

2023-2024 FINANCE AND ADMINISTRATION



ANNUAL REPORT AND ASSESSMENT UPDATE 2023-2024 FISCAL YEAR

STATE UNIVERSITY OF NEW YORK AT FREDONIA

The Finance and Administration division is comprised of 8 departments, which include 38 distinct operating units and 288 employees. This is the 27th year that this report has been issued. The purpose of the report is to provide an annual update to the campus on the operation of each of these units within the division, and to report on the various assessment activities that each unit has undertaken.

The strength of Fredonia and the Finance and Administration division continues to be the hard-working, dedicated employees that perform a wide range of services throughout the campus. For the past 22 years, the Finance and Administration division has recognized individuals from within the division who have demonstrated a solid team effort in their everyday actions, an outstanding Fredonia service attitude, creativity and resourcefulness in improving services, and a positive attitude in working with students, faculty, and staff. The Outstanding Administrative Services Awards annually recognize outstanding performance within Finance and Administration. Awards are presented in the following five areas:

1. Administrative Support
2. Custodial Services
3. Professional Trades
4. FSA Operational Services
5. Professional Staff (FSA and University)

The front cover of the 2023-2024 Annual Report and Assessment Update features the five winners of the 2024 Outstanding Administrative Services Awards. Beginning at the top left and going clockwise are:

Roberta Loomis—Outstanding Administrative Services Award—FSA Operational

Roberta, of the Faculty Student Association (FSA), is currently a Cook in Cranston Marche. She began her career at FSA in September 1999. Roberta is a resident of Dunkirk.

Katie Bixby—Outstanding Administrative Services Award—Administrative Support

Katie, from Administrative Support, was an Administrative Assistant in the University Police Department. She began her career at Fredonia in August 2009 and has recently retired in July 2024. Katie is a resident of Fredonia.

Jeffrey Deering— Outstanding Administrative Services Award—Custodial Services

Jeffrey, from Custodial Services and a Janitor, began his career at Fredonia in June 2011. Jeffrey is a resident of Cassadaga.

Gretchen Fronczak—Outstanding Administrative Services Award—Professional Staff

Gretchen, a member of the Professional Staff and Capital Project Assistant in Facilities Planning. She began her career at Fredonia in February 2009. Gretchen is a resident of Silver Creek.

Daniel Halas—Outstanding Administrative Services Award—Professional Trades

Daniel, from the Professional Trades, is a Plant Utilities Engineer 1. He began his career at Fredonia in November 2000. Daniel is a resident of Fredonia.

A summary of the Outstanding Administrative Service Awards winners from the past 15 years is presented on the inside of the back cover of this report.

State University of New York at Fredonia
Finance and Administration

Annual Report and
Assessment Statement

July 1, 2023 – June 30, 2024

STATE UNIVERSITY OF NEW YORK AT FREDONIA

**Finance and Administration
Annual Report and Assessment Statement**

July 1, 2023 – June 30, 2024

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INTRODUCTION

This 2023-2024 edition of the ***Finance and Administration Annual Report and Assessment Update*** represents the 27th year that this report has been presented. This report is intended to provide an overview of the finance and administrative services provided to the State University of New York at Fredonia campus, and an update of the status of assessment activity undertaken by each unit within the Finance and Administration Division.



From left to right: Judy Langworthy and Rhonda Gominiak

Finance and Administration employees serve as stewards of Fredonia's financial and physical resources while providing quality customer service and support to students, faculty, staff and campus visitors.

The over-arching goal of the Finance and Administration Division is to support the Fredonia Mission Statement by:

- *Assuring strong financial management practice and services*
- *Providing a safe and supportive educational environment*
- *Providing outstanding service to all customers of the Fredonia campus*
- *Assuring well-maintained buildings and grounds*
- *Supporting the region's economic and educational development*

A copy of the Fredonia Mission Statement is included in Appendix B.

The Finance and Administration Division is comprised of eight departments with 233 Full-time Equivalent (FTE) positions.

A brief summary of the responsibilities of the eight departments included within the Finance and Administration Division is presented below.

1. Vice President for Finance and Administration

This department includes the Office of the Vice President for Finance and Administration. Responsibilities of this office include the overall supervision and coordination of various financial and administrative departments within the division. This office also interfaces with the other divisions on the Fredonia campus, SUNY System Administration, and other New York State agencies including the SUNY Construction Fund (SUCF), the Dormitory Authority State of New York (DASNY), the Office of the New York State Comptroller (OSC), and SUNY Research Foundation.

2. Associate Vice President for Finance and Administration (Financial Services)

This department is responsible for all financial operations on campus. The unit consists of the offices of University Accounting, Student Accounting and Revenue Accounting, the Budget function, University Payroll Services and University Services.

3. Environmental Health and Safety and Sustainability

This department is responsible for all environmental and safety training as well as compliance oversight. The Environmental Health and Safety and Sustainability Office serves as campus liaison with all environmental and safety regulatory organizations. This office is also responsible for Emergency Planning and Preparedness.

4. Facilities Planning

This department is responsible for all major capital facilities project development, coordination, and oversight. The Facilities Planning Office serves as a liaison with the SUNY Construction Fund and the Dormitory Authority State of New York.

5. Facilities Services

This department is responsible for all campus maintenance functions and many smaller sized construction projects. The department is comprised of four units which include: the Capital Projects, Energy and HVAC unit which consists of Building Automation Systems, HVAC/R (Heating Services / Refrigeration / Air Conditioning) and Project Management; the Custodial Services unit and Grounds and Landscaping; the Facilities Trades Services unit which consists of Electrical, Plumbing, and Structural Trades; and Office Operations.

6. Faculty Student Association (FSA)

The Faculty Student Association is responsible for providing auxiliary services to the University. This department consists of seven units that include: Faculty Student Association Corporate operations, Food Service operations, Bookstore operations, Human Resource services, Support Services operations, Information Technology services, and Special Events, Marketing and Licensing services.

7. Internal Control

This department is responsible for campus compliance with New York State and SUNY Internal Control and E-Discovery programs. This office also provides campus-wide training on internal controls, conducts internal controls reviews, coordinates Freedom of Information responses, and provides leadership and coordination of the campus TouchNet Marketplace.

8. University Police

This department is responsible for the security of all Faculty, Staff, Students and Facilities. The University Police Department (UPD) is a 24/7/365 police agency which is fully authorized to enforce all New York State laws on our campus. UPD at Fredonia is accredited by the New York State Law Enforcement Accreditation Council, which is considered the “gold standard” of professionalism in policing.

Presented below is a summary of all staffing in the nine departments that comprise the Finance and Administration Division. Staffing in this chart reflects budgeted FTE positions for the fiscal year July 1, 2023 to June 30, 2024. Individual department narratives which follow in this report may reflect actual filled positions and temporary employees, as opposed to the budgeted personal service FTE positions reflected in this chart.

FREDONIA
Finance and Administration Division
2023-2024 Departmental Staffing by Funding Source

Administrative Office	State	DIFR	IFR	SUCF	FSA	Total
Finance and Administration	4.00					4.00
Environ. Health & Safety & Sustainability	1.18	0.46				1.64
Facilities Planning	1.25	0.25		1.80		3.30
Facilities Services	78.65	43.75				122.40
Faculty Student Association					110.00	110.00
Financial Services	16.20					16.20
Internal Control	1.00					1.00
University Police	10.20	8.80				19.00
University Services	8.80	1.20				10.00
	121.28	54.46	0.00	1.80	110.00	287.54

Notes:

- a) The FSA employment number includes 55 full-time and 55 part-time employees.
- b) Student Assistants are not included in this Departmental Staffing by Funding Source table.

