Mission, Vision, Goals & Strategies

One Mission, One Vision, One Voice

- Administrative Affairs Information Systems (AAIS)
- Facilities Planning & Management (FP&M)
- Finance & Administrative Services (F&AS)
- Human Resource Services (HRS)
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Administrative Affairs Division

Letter from VP for Administrative Affairs and Chief Financial Officer

The strategic planning process for the Administrative Affairs Division is dynamic and ongoing. Our plan is rooted in over 15 years of organizational assessment and continuous improvement efforts, aimed at supporting our campus mission.

We currently pursue division planning and change management efforts through a team approach with our Partnership for Improvement (PFI) Team. This team of staff and management employees, from throughout the division, engage in the annual review of our mission, vision, and goals. We conduct surveys and assessments regarding employee climate (division) and customer satisfaction for our services and programs, and develop annual improvement initiatives for each division area. The PFI team conducted/facilitated this review and update of the Administrative Affairs Division strategic plan.

One of our division’s programs of distinction, the Learning Labs Internship Program, reflects our commitment to form strategic partnerships and alignments in support of student learning. Through this program, we provide numerous opportunities for Cal Poly Pomona students to, in a “Learn by Doing” environment, experience meaningful work in a professional setting while earning academic credit. Our employees are committed to our division’s primary purpose to enhance and support a successful learning environment, essential to the excellence of our university, the quality/delivery of education, and the loyalty of our employees and alumni.

The division mission, vision, values and goals provide the framework and guidance for the planning documents prepared by each department that establishes specific goals, timelines for completion, and measurements. Outcomes are reported each year and new initiatives are developed. The following pages represent a “living strategic planning document” used as the basis for our direction, decisions, and objectives and represents the one mission, one vision, and one voice for the Administrative Affairs Division.

Edwin A. Barnes III, Ph.D.
Vice President for Administrative Affairs and
Chief Financial Officer
California State Polytechnic University, Pomona

Friday, May 15, 2009
Strategic Plan

Administrative Affairs Division

Overview

The Administrative Affairs Division is structured into four areas reporting to the vice president, as follows:

Finance and Administrative Services (F&AS)  
Darwin Labordo, Associate Vice President  
and Associate Chief Financial Officer

Facilities Planning and Management (FP&M)  
Walter M. Marquez, Administrator-in-Charge

Programs/Services:  
- Budget Services  
- Student Accounting & Cashiering Services (cash receipts, collections, disbursements, parking decals)  
- Accounting Services (general accounting, GAAP accounting, accounts receivable, accounts payable, travel)  
- Procurement (contracts, purchasing, property/asset management)  
- Graphics (print, quick print, Bronco Copy & Mail)  
- Distribution Services (mail)

Programs/Services:  
- Custodial Services  
- Landscape Services  
- Maintenance & Building Services  
- Motorpool  
- Energy & Utility Services  
- Planning/Master Plan  
- Design & Construction  
- Environmental Health & Safety

Human Resource Services (HRS)  
Sharon L. Reiter, Associate Vice President

Programs/Services:  
- Employment Services  
- Employee Relations  
- Workers’ Compensation  
- Risk Programs  
- Diversity & Compliance  
- Organizational Development & Training  
- Payroll Services  
- Benefits

Administrative Affairs Information Systems (AAIS)  
Glendy Yeh, Executive Director

Programs/Services:  
- Division Server/Desktop Support  
- Specialized Support for Administrative Systems (PeopleSoft HR/SA, PeopleSoft Financials, TMA, and Singularity)

Administrative Affairs has a long-standing history of assessment, continuous improvement, and planning. The division employs a team effort for planning continuous quality improvement efforts throughout the entire division, utilizing a variety of methods and processes.
**Vision**

Our vision is to be recognized by the campus community as a valued resource and strategic partner. We strive for excellence in providing reliable, accurate, secure, accessible, and innovative services while being honest, fair, transparent and responsive.

**Mission**

Our mission is to provide quality fiscal, human, and facility services in support of the university community through partnerships and innovative solutions.

**Core Values**

- **Integrity**
  We conduct ourselves in a fair, ethical and honest manner. We strive to make all decisions in the best interests of the university. We are accountable and answerable for our actions.

- **Quality**
  We provide timely, professional, courteous, quality service while continually assessing and seeking ways to improve our operations and services.

