels of staffing, up only about 8% since 2010. Business Center personnel are handling higher volumes of work more efficiently than ever before, through increased staff productivity combined with more streamlined administrative processes. During that same time period, Business Center customer satisfaction levels have increased across all survey categories.

OSU Shared Services-Business Centers

Strategic Plan Essential: Stewardship of Resources *Effectively managing Oregon State’s physical and human resources while maintaining a high level of customer service.*



Employees Newly Eligible for Full-Time Health Insurance Coverage under the Affordable Care Act



Stock photo courtesy of Highways Agency

The Affordable Care Act (ACA), federal legislation intended to increase the quality and affordability of health insurance, was signed into law by President Obama in March 2010. The Employer Mandate section of the ACA, effective January 1, 2015, requires certain employers, including OSU, to offer full-time health benefits to employees working an average of 30 hours per week or 130 hours per month.

Oregon State already provided medical insurance to employees at a more generous level than required by the ACA, but under the program a wider range of position categories are now eligible, including certain temporary employees and some undergraduate students.

In 2014-15, the Office of Human Resources reviewed 16,808 employee records, and of these, 4,343 were identified as newly eligible for full-time health benefit coverage under the ACA. Oregon State continues to review ACA eligibility upon an employee's hire, change of FTE, leave of absence, and end of employment.

The Office of Human Resources created an ACA website to assist the OSU community in understanding their new rights and responsibilities, including general information, references (e.g., laws and marketplace notices), OSU quick facts, and frequently asked questions. Six on-campus ACA trainings and one online webinar have also been presented.

Office of Human Resources

Strategic Plan Essential: Stewardship of Resources *Ensuring all employees receive proper level of benefits resulting from federal mandates.*

Strong Partnerships Advance Conference Planning

OSU Conference Management Services (CMS) has added new services that enable it to be a stronger partner to event hosts. When hosts engage CMS early in the planning process, it provides guidance in defining the event's goals and tools for success, and provides a financial roadmap, useful as organizers are securing funding. CMS provides full marketing and promotion services and handles all behind-the-scenes arrangements including coordinating logistics, accommodations, and special VIP considerations. One example of a successful client partnership is the 2015 Smart Goods Symposium, a highly-successful two-day conference that helped to enhance relations between academic institutions and industry partners, and laid a foundation for future collaborations.

University Conference Services- Conference Management Services

Strategic Plan Goal 3: Strengthen Impact and Reach Throughout Oregon and Beyond *Working with event hosts to meet strategic goals while raising OSU's visibility and reputation throughout the country.*



Enhanced Training and Resources Promote a Safe Research Environment



Photo courtesy of Environmental Health & Safety

Environmental Health and Safety (EH&S) promotes safe research practices through both online and in-person training and education, including a Training Needs assessment tool, videos, accessible training records, lab-hazard awareness, and biosafety training. EH&S also consults with faculty on research protocols in support of grant compliance. Significant events in 2014-15 include:

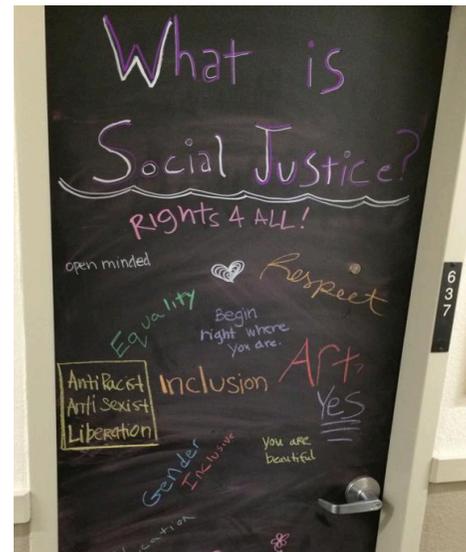
- Conducted health and safety procedure seminars for 5,104 research/teaching faculty and staff.

- Developed a laser safety manual in response to increased laser use on campus, along with an advisory group to ensure compliance with regulatory requirements.
- Administered 26,740 laboratory safety assessments, including hazardous waste pickups, fume hood certifications, and safety equipment checks, that assisted faculty with granting agency requirement compliance. *Risk Management-Environmental Health and Safety*

Strategic Plan Goal 2: Demonstrate Leadership in Research, Scholarship and Creativity while Enhancing Preeminence in the Three Signature Areas of Distinction
A strong foundation of laboratory safety augments research leadership and success.