Finance and Administration

VICE PRESIDENT FOR FINANCE AND ADMINISTRATION

Introduction

The Vice President for Finance and Administration serves as the Chief Financial Officer on campus and supervises the Finance and Administration Division. The eight Administrative Departments included in this 2022-2023 Annual Report are:

1. Vice President for Finance and Administration
2. Associate Vice President for Finance and Administration
3. Environmental Health and Safety and Sustainability
4. Facilities Planning
5. Facilities Services
6. Faculty Student Association
7. Internal Control
8. University Police

Mission Statement

The Vice President for Finance and Administration works collaboratively with the campus community to ensure the fiscal stability and integrity of the campus. The Vice President provides leadership and coordinates the administrative, financial, auxiliary, capital and facility services, and assures that these services are of the highest quality for Fredonia's students, faculty, and staff and are provided in the most cost effective manner possible.

Finance and Administration employees serve as stewards of Fredonia's financial and physical resources while providing quality customer service and support to students, faculty, staff and campus visitors.

Annual Report

The University continues to face significant financial challenges. Declines in enrollment, modest increases in New York State annual support, increased costs and many unfunded mandates produced Structural Deficits over the last ten years. During the 2023-2024 fiscal year, the Vice President's Function provided coordination and leadership across the Campus. The accomplishments and initiatives of each operating area are summarized in the following sections of this report.

Significant Accomplishments:

- Prepared and gave multiple presentations regarding the University's financial situation.
- Continued to reduce F&A expenses to align with declining enrollment.
- Properly aligned expenses and fees to functions/divisions.
- Facilities Planning along with Facilities Services, Finance and Administration and the Construction Fund are in the process of continuing to refine the Campus Five-Year Capital Plan to fit within yearly spending caps and to establish funding requirements for major capital projects
- FSA is in communication with the NYSSSA (New York State Summer School for the Arts) office in Albany reminding them that that Fredonia remains ready and willing to host the programs if funding gets restored. Last year, NYSSSA was on campus with three programs: Theater, Media Arts and Visual Arts. The 150 students resided in Chautauqua Hall and the 45 faculty resided in the Townhouses.

Assessment remains an important process throughout the Finance and Administration Division. The completion and publishing of this Annual Report reflects the division's culture of customer service and assessment.

Associate Vice President for Finance and Administration

- **Budget Office**
- **Payroll Services**
- **Student Accounts**
- **University Accounting**
- **University Services**

ASSOCIATE VICE PRESIDENT FOR FINANCE AND ADMINISTRATION

Introduction

The financial services offices, under the leadership of the Associate Vice President for Finance and Administration (AVPF&A), are responsible for all campus financial operations. This unit includes the offices of Budget, Payroll Services, Student Accounts, University Accounting, and University Services. Together these areas provide the data, service and reporting necessary to:

- Provide valid and credible budget and revenue information to allow for effective planning and development of academic programs and student services.
- Direct all state funded payroll efforts to ensure that every employee is paid accurately and timely.
- Monitor the source and method of collection utilized for all revenue to ensure compliance with State and SUNY accounting policies.
- Expedite the purchase of supplies and equipment for campus constituents and provide review of contracts ensuring compliance with State guidelines.
- Ensure prompt payment of all expenses incurred by the University and its employees in conducting University related business.
- Monitor expenditures to ensure compliance with State and SUNY regulations and ensure spending is kept within budget.
- Prepare timely and accurate tuition, fee, housing and food service billing for every registered student to maximize collections and minimize year-end receivable balances.



Judy Langworthy

These areas work with fellow staff and SUNY colleagues to coordinate and streamline procedures, and test and develop new technologies in order to maximize limited resources and increase operating efficiency. Each of these areas strives to provide a supportive environment to faculty so as not to burden them in their performance of routine administrative functions, allowing them to focus their energies on the teaching and learning process.

The offices under the Associate Vice President for Finance and Administration most directly affect the education of students through employment. Students are provided hands-on working experience that benefits them when they enter the job market upon completion of their formal education.

Mission Statement

The departments encompassed by the office of the Associate Vice President for Finance and Administration strive to provide accurate and timely financial data to both our internal constituents (faculty, staff and students) as well as our external constituents (System Administration, Office of the State Comptroller [OSC], University Audit, SUNY Construction Fund [SUCF], the Dormitory Authority of the State of New York [DASNY], and other related state agencies). It is our intention that the University's mission of teaching and learning proceed unencumbered by our administrative responsibilities.

Annual Report

The Associate Vice President for Finance and Administration is responsible for providing leadership and supervision for all campus financial operations, acting as an advisor and resource to managers and supervisors within the division as well as colleagues throughout the campus. This position serves as a liaison with SUNY System Administration financial offices and representing the Finance and Administration Division in the absence of the Vice President.

Specific duties of the Associate Vice President include oversight for the preparation and submission of the annual campus revenue target, which after System Office approval, becomes the basis for preparation of the campus operating budget. The campus revenue projections are comprised of tuition, college fee, and interest, based upon enrollment figures approved by Cabinet. Initial revenue projections are typically prepared in mid-fall with finalized projections submitted in the spring; updates to approved plans are required at the end of the third week (the official census date) of both the fall and spring semesters.

In addition to the revenue target, the campus has an obligation to meet our Fringe Benefit Target, which is calculated by the System Office based upon a three-year rolling average of past collections. Fringes are earned on personal service expenditures in the IFR, SUTRA and DIFR funds. Quarterly reports of actual earnings are monitored along with projections based on budgeted expenditures to ensure that we are on target and/or prepared to cover any shortages through other funds. Fringe benefit collections are managed on the System level to cover the cost of all benefits afforded to every campus employee.

Additional responsibilities include coordination among faculty, department chairs, deans, vice presidents, and the President in the preparation and submission for approval of new course fees as well as requests for fee increases; various analyses related to the Income Fund Reimbursable accounts (IFR), the Dormitory Income Fund Reimbursable accounts (DIFR) and the State University Tuition Reimbursable accounts (SUTRA); analysis of revenue requirements for State funded scholarships; oversight of year-end fiscal closing procedures; service to the campus through committee work and participation in campus sponsored events.

The AVPF&A leads divisional efforts to comply with finance-related requirements of the State and the System Administration Office, and works with Cabinet members and the budget office staff to address the campus financial position, providing account analysis, cash management, financial reporting, and strategic vision and forecasting.

Significant Accomplishments

- Worked with the Offices of Budget, University Accounting, and Purchasing to assure that all records were completed and closed per System Administration deadlines without any lapsing of State funds.
- Throughout year-end proceedings, all budgeted allocations were closely monitored; when and where appropriate, expenditures were transferred to alternate funds in order to optimize every budgeted dollar and provide roll-over funds to cover anticipated new-year shortfall.