- **Professionalism**
  We are courteous, conscientious, and respectful in our dealings with others. We take pride in our work and value the high level of knowledge, dedication, and commitment our employees bring to the job. We support our employees’ continued professional growth.

- **Stewardship**
  We recognize our role as stewards of the university’s assets in managing resources responsibly, effectively, and efficiently. We are dedicated to maintaining and providing a sustainable working and learning environment.

- **Collaboration**
  We promote a collaborative, consultative, and innovative environment with our peers and customers that includes listening and learning. Together, we find innovative ways to make it work and celebrate our successes.

- **Diversity**
  We are committed to providing an inclusive and welcoming environment where students, faculty, and staff can succeed and thrive.
**Division Strategic Plan Process**

The Division of Administrative Affairs employs a participatory approach to planning and change, supporting Cal Poly Pomona’s vision, mission, and core values.

Our division has, for over 15 years, been engaged in an on-going assessment, continuous improvement, prioritization, and planning process, grounded in support of the university and division missions. Assessment and continual improvement is part of the Administrative Affairs culture.

It began with a 1994 organizational assessment followed by an in-depth Work Analysis process in 1996. This Work Analysis was a practical approach to determine the priority work each department must be doing in order to support the university and division mission in an environment of diminishing resources. The priority work was referred to as the ‘right work’ for each unit.

Over the next nine years, Administrative Affairs continued to implement changes, assess its effectiveness, and make adjustments to its services, products and/or programs. Division leadership continued to assess ‘right work’ focus as well as progress on actions for improvement.

In order to strengthen and support our division’s emphasis and focus on strategic planning and quality improvement, the Partnership for Improvement (PFI) Team was established in 2005. Through this team, consisting of representatives from each division area, our division employs strategic planning and continuous improvement efforts.

These efforts include an annual review and update of our vision, mission, and strategic planning goals. We conduct an annual division employee climate survey, numerous assessment survey tools, and develop annual service/quality improvement initiatives for each area in the division.

We again utilized our Partnership for Improvement team approach to update our plan.
Administrative Affairs Strategic Plan

Division Goals

GOAL

1. Quality Service

We are committed to providing quality services which are responsive to the needs of the university community.

Strategic Directions:

1. Continue our quality improvement efforts through our Partnership for Improvement team
2. Partner strategically with the campus community in support of the university’s mission
3. Leverage technology to improve processes, programs, and services
4. Provide open communications and shared information, promoting transparency

Indicators of Progress:

1. Annual reporting of our quality improvement efforts based on information gathered through the following:
   - Division Employee Climate Survey
   - Measures and benchmarking activities
   - Customer Satisfaction Surveys
2. Number of strategic partnerships participated in across divisions and with other campus constituents
3. Increased self-service access to support services under the purview of Administrative Affairs
4. Open communication and transparency measured through customer satisfaction surveys
GOAL

2. Fiscal Responsibility

We are committed to maintaining the university’s fiscal integrity and to safeguarding the assets of the university.

**Strategic Directions:**
1. Assure financial integrity and promote accountability
2. Ensure compliance with all applicable requirements
3. Provide timely, responsive, and accurate financial information

**Indicators of Progress:**
1. No significant audit adjustments or findings
2. Year-end close completed timely and accurately
3. Ongoing responsiveness to fiscal needs and interactions with the campus community
3. Physical Environment

We are committed to providing and maintaining a physical environment which complements effective learning and working.

**Strategic Directions:**
1. Seek to satisfy the space needs of our growing student population
2. Provide a healthy, attractive, and safe environment for our students, faculty, and staff
3. Ensure adequate levels of comfort and functionality throughout campus facilities

**Indicators of Progress:**
1. Annual funding received to improve existing and construct new facilities
2. Reduced number of state regulatory agency findings and citations
3. Reduced number of incident/accident reports
4. Human Resources

We are committed to serve the human resource needs of the university community, recognizing the uniqueness of each employee and program while ensuring that they remain part of the larger integrated whole.