New Living and Learning Community Facilitates Academic Diversity

University Housing and Dining Services invested over \$150,000 to renovate Wilson Hall as it launched the new Arts and Social Justice Living and Learning Community (LLC). In partnership with

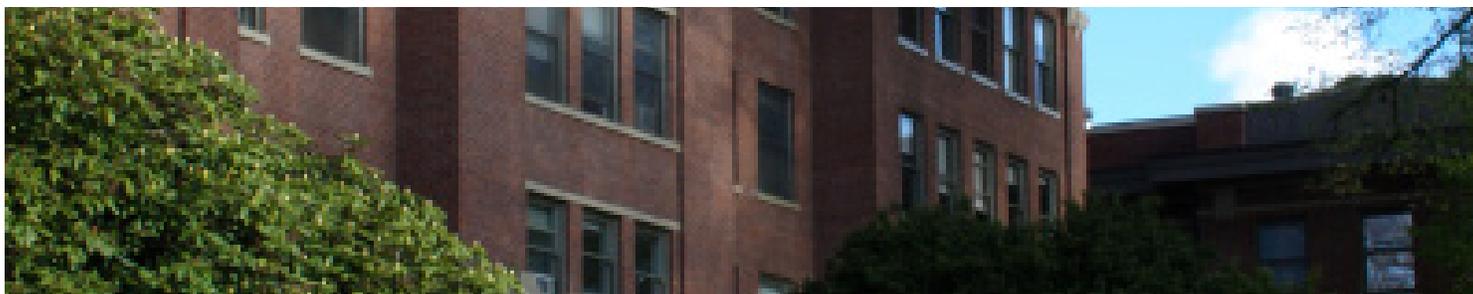


LLC Room Door Art photo courtesy of UHDS

the College of Liberal Arts, Ethnic Studies, Diversity & Cultural Engagement, Queer Studies, Women Gender & Sexuality Studies, and the School of Arts & Communications, the LLC brings together students of diverse academic and cultural backgrounds in a creative residential community that encourages open dialogue, artistic expressions of identity, and the highest scholastic achievement.

University Housing and Dining Services

Strategic Plan Essential: Enhancing Diversity
Facilitating diversity and inclusiveness in a living environment that prepares students to succeed in a globally connected world.



STEWARDSHIP

Increased Utilization of Minority, Women-Owned and Emerging Small Business (MWESB) Vendors



Stock photo courtesy of Citi Recruitment

Oversight of the MWESB program transferred from the Oregon University System to OSU in 2014. Oregon State's total MWESB expenditures for capital construction, goods, and services grew by over \$89 million, or 5.37%, in 2014-15, a notable increase in OSU's work with minority-owned businesses.

In December 2014, Oregon State sponsored the *Access-Opportunity-Connections Workshop*, providing resources and assistance to business owners regarding MWESB certification. The workshop included networking, marketing exposure, education, and other opportunities, and featured expert speakers from the Oregon Business Development Department, the Oregon Department of Transportation, Oregon Department of Administrative Services, and Oregon MWESB. *Business Affairs-Procurement, Contracts and Materials Management; Capital Planning and Development*

Strategic Plan Goal 3: Strengthen Impact and Reach Throughout Oregon and Beyond *Promoting economic growth of diverse businesses across Oregon.*

Upgraded Space Management Systems Improve Utilization of OSU Work Spaces

With the goal of more effective stewardship and accountability in managing the over 8 million square feet of OSU space across the state of Oregon, the Office of Real Estate and Space Management (RESM) made key improvements in 2014-15. Significant upgrades to the space management database enable streamlined reporting and aggregation of real-time space usage information. Space usage codes were completely realigned to conform to the Postsecondary Education Facilities Inventory and Classification Manual (FICM), the higher-education standard. RESM is on pace to complete a field verification (mapping and inventory) of all OSU space by 2017; to date 100% of space at the Newport Campus and 60% of Corvallis Campus space has been field-verified. *Capital Planning and Development-Real Estate and Space Management*

Strategic Plan Essentials: Stewardship of Resource and Technology as a Strategic Asset *Upgrading space management systems and processes for greater real-time accuracy, and more efficient use of campus spaces.*



New OSU Emergency Plan App Puts Critical Information at Your Fingertips



In 2014-15, Environmental Health and Safety (EH&S) began offering Oregon State's Emergency Response Plans through a convenient mobile electronic device application, bringing response methods and detailed information to the fingertips of users.