- Coordinated the successful passage of new course fees in Arts, Biology, Communication, and Physical Education. Plus, approval was secured for the 2023-2024 broad-based fees, in which the overall amount increased \$2 per semester due to an increase in the student activity fee.
- Prepared detailed analysis of available funding and projections for new and current campus-based scholarship offerings.
- Participated in conference calls with System Administration personnel, as well as SUBOA and ABB counterparts.
- Active on several campus committees, including the Faculty Student Association (FSA), State Employees Federated Appeal (SEFA) Committee, Jewett Hall Rehab Committee, Institutional Effectiveness Committee, Scholarship Affordability Committee, Jaggaer Improvement Committee, and Commencement Committee, as well as continuing to serve on the SUNY Fredonia Federal Credit Union Board as secretary.
- Participated in virtual meetings with the SUNY Jaggaer Team, SUNY campuses, and Fredonia personnel as we continue to improve the eProcurement software on our campus.
- Generated and submitted requested information to the SUNY University Audit team to satisfy the use requirements of our federal HEERF funds.
- Worked with campus constituents and Cabinet to formulate a plan to erode our strategic deficit over five years. Work on the plan will continue in FY 2023-2024 and be updated throughout the years as necessary.

Assessment Update

Assessment Statement

The Associate Vice President for Finance and Administration serves as a resource to the Vice President of the division as well as peers, deans, directors and department chairs on financial matters, administrative policies and capital construction projects. This unit provides credible and timely budget, revenue, financial analyses, and capital construction information to allow for effective planning and development of academic programs and student services.

Assessment Activities

Actively monitor listserv communications, conference calls and webinars provided by the State University Business Officers Association (SUBOA), the Accounting/Budget/Bursar Group, System Administration and the Office of the State Comptroller in order to stay up-to-date on financial, construction, Executive Orders and administrative directives, and provide relevant and timely feedback to the Vice President and relevant constituents.

Work closely with the Budget Office on the fiscal year-end closing proceedings, ensuring that all funds are utilized in the most effective manner and that no state appropriations lapse. Maintain close working relationships with the vice presidents, associate vice presidents, deans and directors providing instruction, guidance and analyses which is, in part, responsible for the sound financial condition of their respective accounts at year-end.

On a monthly basis, update a detailed analysis of current and proposed campus funded scholarships, providing campus personnel with realistic projections leading to informed awarding and budgetary decisions.

Coordinate the collective efforts of the financial team in completing all reporting requirements and implementation of System and State mandates.

Conduct regular individual department head meetings to share information and guide the efforts of the team in accomplishing our goal of service excellence to the campus community.

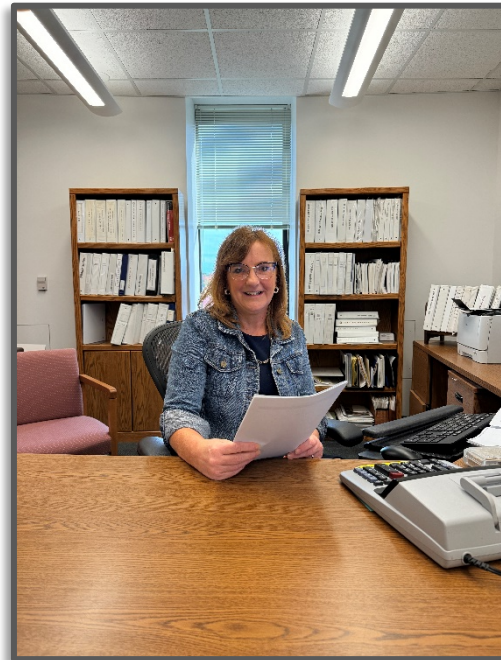
Assessment Goals

- Provide clear and concise financial data to the Vice President for Finance and Administration and assist them with cabinet level efforts to address the structural deficit in our operating budget.
- Work with the Budget Office, the Enrollment Office, Cabinet, and System Administration to achieve an approved structural deficit plan with Fredonia in the black by the end of fiscal year 2028-2029.
- Assess the effects of flat state support, unfunded contractual salary increases, TAP-Gap requirements, Excelsior scholarship program, and fluctuating enrollment to provide accurate data in the development of the operating budget.
- Coordinate the efforts of the financial units in responding to requests, implementing external mandates and the timely completion of reporting requirements received from the System Office, the State Comptroller, University Audit and the Construction Fund.
- Ensure that year-end accounting and purchasing procedures are completed and closed without any lapsing of State funds.
- Assist departments and divisions with concerns regarding the campus Expenditure/Reimbursement Guidelines.
- Ensure timely submission of broad-based fee and course fee requests to System Office.

Budget Office

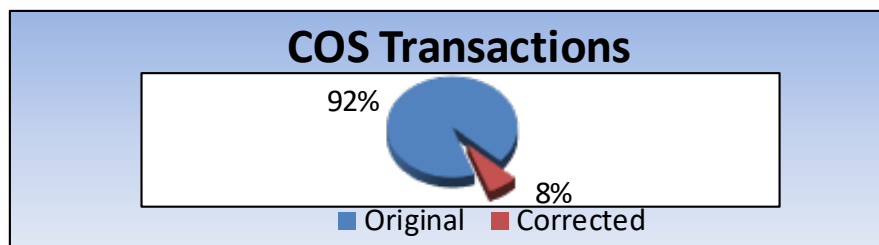
Annual Report

Upon passage of the annual New York State budget, the Budget Office is responsible for calculating the appropriate allocation to be distributed to the President and each Vice President based on Cabinet decisions that support the mission and goals of the University. The Budget Office is also responsible for calculating salary needs and apprising each division of the allocation amount necessary to support current staffing. An executive summary of allocations (Form 1) is submitted to SUNY System Administration and is provided to Cabinet along with supporting detailed salary information, with individual departmental allocations distributed to department heads. The Budget Office continually advises faculty and staff concerning budget and payroll matters, implements the effects of various budget/payroll decisions and inputs requested allocation transfers between expense objects within departments as well as allocation transfers between departments.