Strategic Directions:
1. Attract, develop, and retain a qualified, diverse workforce
2. Leverage the use of state-of-the-art technology to communicate and administer HRS programs
3. Enhance employee performance and confidence through professional development programs

Indicators of Progress:
1. Recruitment and retention of a diverse faculty and staff is measured through the review of recruitment pools, hiring outcomes, and assessment/reports generated annually
2. Training needs are accessed and measured through workshop evaluations and surveys
3. Ongoing implementation of PeopleSoft/Oracle self-service programs
Administrative Affairs Strategic Plan

Division Goals

**GOAL**

5. **Environmental Sustainability**
We will incorporate environmental, economic and social sustainability throughout our divisional efforts, and exemplify this principle in the development and ongoing operations of the campus.

**Strategic Directions:**
1. Continue to support and encourage Climate Committee projects and programs
2. Identify ongoing resources to promote sustainable measures
3. Improve the efficiency of our existing assets
4. Reduction of energy consumption through renovation and behavior modifications

**Indicators of Progress:**
1. Bi-annual greenhouse gas emission report
2. Annual report of purchases of recyclable products
3. Increase in the amount of diverted waste
4. Savings as of the result in the summer 4/10 schedule
5. Improved efficiency in all building systems
**Administrative Affairs Information Systems (AAIS)**

**Overview**
Administrative Affairs Information Systems (AAIS) is a customer-oriented service organization that provides technical support on all aspects of information services including, but not limited to, desktop computers, servers, file shares, network connections, and core administrative systems such as PeopleSoft Finance, HCM (Human Capital Management) and TMA (The Maintenance Authority) for the Administrative Affairs Division.

AAIS promotes partnerships with all departments in the division and other units in the university or in the CSU system to seek optimal solutions in the rapidly changing technological environment.

**Vision**
To strive for excellence in providing reliable, accurate, secure, and easily accessible information services in support of the Administrative Affairs Division and the university community.

**Mission**
To provide quality services in computerized information systems and desktop support to the Division of Administrative Affairs and access to Oracle/PeopleSoft Financials and Human Capital Management systems to the university community.

**Core Values**
- We value collaboration and innovation
- We strive for data integrity and security
- We take pride in our work
- We continually seek ways to improve operations and services
- We celebrate success

**Strategic Planning Goals**
- To constantly strive toward enhancing Administrative Affairs Division’s information infrastructure, including its network, desktop systems and core administrative applications
- To provide customers with responsive, timely and user-friendly services
- To ensure and maintain data integrity and information security
- To establish partnerships with the campus community with respect to information technology
**Description:** Implementation of CSU Temp Faculty Employment Processing. This will provide an automated process to hire or update Job Data for temp faculty employees using the CSU Temp Faculty Batch Process.

<table>
<thead>
<tr>
<th>Outcomes/Improvements</th>
<th>Measurement(s)</th>
<th>Person(s) Responsible</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Reduce manual effort significantly</td>
<td>- Review Temp Faculty Employment in system</td>
<td>- Executive Director</td>
<td>Estimated December 2009</td>
</tr>
<tr>
<td>- Improve accuracy of data</td>
<td>- Use automated processes to approve and process Temp Faculty employment</td>
<td>- HRIS</td>
<td></td>
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<tr>
<td>- Improve administrative productivity/service</td>
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<td>- Payroll</td>
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<td></td>
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<td>- Faculty Affairs</td>
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</table>
Description: e-Recruitment will enable the campus to advertise employment opportunities and build relationships with internal and external candidates using an efficient, paperless online recruiting solution. This will improve services to employees and external candidates in searching for employment, applying for positions and tracking their progress through the recruitment process.

<table>
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<tbody>
<tr>
<td>Provide online services</td>
<td>Able to post job openings online</td>
<td>Executive Director</td>
<td>Estimated March 2010</td>
</tr>
<tr>
<td>Enhance efficiency by enabling applicants and employees to search and apply for open positions and collaborate with recruiter in real time.</td>
<td>Enable applicants to create, review and update resumes online</td>
<td>HRIS</td>
<td></td>
</tr>
<tr>
<td>Reduce manual effort significantly</td>
<td>Keep candidates informed of their applicant status</td>
<td>Human Resources</td>
<td></td>
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<tr>
<td></td>
<td>Collect and track recruiting results online</td>
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</table>
Administrative Affairs Information Systems (AAIS)

**Description:** Implement the new CSU reporting tables and the Oracle Business Intelligence Enterprise Edition (OBIEE) reporting tool (in collaboration with I&IT). This will improve/replace existing university-wide financial information reporting via the Finance Web Tools by first quarter of FY 2009/10.