With easy, intuitive icons as a guide, the app assists community members in responding to various emergencies, including how best to protect themselves and summon help. Instructions are offered for a wide variety of incidents including fire, medical emergency, crime, earthquake, utility failure, inclement weather, transportation accidents, hazardous spills, and evacuations.

The app, free to users thanks to the support of EH&S and University Housing and Dining Services, includes UHDS residence hall emergency plans, and will soon incorporate the new Hatfield Marine Science Center and OSU Cascades Campus emergency plans. A link to download the emergency app can be found at Oregon State's Office of Emergency Management website. *Risk Management- Environmental Health and Safety*

Strategic Plan Essential: Technology as a Strategic Asset *Promoting campus safety by utilizing current technology to expand emergency resource communication.*

Investments in Professional Development for More Effective Customer Consultation



Stock photo courtesy of pixabay.com

OSU Shared Services, together with Academic Affairs, invested in the professional development of Business Center Human Resources staff, enhancing subject matter expertise and fostering a deeper understanding of business needs and strategies. The 12-week course, taught by an accredited instructor invited to the Corvallis campus, prepared 24 participants from Business Centers and the Office of Human Resources to obtain professional certification from the Society for Human Resources Management.

After learning skills in the areas of workforce planning, employee relations, compliance and more, 15 people to date have gone on to receive nationally-recognized human resources certifications. The result is a more highly-skilled human resources staff with an increased ability to refine processes and collaboratively problem-solve with customers in the Corvallis community. The class proved to be so popular that Oregon State's Professional and Continuing Education program has added it to its offerings. *OSU Shared Services-*

Business Centers, Office of Human Resources

Strategic Plan Goal 2: Demonstrate Leadership in Research, Scholarship and Creativity while Enhancing Preeminence in the Three Signature Areas of Distinction *Providing world-class business consultants supports effective leadership across the University.*

Printing and Mailing Services Celebrates 125 Years of Service to OSU



Photo courtesy of OSU Printing & Mailing

Printing and Mailing Services (P&M) is proud to have served the OSU community for 125 years. This year, P&M moved its main production facility (staff, equipment and inventory) out of the campus core and to the Research Way building, during which the department remained fully operational, processing 2.7 million pieces of campus mail and over 11 million print impressions in 2014-15. The move provided a number of benefits, including:

- Streamlined production workflows, resulting in faster turnaround times.
- Improved shipping counter organization for increased efficiencies

and shorter wait times, resulting in improved customer service.

- Larger document management room allowing for additional services, including CD-DVD duplication and academic test scoring.

At the same time, the P&M XPress Stop (conveniently located in the Memorial Union) was upgraded to become a one-stop service hub in the core of the Corvallis campus. Xpress Stop services include domestic and international mail and parcel shipping; sale of shipping supplies and stamps; copy, print, and fax services; passport photos; and more.

Printing and Mailing Services

Strategic Plan Essential: Stewardship of Resources *Providing efficient, high-quality services to the OSU community.*



Supporting Community Nutritional Needs with Broader Meal Options



Stock photo courtesy of picjumbo.com

Responding to a 2014 study finding that 59% of college students at one Oregon university were “food insecure,” University Housing and Dining Services created the Make Cents program, now available at dining halls across the Corvallis campus. The Make Cents menu offers highly nutritious, reasonably-priced meals in a variety of cuisines, priced affordably at \$3.50 in 2014-15.

University Housing and Dining

Strategic Plan Essential: Stewardship of Resources *Leveraging operational efficiencies to provide low-cost food options to better serve the needs of the OSU Community.*

Refined Planning Processes Enhance Service to OSU Community

Working with a number of other DFA units over the past year, Capital Planning and Development (CPD) rigorously evaluated processes and implemented changes to improve efficiency, internal and external communication, and engagement with the campus community.

- Established specific CPD liaisons who serve as primary points of contact for colleges, schools, and departments regarding space and capital facilities needs and concerns.
- Revised student employee management procedures to better align with hiring and performance evaluation criteria, and to emphasize student mentoring as part of the supervisor’s responsibility.
- Created a public website for Capital Projects Contracting Administration, taking over a responsibility previously handled by the Oregon University System and enabling outside vendors to view Requests for Proposal and Requests for Information listings for Oregon

State projects, while supporting the needs of Procurement and Contract Services.