Ann Aldrich

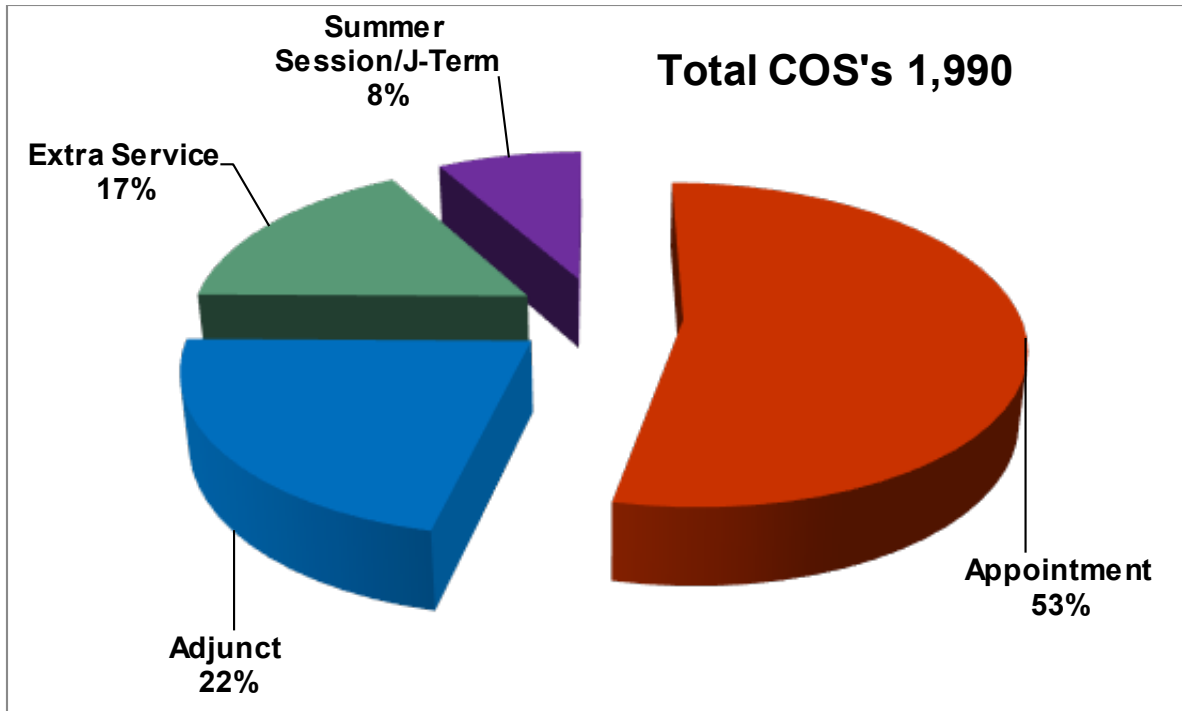
All campus appointments, changes in appointment or terminations (except Faculty Student Association [FSA] and Student Association [SA]) are routed through the Budget Office on an automated Employee Action Form, also known as a “COS” or Change of Status Form. The online COS System provides administration with a system of checks and balances as well as the supporting documentation to back up personnel and payroll transactions. Past and present COS’s are conveniently available for viewing at any time by staff with the appropriate security access. Currently there are over 100 online COS users from more than 50 departments. Please refer to the following charts for processing statistics.



**Totals do not include 77 inactive COS's*

COS's Original/Corrected

Original	1,839
Corrected	151
Total	1,990



Number of COS's by Type

Adjunct	419
Appointment	1,033
Extra Service	322
Summer Session/J-Term	216
Total	1,990

In addition to verifying fund availability for all payroll transactions, the Budget Office is responsible for identifying an employee line number from the Schedule of Positions, supplying title codes, calculating appropriate Full-time Equivalent (FTE) level (if other than full-time), and checking appropriateness of salary for grade level. New lines must be established through the classification process while reclassification is required for any existing line where there is a discrepancy between current position record and intended employee status. Appropriate information is transmitted to SUNY System Administration.

Other responsibilities of the Budget Office include analysis of revenue and expenditures within various Income Fund Reimbursable (IFR) accounts. On a monthly basis, these analyses along with financial reports detailing summary findings of budget variances are distributed to the vice presidents, associate vice presidents & provosts, directors and deans in Academic Affairs, Student Affairs, President's Office, Enrollment and Management Services, and University Advancement. Monthly meetings are held with Administration Finance personnel to discuss the reports of all divisions. Prearranged meetings are held with divisional personnel to review reports and address areas of fiscal concern.

The Budget Office is also responsible for biweekly reconciliation of administrative and graduate assistant payroll. The Budget Office maintains adjunct budget projections on a monthly basis.

The office is staffed by a Budget Director (UUP). The Financial Analyst position has been vacant since January 1, 2023 and the position was frozen for the 23-24 year.

Significant Accomplishments:

- Worked in conjunction with the Finance and Administration personnel to identify any budgetary actions and possible cost saving measures or revenue opportunities for the university.
- Worked with Divisional Leadership to identify permanent budgetary reductions across campus.
- Garnered and tracked savings from implementing hiring delays and position freezes.
- Submitted Fredonia's Form 1 spreadsheet detailing department level allocations used to populate the SUNY's Business Intelligence (BI) and accounting system. Incorporated all budgetary changes and reductions.
- Completed the Residence Hall Capital Plan and the DIFR Financial Plan. In doing so, collaborated with Student Affairs, and Finance and Administration personnel to realign resources and implement different options in order to cut down on borrowed funds.
- Completed the annual DIFR Budget. Worked very closely with the Residence Hall Director, Information Technology (IT) & other directors to ensure budget figures were at appropriate levels.
- Processed several analyses, ad-hoc reports, and provided data for various survey and information requests. Highlights included completion of CFRP and the UBIT.
- Completed Fredonia's 2023-2024 Campus Financial Management Strategies (FMS) Documents. These documents included operating budgets and cash management by fund along with a campus narrative detailing the campus' strategic plans for sustainability. Also completed the new NASH Survey requested by System Administration.
- Continued tracking the history of all lines and funded FTEs by department.
- Processed 2,067 (1990 active plus 77 inactive) COS's, verifying funding and updating SUNY HR and various internal spreadsheets.
- The Budget Director continued to serve on the Information Technology Advisory Board (ITAB) and the Strategic Planning Steering Committee. The Director also served on the search committee for a new Vice President (VP) for Finance and Administration (F&A) as well as the committee for the elevated position of Vice President for Enrollment Management Services. The search for VP of Enrollment Management Services resulted in a successful hire. The VP for F&A search is continuing.
- Developed and maintained various budget forecasts with the Cabinet's budget assumptions and plans for enrollment.
- Worked with Finance and Administration personnel to successfully utilize all of the State budget allocation in order to maximize State funding.
- Kept track and insured all monies were spent and accounted for accurately for special grants secured during the year such as the Promoting Recruitment, Opportunity, Diversity, Inclusion and Growth (PRODiG,) and Ed Leadership grants as well as special funding arrangements for UUP & College Foundation reimbursements for various salary buyout proposals.
- The Budget Office submitted the remaining FEMA documentation related to pool testing costs incurred during the COVID-19 pandemic.

- Worked in conjunction with the President's Cabinet and SUNY System administration to come up with a Deficit Reduction Plan (DRP) to successfully and systematically reduce the institutional budget shortfall over a five-year period.
- The Budget Office tracked all new monies awarded to SUNY Fredonia. These included all ongoing initiatives for specific activates totaling \$720,400 as well as one-time monies provided for the Accelerate, Complete, and Engage(ACE) program totaling \$960,000.

Statistical Data

The Fredonia 2023-2024 Consolidated Operating Budget totaled \$89,406,287, representing a decrease of \$1,943,171(2.13%) from the 2022-2023 Consolidated Operating Budget. Please refer to the following chart for comparative data for each of the six budget components.

Components	2023-2024	2022-2023	Change	Percent
University Operating Budget	\$ 56,942,103	\$ 56,353,315	\$ 588,788	1.04%
DIFR Budget	13,505,231	15,338,950	(1,833,719)	-11.95%
FSA Budget	11,639,454	12,068,794	(429,340)	-3.56%
IFR Budget	5,275,000	5,500,000	(225,000)	-4.09%
SUTRA Budget	1,310,000	1,300,000	10,000	0.77%
College Foundation	734,500	788,400	(53,900)	-6.84%
TOTAL	\$ 89,406,287	\$ 91,349,459	\$ (1,943,171)	-2.13%

The 2023-2024 budget provided funding for approximately 714 FTE employees. Please refer to the following chart for comparative FTE data for each of the six budget components.