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<tbody>
<tr>
<td>Improve campus financial information reporting</td>
<td>Reduced workload for Budget Services and University Accounting Services</td>
<td>I&amp;IT Applications</td>
<td>Estimated go-live in first quarter FY 2009/10</td>
</tr>
<tr>
<td>Provide flexibility in financial information reporting</td>
<td>Improved Customer Satisfaction</td>
<td>Finance Information Systems Manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Budget Director</td>
<td></td>
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<td></td>
<td></td>
<td>Accounting Director</td>
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</table>
**Description:** Implement PGP secure encryption application to protect confidential data/file (Class I) against unauthorized access.

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<th>Timeline</th>
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</thead>
<tbody>
<tr>
<td>Secure documents containing Class I confidential information</td>
<td>Successful implementation of the application</td>
<td>Executive Director, AAIS Tech</td>
<td>Estimated June 2010</td>
</tr>
</tbody>
</table>
Strategic Plan
Facilities Planning & Management (FP&M)

Overview
Facilities Planning and Management serves as the lead organization for planning, developing and maintaining the campus' natural and built environments in support of the University's mission. The department seeks to preserve and enhance Cal Poly Pomona's history, aesthetics, physical assets and natural ecosystems through coordinated location, design and construction of buildings, roads, infrastructure, landscaping, and other physical improvements. As an advocate on behalf of the university and its auxiliaries, Facilities Planning and Management strives to provide facilities that meet scope, budget, operational needs and functional requirements in a cost effective and timely manner. FP&M administrative departments/units include:

- Facilities Administration Services
- Facilities Management
- Facilities Planning, Design and Construction
- Environmental Health & Safety

Vision
Facilities Planning & Management’s vision is to be recognized by the campus community for excellence in service and to support the polytechnic learning environment.

Mission
To support the mission of the university by providing and maintaining a safe and sustainable learning environment.

Core Values
- We value collaborative efforts with our peers
- We value honesty and openness in our interaction with the campus
- We value the dedication and commitment our employees bring to the job
- We encourage personal initiative and creative solutions

Strategic Planning Goals
- Develop processes that ensure reliability of campus resources and sustainable measures
- To establish the best practices for project management within the CSU system
- Use cost effective technology where it will streamline planning management
- Compliance with current environmental health and safety regulations
Description: To implement the full use of the project management software program Prolog 2008 for management of all Cal Poly Pomona major capital outlay projects by the end of the fiscal year 2010/11.

<table>
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<th>Outcomes/Improvements</th>
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</thead>
</table>
| • Utilize Prolog 2008 for all: RFI’s (Request for Interpretation), FI’s (Field Instructions), CO’s (Change Orders); CP’s (Change Proposals), COR’s (Change Order Requests), Change Order (CO) Logs, IOR (Inspector of Record) Reports, Inspection Requests, Budget Reports, Contingency Balance Reports, Payment Processing/Tracking, and Submittal Tracking on the College of Business Administration Phase I project. | Management of all Cal Poly Pomona Major Capital Outlay Projects | • Bruyn Bevans  
• Eric Bellman | 4th quarter of 2008/09 |
| • Incorporate into our appropriate campus construction specifications the requirement for full implementation of the Prolog 2008 project management software system in compliance with all CSU management practices for all major capital outlay projects. | | | |
Description: Use cost effective technology where it will streamline information management and work processes.

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</thead>
<tbody>
<tr>
<td>Use The Management Authority (TMA) as a “host” database for the Space and Facilities Database (SFDB)</td>
<td>Number of building spaces reconciled between TMA, SFDB and building plans.</td>
<td>• Walter Marquez</td>
<td>4th quarter of 2008/09</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Eric Bellman</td>
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</table>
**Description:** To improve Facilities Management support of campus events by clarifying responsibilities and improving communication between the various entities on campus and streamline the process.