- Created a new digitized bike parking tracking system, allowing planners to quickly access bike parking and utilization data for efficient responses to the biking needs of faculty, staff and students.
- Upgraded OSU Construction Standards, working in collaboration with Facilities Services, Environmental Health and Safety, Parking Services, and other Oregon State departments to formalize this 380+ page guidance document.
- Concluded the initial university-wide 10-year capital plan assessment, which will be used to develop key criteria for use in prioritizing capital investments in support of OSU’s Strategic Plan 3.0. *Capital Planning and Development*

Strategic Plan Essential: Stewardship of Resources and Technology as a Strategic Asset *Improving systems and upgrading technology to better respond to the capital planning needs of OSU.*



INDEPENDENCE

State-level Governance Changes Increase OSU's Responsibilities



The Oregon University System, along with the Oregon State Board of Higher Education, was dissolved by the Legislature after 86 years in existence. This change, together with the creation of OSU's independent Board of Trustees, required both transitional and ongoing attention by the DFA's financial units this year. A wide range of administrative policies, processes, and organizational functions were reassessed, and the DFA went through the process of setting up Oregon State as if it were a brand-new legal entity. These are some of the DFA's noteworthy accomplishments related to the changes in governance:

- Processes for quarterly financial reporting to the new OSU Board of Trustees were established. New investment and debt management policies were created by the DFA and approved by the Board of Trustees.
- Integrated strategic management planning functions were developed, incorporating all facets of the University, to assist the Board and OSU divisions with high-level financial visibility and long-term planning.
- Financial assets and related operations and processes were moved from the State Treasury to Oregon State, including endowment investments, the Public University Fund, and others.
- A new OSU Internal Bank was formed—a complex undertaking that required moving loans and other accounts, setting up accounting systems, and resolving related challenges in cooperation with the State Treasury and Oregon's other public universities.
- The University Shared Services Enterprise (USSE), which provides various financial services to the seven Oregon public universities, was established. As host of the USSE (an independent entity) at the Corvallis campus, Oregon State invested significant structural and personnel assistance to help the USSE become operational as quickly as possible. Vice presidents of finance and administration at each of the seven public universities act as an oversight committee for the USSE, with that group currently coordinated by OSU staff.
- Responsibility for managing OSU's public institutional financial reports and coordinating external financial audits was assumed.

- OSU's first-ever independent credit rating from an external rating agency was obtained. This was a major undertaking that required a substantial amount of both time and financial documentation. Oregon State received a credit rating of Aa3 with a stable outlook from Moody's Investors Service.
- The ability to issue bonded debt was granted by the Legislature. This required OSU to set up independent treasury management operations, which were previously handled by the Oregon University System (OUS).
- Responsibility for policy governance, previously provided by OUS, was conferred to OSU, including determining which policies carry the weight of law (Standards), and which are subject to management discretion (Policies). Business Affairs is synthesizing the former OUS Fiscal Policy Manual with OSU's existing fiscal policy manuals, and evaluating content for appropriateness in light of the new governance model.
- Responsibility for administering Oregon State's Minority, Women-Owned and Emerging Small Business program was assumed, in support of the success of diverse businesses across the state.
- An independent OSU website was created for Capital Projects Contracting Administration, fulfilling a state requirement previously handled by OUS.

LEANING FORWARD AT OSU

New Process Improvement Program Focuses on Efficiency and Service

The *Leaning Forward at OSU* Process Improvement Program arose from a grassroots effort in the DFA to improve the services provided to faculty, staff and students. Based on a dual foundation of process improvement and respect for people, the Lean initiative brings together stakeholders from across multiple units to review, map and refine a current shared process.

“Lean Team” members work collaboratively to build a streamlined process with value-added solutions for customers, as well as greater efficiency and effectiveness for the University. In 2015, eleven current employees were specially trained as Lean Facilitators, increasing our capacity to advance new Lean projects. Eleven Lean projects are currently underway, incorporating input and participation from people across Oregon State.