Budget	2023-2024	2022-2023	Change
	Total FTE	Total FTE	Total FTE
University Operating Budget	523.11	506.53	16.58
DIFR Budget	65.46	69.86	(4.40)
FSA Budget	110.00	118.00	(8.00)
IFR Budget	8.61	8.61	0.00
SUTRA Budget	3.00	3.00	0.00
College Foundation	4.00	4.00	0.00
TOTAL	714.18	710.00	4.18

Note: All staffing is reported by personal service full time funded FTE's with the exception of the FSA. The FSA employment number includes part time and full-time employees.

The budget results for 2023-2024 proved to be more favorable than anticipated due to significant spending constraints that were put in place throughout the year. Although the results were more favorable, the campus did end up with an unfunded budget shortfall of over \$2.0M.

Fredonia's 2023-2024 FINAL Budget Results

Details	Budget Fall 3000/Spr 2730	Actual Fall 3221/ Spr 2994	Difference
<u>Financial Plan Revenues</u>			
State Support	\$13,185,900	\$13,185,900	\$0
State Ongoing Monies-Investments	\$720,400	\$720,400	\$0
State Additional Operating Aid	\$2,116,500	\$2,116,518	\$18
State Support - UUP Contractual	\$0	\$896,500	\$896,500
Interest	\$400,000	\$730,734	\$330,734
Tuition	\$21,916,767	\$23,127,485	\$1,210,718
Total Financial Plan Revenues	\$38,339,567	\$40,777,537	\$2,437,970
Total Base Expenditures	\$56,942,103	\$56,942,103	\$0
Surplus/Loss Structural Deficit	(\$18,602,536)	(\$16,164,566)	\$2,437,970
<u>Expenditure Shortfall Actions</u>			
Salary Savings	\$2,250,000	\$4,355,362	\$2,105,362
OTPS Savings	\$500,000	\$1,673,205	\$1,173,205
Total Expenditure Actions	\$2,750,000	\$6,028,567	\$3,278,567
Net Shortfall After Expense Savings	(\$15,852,536)	(\$10,135,999)	\$5,716,537
<u>Revenue Shortfall Actions</u>			
Institutional Recurring Sources	\$1,832,435	\$1,787,435	(\$45,000)
One Time Cash - Various Sources	\$4,698,271	\$5,571,611	\$873,340
New Full Time Faculty Funding	\$727,000	\$741,743	\$14,743
Total Revenue Shortfall Actions	\$7,257,706	\$8,100,789	\$843,083
Total Shortfall Actions	\$10,007,706	\$14,129,356	\$4,121,650
Unfunded Shortfall	(\$8,594,829)	(\$2,035,210)	\$6,559,620

Assessment Update

Assessment Statement

The Budget Office provides accurate budget allocations and periodic reallocations for all funds; ensures that every budgeted dollar that is not eligible to roll over to the succeeding fiscal year is spent prior to the current fiscal year end; and provides excellent customer service to all constituencies. The Budget Office serves as a resource for all budgetary questions, reports and analysis.

Assessment Activities

The University decreased its enrollment to 3,000 (headcount) for the 2023-2024 budget cycle from the previous year budget enrollment of 3,500. Actual Fall 23 enrollment came in at 3,221.

In lieu of a budget book, the Budget Office posted a consolidated summary table reflecting the 2023-2024 Consolidated University Operating Budget on its website page.

There were no changes to the COS system. Instead of a COS re-write, the Budget Office participated in Human Capital Management (HCM) Software vendor presentations. A new software vendor, Ellucian NeoEd, was selected. It is anticipated the new product will replace the current COS system.

The Budget Office developed a Proforma template for Academic Affairs to utilize when proposing a new four-year undergraduate program.

Collaboration efforts of networking with SUNY System Administration and other campuses continued throughout 2023-2024. The Budget Office has represented Fredonia in attendance at Accounting, Budget, and Bursar (ABB) meetings; sessions on Business Intelligence (BI), and SUNY System Administration trainings via zoom webinars and conference calls.

The Budget Office successfully submitted the 2023-2024 Form 1 and related Campus management Strategies to SUNY System. The Budget Office was able to successfully field numerous questions from System Administration in review of its submission.

The Office worked closely with the Residence Life Director, Information Technology (IT), Facility Planning & other directors to ensure DIFR budget figures were at appropriate levels. The Budget Director attended meetings with the Res Hall Director and Facility personnel to make sure the maintenance and building needs were being addressed. The Budget Director also participated in meetings run by Young and Wright Architect and made recommendations for funding future capital projects.

The Budget Director offered significant assistance in writing the Middle States supplemental report for the Commission on Higher Education regarding inquires of Fredonia's financial health.

The Budget Office continued to include updates on the budget status throughout the year to various constituents including Planning and Budget, College Council and Cabinet. Yearend budget results were posted on the Budget website.

The Budget Director worked in conjunction with the President's Cabinet and SUNY System administration to provide updates to the Deficit Reduction Plan (DRP) and attended numerous zoom meetings regarding the Plan.

The Budget Director served on the Strategic Planning Committee. The committee met weekly throughout the year after developing the [True Blue Transformation](#), the Strategic Plan for SUNY Fredonia for 2023-2028. Committee members were also appointed to further serve on the Strategic Plan Oversight Team (SPOT). SPOT was charged with facilitating the implementation of the Strategic Plan in collaboration with teams of faculty, staff, and administrators from the five campus divisions (Academic Affairs, Student Affairs, Enrollment Management Services, Finance and Administration, and Advancement) as well as the President's Office. The SPOT members collaborated and created a [Strategic Plan Implementation Toolkit](#). The toolkit site was created in order to provide resources for those divisional implementation teams. Components of the toolkit site include an implementation timeline, resource pages for each of the five goals of the Strategic Plan as well as resources for creating missions, visions, and values, training resources, assessment resources, templates, and (when they are ready) dashboards to track implementation progress.

All divisions successfully were able to create mission statements and create goals for their areas in regards to the Strategic Plan.

The Budget Office continued to monitor an outstanding FEMA claim submitted for COVID related pooled testing costs totaling \$1,640,115.

The Budget Office worked in conjunction with Human Resources and Payroll to determine new adjunct rates of pay and calculate retro amounts due based on newly ratified UUP contract. This took a significant amount of work.

The Budget Office coordinated year-end closing processes and successfully utilized all available state allocation. The Budget Office did a series of 15 Financial Plan moves throughout year as well as moving expenditures to utilize lapsed IFR appropriation. The budget office also set up a new IFR account to start tracking any unfunded state deficits that will eventually need to be covered by cash.

The Budget Office continued to oversee cash accounts and identified available cash sources for funding budget shortfall accounts throughout 2023-2024 as well as reconcile the cash needed to support the state allotted allocation for the year.

The Budget Office successfully verified the Discretionary Salary Pool and helped oversee the Discretionary Salary Increase awards process.

The Budget Office continued to be a support for all areas in regards to running several information reports on Business Intelligence (BI), establishing new accounts and implementing new account structures for divisional reorganizations.

The Budget Director continued to serve on the Information Technology Advisory Board (ITAB), as well as the Strategic Planning Steering & SPOT committee, as previously mentioned.