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<tbody>
<tr>
<td>Proper scheduling, staffing and support of all sponsored and licensed events on campus.</td>
<td>Successful events with minimal negative campus impacts.</td>
<td>Mark Miller</td>
<td>Ongoing</td>
</tr>
<tr>
<td>Improve communications with all departments by providing guidelines and a consistent method for event planning and scheduling.</td>
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<tr>
<td>Clarity of responsibilities and issues between the various departments.</td>
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</table>
**Facilities Planning & Management**

**2009/10 Initiative: Accurate information and improved space management.**

**Description:** Accurate information and improved space management.

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</tr>
</thead>
<tbody>
<tr>
<td>Space and Facilities Database (SFDB) linked to Geographical Information Systems (GIS) formatted building plans.</td>
<td>Number of building spaces reconciled with SFDB and building plans.</td>
<td>Ray Morrison</td>
<td>June 2010</td>
</tr>
</tbody>
</table>
**2009/10 Initiative: Accurate documentation, storage, and retrieval of information**

**Description:** Campus mapping, documenting, survey and Global Positioning System (GPS) locating of utility systems and development of a Geographical Information Systems (GIS) software and database.

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Utility systems are located, documented in databases that are linked to GIS formatted campus map.</td>
<td>Number of utility systems surveyed and documented, databases developed and maps prepared.</td>
<td>Walter Marquez</td>
<td>June 2010</td>
</tr>
</tbody>
</table>
Finance and Administrative Services is a service organization and a strategic partner with all units of the university. In addition, the division provides financial management oversight to all university auxiliary units, including Cal Poly Pomona Foundation, University Educational Trust, and Associated Students, Incorporated.

There are four departments within Finance and Administrative Services:

- University Accounting Services
- Student Accounting & Cashiering Services (SACS)
- Budget Services
- Procurement & Support Services

**Vision**
Our vision is to be valued by the campus community as trustworthy, honest and fair concerning all financial responsibilities for the campus.

**Mission**
Ensure the university’s fiscal integrity through expert financial management services.

**Core Values**

- Trust--We will trust all to be honest and faithful to each other in every task, joint or group endeavor or responsibility, and to make all decisions in the best interests of our organization and the university
- Courage--We will be accountable and answerable for our actions
- Honesty--We will be straightforward with facts and information--refusing to mislead in any manner
- Ethics, Fairness--We pledge conformance to accepted professional standards of conduct with complete impartiality and honesty

**Strategic Planning Goals**

- To assure integrity and promote accountability
- To be timely, responsive, and accurate
- To provide open communications and shared information
- To engage in continuous process improvements including development, streamlining and documentation
2009/10 Initiative: Coordinate the balancing of the 2009-10 budget with the prospect of severe funding shortages.

Description: Coordinate with all divisions to assure a balanced budget with a total university perspective.

<table>
<thead>
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<th>Timeline(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work with all divisions to assure that resource reductions are fair, objective, and planned with a total university perspective.</td>
<td>A balanced budget that minimizes what will be significant negative impacts.</td>
<td>Mark Lopez</td>
<td>TBD</td>
</tr>
</tbody>
</table>
**Finance & Administrative Services**

**2009/10 Initiative: To implement processing of Housing deposits for early entrants**

**Description:** Design a process for housing deposits of early entrants and establish a Housing Deposit account. This will strengthen internal controls over receipts of housing deposits for early entrants.

<table>
<thead>
<tr>
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<th>Timeline(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve customer service by enabling early entrants to make their deposits.</td>
<td>Number of deposits (early entrants)</td>
<td>Angelina Schultz</td>
<td>Winter 2010</td>
</tr>
<tr>
<td>Improve internal control on housing deposits for early entrants.</td>
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<tr>
<td>Maximize earnings on housing deposits.</td>
<td></td>
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<tr>
<td>Recognize receipt of funds in the general ledger as soon as funds are received.</td>
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<tr>
<td>Provide summary to Housing of students who have made deposits.</td>
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</tbody>
</table>
**2009/10 Initiative: Formalize Cash Procedures to include the Foundation and ASI**

**Description:** Add the Foundation and ASI to the existing Cash Procedures.

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<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>• Ensure that personal information of students, i.e. credit cards, social security numbers, and other personal information items are safeguarded.</td>
<td>One document to cover the university, the Foundation, and ASI.</td>
<td>Angelina Schultz</td>
<td>Fall 2009</td>
</tr>
<tr>
<td>• Strengthen internal controls for the entire campus.</td>
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<tr>
<td>• Support the entire campus’ PCI (Payment Card Industry) compliance.</td>
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</table>
**Description:** Develop method of reconciling and properly recording in-kind gift contributions to the University from auxiliary organizations.