Strategic Plan Goal 2: Demonstrate Leadership in Research, Scholarship and Creativity while Enhancing Preeminence in the Three Signature Areas of Distinction *Creatively implementing efficient administrative processes enhances service and productivity, and supports leadership efforts in all areas of the University.*



2014-15 Lean Process Improvement Projects

Grant Processes & Services Lean Project:

“I was initially skeptical that the Grant Processes and Services Lean Project would be able to achieve a meaningful outcome since there were so many diverse groups involved. However, the Team members were fully committed to an inclusive and thorough process which led to a positive outcome. I loved seeing the wide-ranging discussions, how they were able to find common themes and develop consensus on a way forward. The Lean Team process worked REALLY well and I’m excited about the proposed changes. What this Team has accomplished will help make OSU a model for grants development and administration.”

Anne Nolin, Professor, College of Earth, Ocean, and Atmospheric Sciences

- New Employee Onboarding
- Grant Processes & Services
- Initiating Recruitments
- Business Center HR Process Change
- Employee Records Terminations
- Payroll Processing
- Policy Development & Review
- Postdoctoral Scholar Appointments
- Summer Appointments for 9-month Employees
- Systems Access
- Vendor Auto-pay

New Employee Onboarding Lean Project:

“The NEO project was a great example of campus collaboration. This was not just a Human Resources project but one that brought all stakeholders together to create a seamless, comprehensive onboarding program that combined essential information about being part of the Beaver Nation with the opportunity to meet new employees from across campus. The project focused on making sure the information provided would give all new employees the tools needed to be able to contribute at a high level early on in their career at OSU.”

Dave Blake, Assistant Vice President, Human Resources

AWARDS & RECOGNITIONS

National Recognitions

OSU Models Higher-Education Best Practices for Business Intelligence



Formation of a Central BI Team

Six Staff from Finance and IT Hand-Picked by CIO to Create One Central BI Group

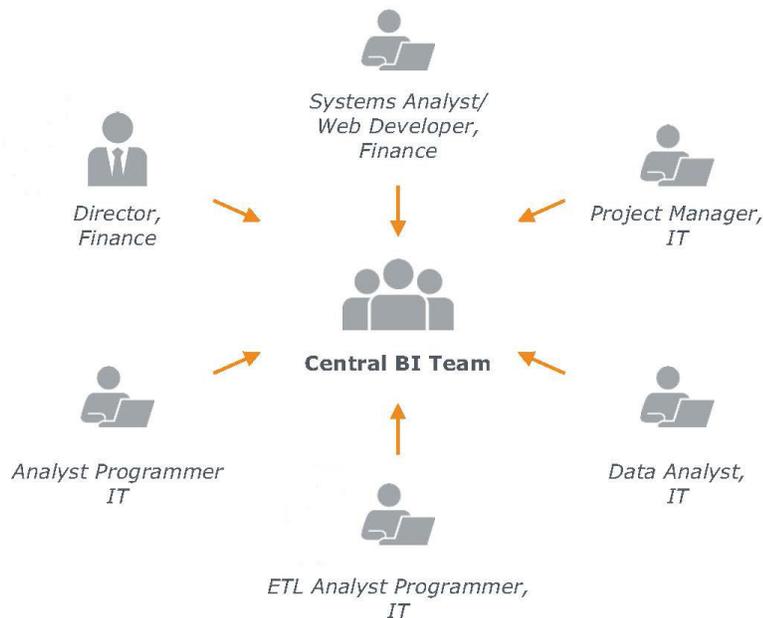


Diagram courtesy of EAB

In a recent research publication, *A Common Currency: Achieving Excellence in Data Governance and Adoption of Analytics*, the Education Advisory Board showcased Oregon State for best practices or “Hallmarks” in 5 of 20 categories. The best practices were implemented through Oregon State’s Cooperative Open Reporting Environment (CORE) initiative:

Hallmark 1: *Institutional Ownership of Data*—OSU’s incorporation of data as an Institutional Asset into the University’s Strategic Plan

Hallmark 4: *Pop-Up Data Dictionaries*—OSU’s Pop-Up Metadata

Hallmark 12: *HRIS Access Rights Coding*—OSU’s Complete Coverage System

Hallmark 17: *Crowdsourced Innovation*—OSU’s Embedded Suggestion Boxes

Hallmark 19: *Centralized Business Intelligence Group*—OSU’s Formation of a Central Business Intelligence Team

Office of Budget and Fiscal Planning

CORE Initiative Wins NACUBO 2015 Innovation Award

The Cooperative Open Reporting Environment (CORE) initiative (see *Service to the OSU Community* section) received the Innovation Award from the National Association of College and University Business Officers. Honoring outstanding institutional innovation and achievement, the award recognizes excellence in two areas:

- Process Improvement—Higher education institutions that have successfully re-engineered or designed a program that improves service delivery or administrative activity in response to a campus need.
- Resource Enhancement — Higher education institutions that have successfully reduced costs, increased revenues, or improved productivity in response to a campus need.