Assessment Goals

- Complete a condensed version of the 2024-2025 Consolidated University Operating Budget.
- Successfully complete the 2024-2025 Form 1 and related Campus Financial Management Strategies Summaries. The Budget Office will act as a liaison with SUNY System Administration regarding the financial condition, including cash balances of Fredonia.
- Continue to enhance the Budget Office website to incorporate campus wide budgetary documents to keep the campus community informed of budget actions and results. This is to meet the campus' expectation of budget transparency.
- Maintain a three year to five-year budget forecast.
- Work with the President and Cabinet members to identify any budgetary actions and possible cost saving measures or revenue opportunities for the University. Work collaboratively to utilize this system as a potential alternative or augmentation to the current COS system.

- Continue to collaborate with SUNY System Administration and various SUNY campuses to identify and implement “Best Practices” for fiscal operations.
- Continue to evaluate and enhance any existing budgetary procedures or spreadsheets in order to provide information in a more effective and time saving manner.
- Provide ad-hoc analysis to campus constituents in a timely, responsive manner.
- Assist as needed on the Middle States commission on Higher Education Supplemental Report on Fredonia’s financial health.
- Work in conjunction with the new Vice President for Finance and Administration in preparing the budget outlook and cash reserves, as well as other financial documents as needed for the University.
- The Budget Office will continue to work in conjunction with Young and Wright Architects, Residence Hall & Facilities staff to present feasible funding options for any proposed Residence Hall Capital plan projects.
- The Budget Director will continue to serve on the Information Technology Advisory Board (ITAB), and the Campus’s Strategic Plan Oversight Team (SPOT) as well as serve on the search committee for the new Vice President for Finance and Administration. Continue to participate on SUNY’s Pooled Offset Taskforce group to make recommendations on revising the current Pooled Offset distribution across SUNY campuses.
- Work in conjunction with Finance and Administration personnel in year-end closing procedures.
- Oversee Cash Reserves and Budget shortfall accounts.
- Verify & freeze the Discretionary Salary Increase (DSI) Pool, verify salaries, develop divisional DSI Salary Pools, and offer temporary assistance to Human Resources department to help in the UUP DSI awards process during a staffing shortage. This is not to be a permanent commitment.
- Work in conjunction with Human Resources and Payroll staff to determine new adjunct rates of pay outlined in the new UUP Contract.
- Work in conjunction with the President’s Cabinet and SUNY System administration to provide updates to the Deficit Reduction Plan (DRP). Travel to Albany in early September to assist in the plan presentation to the Chancellor and his designees.
- The Budget Office will continue to monitor the FEMA submission related to pool testing costs incurred during the COVID-19 pandemic.
- The Budget office will continue track all new monies awarded to SUNY Fredonia. These include all ongoing initiatives for specific activates totaling \$720,400 as well as one-time monies provided for the Accelerate, Complete, and Engage (ACE) program totaling \$960,000, as well as other grant and Fredonia College Foundation funded initiatives.
- Develop a new account structure due to the reorganization of the School of Music.
- Transition the UBIT & CFRP reports to the Accounts Payable Analyst.
- The Budget Office will work with the new Vice President of Finance and Administration to get them up to speed on the current budgetary processes. The Budget Office will also work in conjunction with the VP and other members of F&A for a possible reorganization of the department due to the retirement of the current Budget Director. The Director of Accounting will assume the responsibilities of the Budget Office in the Interim.

Payroll Services

Annual Report

The primary responsibility of the Payroll Services Office is to affect accurate and timely payment of salaries and wages to all faculty, staff and students who are paid from State Purpose Funds, Income Fund Reimbursable Funds (IFR), Dormitory Income Fund Reimbursable Funds (DIFR), State University Tuition Reimbursable Funds (SUTRA) or College Work Study Funds. Salaries and wages also include miscellaneous items such as overtime, inconvenience and holiday pay, lump sum payments and compensation for extra service, winter session (J-term), and summer session. To affect these payments on the regular State Payroll, Payroll Services is responsible for checking accuracy of information on the Change of Status (COS) form such as salary, pay basis, position title, FTE percentage, and appointment type for all state and graduate assistant employment. For Student Assistant and College Work Study, the Payroll Office is responsible for all appointment and newhire paper work, verifying accuracy and entry, establishing vacant lines for appointment, monitoring appropriate rate increases and over-the-max rates, and processing retirement enrollment for student employees. The role of the Payroll Office actually begins prior to hire, continues in a variety of ways throughout employment and often continues even after separation from payroll due to resignation, retirement, graduation, etc. The Payroll Office functions require interpretation of contract language, time and attendance rules, payroll bulletins, and federal, State and SUNY policies.



*Seated: Kathy Holland; in back from left to right:
Sue Cortes and Tammi Moloney*

In addition to the biweekly preparation of four payrolls, the Payroll Office provides the following services for employees:

- Assists with the completion of payroll related employment forms, such as tax withholding, payroll deduction and direct deposit.
- Completes employment verification requests for unemployment insurance and loan requests.
- Offers assistance regarding payroll procedures and schedules.
- Prepares College Work Study reconciliation which is used by Financial Aid to complete the Fiscal Operations Report and Application (FISAP).
- Administers Time and Attendance rules, procedures, and attendance records for all faculty, professional, Management/Confidential, and classified employees.

The Payroll Office is staffed with a Director, a Payroll Examiner 2 and an Office Assistant 2. Student temporary service and work study also provide assistance. With the retirement of the previous Payroll Examiner 2 in July 2021, we were able to promote the previous Payroll Examiner 1, but are not able to backfill the Payroll Examiner 1.

Accomplishments

- Produced biweekly payrolls for State and Graduate Assistant payees totaling \$43,109,536. This resulted in 1678 paychecks and 18,256 direct deposit advices. There were also 5714 miscellaneous payment entries (Overtime, overtime meals, inconvenience pay, pre-shift, holiday pay, hourly time entries).
- Produced biweekly payrolls for Student Assistant and College Work Study payees totaling \$1,346,298. This resulted in 238 paychecks and 7189 direct deposit advices. For both student payrolls, we also complete the pieces of line item set-up, new hire paperwork completion, personal data gathering and entry, and transaction entry. For the State and Graduate Assistants, these functions are performed by Human Resources with information rolling to our payroll system.
- Contributed payroll and time and attendance information for New Hire Orientations for new faculty.
- Processed 2,234 COS forms for campus payroll transactions for State and graduate assistant employees. This involves verification and supply of appropriate title, effective dates, salary, pay basis and position edits needed as a result of changes. All campus appointments, terminations, and changes in status are routed through Payroll Services for State and Grad Assistant employees.
- Processed the New York State minimum wage increases to all Student Assistant and College Work Study employees.
- Continued maintenance of the COS system by managing user, department, hierarchy, and coding changes for this campus-wide application.
- For time and attendance purposes, the number of FMLA cases and the need for greater monitoring of leaves approved from Human Resources, requires a great deal of tracking and follow-up time. Payroll continues to monitor for COS completion, transaction entry into SUNY HR, and accurate time record completion. Payroll also provides verification the employee has met the required number of worked hours for eligibility. Continued administering all time and attendance policies for all faculty and staff, including the monitoring of timely submission of records. In this reporting year, 99 FMLA cases were tracked.
- Set and communicated the pay periods to be used for Summer Session, J-term, Fall and Spring Adjuncts, Graduate Assistants, and Student Teacher Supervisors
- Assisted Budget Director with the roster to pay the UUP \$400 Discretionary Base increase, helping to determine eligibility and pro-rated amounts. Audited the 736 rows on the file upload roster to go to OSC.
- Calculated and wrote up 489 salary rows, with proper coding, to be manually entered for the adjunct and part-time employees to generate their 2022 2% retroactive and 2023 3% retroactive UUP salary increases. Assisted Budget Director with some of the adjunct eligibility and calculation needed in order for these salary rows to be written up. Audited each row once it was entered by HR to ensure accuracy for file upload to the employee's salary record. Responded to inquiries from OSC on any of our submissions, as well as anything their automatic programming did for full-time employees.
- Audited the Management Confidential 2023 retroactive 3% salary increase and 2023 1% retroactive discretionary increases as prepared by Human Resources and the President's office