<table>
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</tr>
</thead>
<tbody>
<tr>
<td>• Properly report in-kind gift contributions to the university from the auxiliary</td>
<td>No audit discrepancy at year end.</td>
<td>GAAP and Tax:</td>
<td>September 2009</td>
</tr>
<tr>
<td>organizations.</td>
<td></td>
<td>• Candance Snodgrass</td>
<td></td>
</tr>
<tr>
<td>• Eliminate non-exchange transactions in the statement of net assets and statement</td>
<td></td>
<td>• Jocelyn Wagar</td>
<td></td>
</tr>
<tr>
<td>of revenues, expenses, and changes in net assets, as applicable.</td>
<td></td>
<td>• Al Viteri</td>
<td></td>
</tr>
</tbody>
</table>
## 2009/10 Initiative: Transition to E-requisitioning with the help of AAIS, University Accounting and Budget, as required

**Description:** Automate the requisitioning process to eliminate redundant steps and reduce waste through eliminating paper requisitions.

<table>
<thead>
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</thead>
<tbody>
<tr>
<td>• Automation of the requisition process</td>
<td>Number of e-requisitions</td>
<td>Kathleen Prunty</td>
<td>TBD</td>
</tr>
<tr>
<td>• Elimination of paper waste</td>
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</table>
Human Resource Services is an employee service organization and a strategic partner with campus departments/units in meeting their human resource needs. The wide range of human resource services provided to the Cal Poly Pomona campus include stewardship of CSU and campus rules, procedures, and processes for consistently hiring, classifying, training, and managing the organization’s management and staff workforce. For all faculty, management and staff, HRS provides diversity and compliance, payroll, benefits, workers’ compensation and risk management programs and services. HRS administrative departments/units include:

- Diversity & Compliance
- Payroll Services
- Human Resources
- Organizational Development & Training

Vision
Our vision is to be a valued resource and strategic partner, through continuous assessment, improvement, and use of technology.

Mission
Human Resource Services provides quality services, resources, and programs through partnerships and innovative solutions.

Core Values
- Customer Service—Provide timely, professional, courteous, quality services with integrity, accountability, and flexibility
- Communication—Promote a collaborative and consultative environment that includes listening and learning, individually and as a team
- Knowledge—Maintain a high level of current subject matter expertise
- Being Green—Promote practices that support environmental and resource stewardship in all HRS operations

Strategic Planning Goals
- Partner strategically with the campus community in support of the university’s mission
- Attract, develop, and retain a qualified, diverse workforce
- Leverage the use of technology to communicate and administer HRS programs
- Protect the university’s physical and human assets and ensure business continuity
- Ensure continuous quality improvement, emphasizing communication, feedback, customer service, and employee participation
**2009/10 Initiative: Develop and implement training needs assessment**

**Description:** As a prelude to implementing future training activities and programs, ODT will develop and conduct a staff training needs assessment survey to determine training needs within the existing program and assess areas of interest for the campus community. The results captured in this survey will assist ODT in designing future training activities.

<table>
<thead>
<tr>
<th>Outcomes/Improvements</th>
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<th>Person(s) Responsible</th>
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</thead>
</table>
| Gain staff/management feedback on current staff training needs and interests. Develop programs to meet those needs and interests based on this feedback. | - Survey response rate (measures success of implementation of survey tool)  
- Number of program registration requests (measures success of program topic selection based on feedback)  
- Workshop evaluation responses showing satisfaction with topics offered (measures overall success of survey, topic selected, and program development) | - Training Facilitator  
- Training & Development Coordinator  
- Intern | 2009/2010 fiscal year |
**Human Resource Services**

**2009/10 Initiative: Staff exit interviews**

**Description:** Review, analyze, and improve the current exit interview questionnaire and process

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| • Research and determine improvements to the staff exit interview process and form(s) in order to increase response levels. | • Increase in number of exit interviews completed to a sufficient level to provide useful data for analysis. | • Employment Services  
• Employee/Labor Relations  
• Payroll Services | • Analysis and form/process improvements to be completed by end of December 2009.  
• Implementation of new form/process to be made in January 2010 and results to be measured through June 30, 2010.  
• Results will be reviewed during summer 2010 to determine if changes have yielded a successful response rate and whether the process and survey tool can be further improved. |
**Human Resource Services**

### 2009/10 Initiative: Develop Sample Paycheck Stub (Earnings Statement)

**Description:** Develop a webpage that provides a sample paycheck stub (earnings statement) with descriptions of the various sections in order to improve employee knowledge of the items reported on their monthly earnings statement.