Office of Budget and Fiscal Planning



2015 NACUBO Innovation Award

Printing and Mailing Wins Two Awards, Totaling Seven National Recognitions in Three Years

Printing and Mailing Services continues its reign as a national award winner with two honors this year from an international professional organization for printers. The In-Plant Printing and



Printing & Mailing Staff with In-Print Awards

Mailing Association's 2015 In-Print Awards recognized Oregon State with a Bronze Award in the category of Clear Dry Ink Booklet (a newer printing technology allowing a variety of visual enhancements), and Bronze Award in the category of Two Spirit Full Color Poster (a type of printing process). OSU's Printing and Mailing team have won a total of seven industry awards in the last three years.

Printing and Mailing

Tamara Gash Awarded the NAEP Distinguished Service Award

Tamara Gash, Strategic Procurement Manager, was awarded the National Association of Educational Procurement (NAEP) Distinguished Service Award, recognizing individuals who have provided extraordinary service to their universities. In 2014-15, Ms. Gash renegotiated a large contract, saving OSU \$626,000, and resolved a dispute with a major system-wide contractor that resulted in the mitigation of \$1.5 million in potential overcharges to Oregon State. NAEP recognized her as a superior procurement professional and a valued member of her field.

Business Affairs-Procurement, Contracts and Materials Management



Tamara Gash

New DFA Award Recognizes Lean Process Improvement Team

The New Employee Onboarding Lean Team worked with stakeholders across OSU to develop and implement a cohesive, University-wide employee orientation program.



Leaning Forward Team Award Winners (back row): Tammy Hubert, Luke McIlvenny, David Barnes, Donna Chastain, Tracy O'Brien; (front row): Kim Cholewinski, Cindy Meyers, Lori Wolcott; (not pictured): Joey Carson, Jennifer Creighton, Mike Dooley, Kay Miller, Jenna Reeves, and Christina Schaaf.

2015 DFA Employee Awards

F&A All-Star Award

Ika Fifita

Parking Services

Community Building Award

Dwight Brimley

Agricultural Sciences & Marine Sciences Business Center

Customer Service Award

April Cummings

Agricultural Sciences & Marine Sciences Business Center

Innovation Award

Tammy Hubert

Auxiliaries & Activities Business Center

Leadership/Mentor Award

JoAnne Scheler

Agricultural Sciences & Marine Sciences Business Center

Teamwork Award

Curtis Flynn

Agricultural Sciences & Marine Sciences Business Center

Karen Bose

Agricultural Sciences & Marine Sciences Business Center

Outstanding Student Award

Trey Davenport

Agricultural Sciences & Marine Sciences Business Center

Leaning Forward Individual Award

Lori Wolcott

Auxiliaries & Activities Business Center

Leaning Forward Team Award

New Employee Onboarding Lean Team

Multiple Business Centers, Office of Human Resources, Environmental Health & Safety

DIVISION OF FINANCE & ADMINISTRATION

Leadership Council

Vice President for
Finance & Administration,
Chief Financial Officer

Glenn Ford

Director of Conference Services,
Transportation Services,
Printing & Mailing

Kavinda Arthenayake

Assistant Vice President for
Human Resources, Facilities
Services, Risk Management &
Public Safety

David Blake

Director of
Budget & Fiscal Planning

Sherm Bloomer

Associate Vice President for
Finance & Administration,
Director of Business Affairs

Michael Green

Executive Director of University
Housing and Dining Services

Dan Larson

Director of
Administrative Services

Jan Lewis

Executive Director of Capital
Planning & Development,
University Architect

Kirk Pawlowski

Director of OSU Shared Services-
Business Centers

Linda Powell

Director of Capital Budgeting
and Self-Support Budget &
Resource Planning

Nicole Real

Executive Assistant for
Strategic Communications

Melanie Rose

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