- Audited current employee reports to ensure Adjuncts not returning for Spring semester were removed from payroll on time, as well as all Adjuncts and part-time employees whose appointments ended at the end of the Spring semester. This is done each and every semester to ensure no one stays on payroll in error, causing an overpayment.
- Processed 170 J-term and Summer Session COS forms, calculated their payment amounts and any updated amounts due to load changes, audited the entries by HR to the system, audited the payment reports.
- Continued the promotion of the Direct Deposit program to our Student Assistant and College Work Study employees, especially with OSC mailing paper checks directly to the home address. Continued to aid with sign-up resulting in student assistant and work study direct deposit enrollment at 96% for Fall 2023, and 98% for Spring 2024.
- Continued the promotion of the Employee Retirement System to our student employees, in particular those anticipating further state service employment. This allows registration into the current retirement tier with service credit that will not need to be “bought back” at a later time in state employment. In this reporting year, approximately 74 student employees were registered into the Employee Retirement System (ERS) for Fall 2023 and Spring 2024.
- Worked with the Assistant Director of Residence Life to coordinate the pay periods in which to pay the Resident Assistant stipends and coordinate their appointment paperwork so that they could all be paid timely and accurately.
- Continued auditing and tracking of all Extra Service payments to ensure full-time employees are under the 20% of salary maximum rule. Ensured payments were entered and paid correctly to the COS extra service form.
- Served on Search Committee for Director of Accounting.
- Covid leave (Precautionary and Mandatory Quarantine) was still occurring. Payroll continued to have to advise, monitor, and track that transactions and time records happened correctly and that we were provided with the correct information we need from other offices to ensure attendance and payroll was accurate. Approximately 78 employees have needed Covid Leave tracking in this timeframe. These were new instances of tracking needed, however, when an employee is working remotely during a Covid leave, that is not being tracked since it is not being indicated on the time record.
- After working with ITS last year to set up scanning inactive student employment files to OnBase in order to digitize these records from the 9th floor, significant progress has been made as time has allowed. Inactive records through the letter “K” have been digitized. This is the equivalent of 4 full 5-drawer file cabinets, which are now emptied. This is an ongoing project and when complete, we will move to our active files.

Statistical Data

As a measure of accuracy in processing payrolls, our office previously had access to OSC reports on late terminations and late hires. Unfortunately, these reports are no longer available to show statistical improvement or decline in our numbers. We used this information to show the significant impact on the resulting overpayment that a late separation creates, and the actions necessary for our office to recoup the overpayment. The number of late hires also creates additional workload for manual entries of retro pay, not to mention the detrimental impact on the employee hired late due to a late COS. It is a constant goal to see this reduced with each reporting year. Late hires result from a delay in a campus department submitting a COS in a timely manner, or a new employee not completing their new hire paperwork in time for appointment in the appropriate effective dated payroll period. This affects the amount of retroactive pay that is required to be calculated and submitted to the State Comptroller's Office manually by the Payroll Office.

Corrective measures continue to be taken to ensure departments are aware of, and adhere to the COS submission deadlines for timely processing of appointments, separations, and salary changes. COS forms received late directly affect the performance measures of separations, appointments, and overpayments. The Payroll Director regularly communicates the Fredonia COS deadline schedule to all departments and COS initiators to ensure timely submission of COS forms in order to have on-time hires and separations for our employees. Reminders to individual COS users continue to be increasingly necessary to move forms along in order to try to pay our employees on time.

Early payroll deadlines are also communicated to student employee supervisors, and to key areas for timesheet submissions (Facilities Services and University Police), for timesheets which may contain overtime for payment.

A new method of capturing statistical data on late hires and late terminations will need to be found. This can't be tracked manually, unfortunately, due to our deadlines and priority for meeting those in order to pay people correctly.

Assessment Update

Assessment Statement

The Payroll Services unit provides accurate and timely payment of salaries and wages to all faculty, staff and students, and provides excellent customer service to all constituencies. Additionally, we administer all time and attendance functions, rules, and monitoring.

Assessment Activities

The Payroll Services unit designed and delivered payroll and time and attendance information for New Faculty Orientation, with reported positive feedback.

Communication of COS deadlines to campus departments in order to avoid late appointments, late terms, etc.... which create overpayment or late payment situations and affect our SUNY report card results on these items.

Assess the number of new direct deposit records to monitor our efforts to push the Direct Deposit program, and the subsequent marketing and use of the Self Service tools available.

Assessment Goals

- Accurately process payrolls for faculty, staff and students.
- Continue assisting our state and student employees via our accessibility and willingness to help, being available to stop in with a form, with a question, etc..., without the need for an appointment. Also continue our customer service by trying to seek answers for them when they aren't being assisted by others.
- Continue to provide training information and formalize feedback as to the effectiveness of the material presented and available.
- Continue to provide payroll and time and attendance information for new hire orientations and review feedback to improve the effectiveness of the orientations.
- Continue to assist each new student hire with their new hire paperwork (tax forms, I-9, retirement, and direct deposit); then process those payroll items as well.
- Strive to improve upon our late hires and post deadline submissions rankings by continuing to provide COS users with forthcoming processing deadlines. Extra reminders prior to larger payrolls at the beginning of each semester are provided to all COS users, and as we monitor and see stalled COS forms in the workflow.
- Continue the COS administrative duties to meet the needs of the end users and comply with System Administration modifications. Work in collaboration with IT staff to implement recommendations.
- Continue to promote the Direct Deposit program and increase our student and state enrollment in direct deposit.
- Continue the promotion of the ERS Retirement system to our students upon hire.
- Continue the proactive handling of student payroll processes by reaching out to the students and their supervisors when they are missing pieces of their new hire paperwork, with the goal of more timely appointments to payroll. Often their supervisors give their students inaccurate information on what they need to do, what documents they need, etc.
- Continue additional audit measures for greater checks and balances for Direct Deposit, tax withholding, and paycheck deduction entries.
- Increase and continue fraud prevention measures and awareness of payroll staff as new schemes and attempts at fraudulent requests are increasing for campus payroll offices.
- Continue the promotion of the self-service features of the SUNY HR portal and the NYS Payroll online option for W-2 reprints, Direct Deposit stub printing opt-out, W-2 printing opt-out, tax changes, etc.
- Remain abreast of continually changing federal, State and SUNY policies to ensure continued compliance with applicable rules and regulations.
- Continue tracking and monitoring the proper coding and transactions for Quarantine leaves *under the updated and more limiting interpretation by SUNY HR offices* for state employees regular and student) as they have a direct effect on Payroll and Time and Attendance with regard to use of accruals, paid or unpaid status, etc.
- Continue to find ways to streamline processes and procedures, especially given the reduced staffing. We have also evaluated processes to find ways to do less printing and production of paper documents, and will continue to improve on this.