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<tbody>
<tr>
<td>• Improved payroll outreach/communication with campus employees that results in increased employee knowledge and review of the various items reported on their monthly payroll earnings statement.</td>
<td>Improve employee knowledge of items reported on earnings statements, as measured by customer inquiries and feedback to Payroll Services.</td>
<td>Payroll Services</td>
<td>Spring 2010</td>
</tr>
<tr>
<td>• Possible improvement in the timeliness of employee inquiries to changes/possible errors in payroll deductions (health insurance, life insurance, TSA deductions, etc.).</td>
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</tbody>
</table>
## 2009/10 Initiative: Develop guidelines based on Appendix 14 for MPP searches

**Description:** Develop guidelines/tutorials to assist MPP recruiters in following Appendix 14, including steps to help achieve diverse applicant pools.

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<tr>
<td>• Increase resources available to promote the successful recruitment of diverse MPPs.</td>
<td>• Feedback from MPP hiring authorities.</td>
<td>Carmen Munoz-Silva</td>
<td>Implementation Winter 2010</td>
</tr>
<tr>
<td>• Add clarity and consistency to directions provided to faculty recruiters about the importance of MPP diversity.</td>
<td>• Improved process and adherence to Appendix 14 and exchange of information with Diversity and Compliance.</td>
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</tbody>
</table>
**Description:** Develop communication and resource tools for implementation of the “Benefits Admin” view only self service functionality for health benefit enrollments.

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<tbody>
<tr>
<td>Assist AAIS in development of guides and tools for employees on how to view the self service functions available through PeopleSoft’s Benefits Administration.</td>
<td>Successful implementation of the view only self service functionality of PeopleSoft’s Benefits Administration.</td>
<td>• Benefit Services • AAIS</td>
<td>Summer 2010</td>
</tr>
</tbody>
</table>
Description: Coordinate campus participation in the new CalPERS Enrollment Management System. Under the guidance of CalPERS, work with AAIS in implementation and set up of the software. This includes software testing, procedure mapping, and operational procedures. There are three phases to the project—testing, training, and implementation.

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<tr>
<td>Benefits will be able to generate a variety of CalPERS reports not currently available, such as reports regarding annual statements, and medical plan enrollments.</td>
<td>Successful implementation of PSR.</td>
<td>Benefit Services</td>
<td>Spring 2010 is CalPERS’ target for the implementation and/or “Go Live”</td>
</tr>
<tr>
<td>More user friendly enrollment processing capabilities and access for campus benefits staff.</td>
<td>Ability to generate enrollment reports, annual statement reports, etc.</td>
<td>AAIS</td>
<td></td>
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</table>
Description: Develop an online orientation/tutorial that describes the different retirement programs, eligibility, payroll deductions/contributions, annual statements, web access and resources, and other key information to assist new hires in understanding the retirement program they contribute to through their Cal Poly Pomona/CSU employment.

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<tr>
<td>• Program for employees to view as part of their new hire or campus benefits orientation.</td>
<td>• Successful implementation of orientation program.</td>
<td>• Payroll Services</td>
<td>Spring 2010</td>
</tr>
<tr>
<td>• Program will provide consistency of message and be available 24 hours a day, 7 days a week.</td>
<td>• Feedback from employees/new hires</td>
<td>• Benefit Services</td>
<td></td>
</tr>
<tr>
<td>• Provides easy access as a refresher for employees who cannot remember what was presented during their new hire or benefits orientation.</td>
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</table>
**Human Resource Services**

**2009/10 Initiative: Implement Business Continuity Planning Tool**

**Description:** Obtain, customize, and program Web-based Business Continuity Planning (BCP) tool (UC Berkeley tool) for campus wide implementation.

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| • Programmer Training on software to support the BCP tool. | • Successful implementation of the tool.  
• Departments who own a critical function to have begun development of their Business Continuity Plan (BCP). | • BC Coordinator  
• AAIS  
• Risk Management  
• BCP Committee | Summer 2010 |
| • Modify and program the tool to make it Cal Poly Pomona specific. | | | |
| • Put the tool into production environment and complete testing. | | | |
| • Departments who are owners of identified critical functions will begin using the tool to complete their BCPs. | | | |
| • Develop a user training program. | | | |
| • Provide assistance and consultation to departments in development of their plans. | | | |