Student Accounts

Annual Report

The Student Accounts office is committed to providing efficient, courteous service to the campus community with a friendly staff knowledgeable on federal, State, SUNY and campus regulations and policies. Responsibilities include accurately billing and collecting tuition and fee revenue for every registered student, distributing Federal, State and private financial aid funds to individual student accounts, and appropriately refunding excess aid directly to the student or back into the financial aid program. In addition, Student Accounts disseminates information to the families of our students relevant to the Tax Relief Act of 1997 for the Lifetime Learning and American Opportunity Income Tax Credit, and provides information sessions at Student Orientation Programs.



From left to right: Wendy Decker, Mindy Ostrander, Leslie Briggs, Jennifer Panfil, Angie Astry and Lynn Bowers

Another responsibility of the Student Accounts Office is the timely deposit of funds for all campus accounts - Income Fund Reimbursable (IFR), student and employee vehicle registration, parking violations, and summer athletic and professional camps.

The Student Accounts Office must accurately account for every dollar billed, collected and refunded within the Fredonia University community. The Uniform Revenue Accounting System (URAS), established and monitored by the System Administration University Controller's Office, provides the basis for our campus financial accounting. Revenue distributions and transfers are prepared and transmitted to SUNY System Administration biweekly. Biannual reporting requirements to System Administration include the submission of a Trial Balance, Reconciliation of Fund Balance, Aged Student Accounts Receivable, Reconciliation of Collections, and Collection Fund Reconciliation. Monthly reconciliation of the URAS financial data is prepared to ensure accurate reporting. A reconciliation of Revenue Related to Student Registration is prepared for each academic semester and submitted annually. A reconciliation of the State Depository and State Controlled Disbursement bank accounts is prepared on a monthly basis and an annual Sole Custody Report for State bank accounts is submitted directly to the Office of the State Comptroller.

The Student Accounts Office was staffed with a Director, an Assistant Director, a part-time Revenue Accountant, an Administrative Aide, a full-time Office Assistant 2, and a full-time Administrative Assistant 1.

Significant Accomplishments

- The Student Accounts Office successfully submitted the 1098-T on time, and they were mailed to students prior to the January 31st IRS deadline. The file was also submitted to ECSI in time that the forms could be printed and mailed prior to the increased postage rate taking effect to save us money.
- Veterans Affairs and Post 911 benefit recipients continued to receive their funds in a timely fashion, and we ensured that no duplicative benefits were received by these students.
- Continued to certify TAP in a timely manner and properly certify students utilizing the two different SAP charts, dependent upon when they initially received TAP or if they are an EDP student.
- Throughout the past year, we received 20 international payments through Flywire totaling \$195,826. Additionally, we received 23 Flywire 529 payments totaling \$116,544. International students that have utilized the service have been pleased with the ease of making their international payment.
- As new TouchNet releases update the software system, we keep the office staff abreast of the changes that occur and the new features that are available for usage.
- Throughout the past year, we have worked very closely with IT, the Registrar's Office, Financial Aid, and Academic Advising to continue the administration of Excelsior. We continue to be a part of the evaluation team for Excelsior appeals, and then process approved appeals through HESC. Unfortunately, these take time to process, and follow up is needed to ensure the student receives the award again.
- Working closely with IT and the SICAS Center, we were able to successfully beta test the new enhancements for the Debt Collection Management system. These were updates that the Attorney General's Office had requested and we were able to submit a test file to the Attorney General's Office to ensure that the necessary data was provided and met their needs. Once testing was complete, these enhancements were released to all SICAS member campuses for implementation.
- Successfully terminated Brinks contract without a penalty for early termination.
- All URAS reporting deadlines were met and requirements were satisfied per SUNY System Office review.
- Tested and implemented all relevant patches for the Banner Finance module.
- Reconciled all Grad Assist waivers funding and expenditures so Grad Assistants receive timely waivers, and it comes from the correct accounts.
- Assisted with the continued implementation of TouchNet Marketplace stores, assuring that the financial data being fed into Banner for IFR accounts from the new stores is properly accounted.
- Assisted with reconciling the Direct Loan Program funds to ensure that loan funds are accurately accounted for in the URAS system.
- Continued work on the Banner Procedure Manual for functions of Student Accounts and Revenue Accounting.
- Submitted all monthly Sales Tax returns in a timely manner.
- Continued updating existing Excel spreadsheets that Revenue Accounting uses on a daily, biweekly, monthly, biannually, and yearly basis to increase operations and efficiencies.

Statistical Data

The Student Accounts Office produced over 11,229 bills for the Fall 2023 and Spring 2024 semesters, a decrease of 7.4% from last year. As you can see from the chart below, we continued with the additional bill for the Excelsior students that were not eligible for their Excelsior award at the end of the Spring 2024 semester; these bills were generated both electronically and via paper. The final bills for the Fall and Spring semesters are prepared manually, and no bills are generated for J-Term or Summer sessions; therefore, no statistical data is available. Please refer to the following chart for statistical billing data of all electronic bills.

Fredonia Student Account Bills						
	2021-22		2022-23		2023-24	
	# Bills	Billed Amount	# Bills	Billed Amount	# Bills	Billed Amount
Fall						
Registration	3,674	\$26,203,748.34	3,412	\$26,200,328.03	3,150	\$22,859,657.05
Post Registration	1,597	11,746,218.06	1,541	11,760,615.39	1,453	12,288,358.17
Audit #1	1,010	8,496,661.12	938	800,838.58	905	8,241,967.29
Audit #2	753	6,593,558.79	682	6,094,471.88	585	5,444,541.48
Audit #3	296	3,119,628.52	222	2,040,861.71	211	1,954,837.80
Spring						
Registration	3,273	25,026,644.67	3,034	24,487,801.98	2,814	22,934,208.70
Post Registration	1,019	8,262,460.30	1,007	8,464,001.30	905	7,716,424.23
Audit #1	666	5,500,742.07	607	5,386,294.87	582	5,197,202.97
Audit #2	506	4,372,368.54	463	4,198,751.96	431	3,925,246.77
Audit #3	207	1,975,425.61	165	1,491,155.01	148	1,223,187.28
Excelsior	68	249,354.69	57	631,836.12	45	491,210.69
Total	13,069		12,128		11,229	

There were 744 students subscribing to the Faculty Student Association (FSA) Debit Account for the Fall and Spring semesters with a billable total of \$377,500, representing a .8% decrease in the number of subscribers and a decrease of 1.77% in dollar value. This reduction is a result of having fewer students on campus during the 2023-24 academic year.

The Student Accounts Office billed \$436,199.51 for laboratory and class fees for the 2023-2024 academic year, representing a decrease of 4.75% compared to the prior year.

Direct deposit of refunds directly into bank accounts totaled 3,480 for 5,357,626 a decrease of 14.18% in number and a decrease in 11.85% in dollar value.

A total of 5,399 credit card web payments were processed for a total of \$11,197,968 during 2023-2024. In addition, 1,524 WebCheck transactions were processed in the 2023-2024 year for a total of \$4,274,510. Please refer to the following charts for comparative data.

Web Credit Card Payments

Month	2019-20	2020-21	2021-22	2022-23	2023-24
July	\$600,717.89	\$48,663.52	\$799,443.42	\$794,052.65	\$797,801.12
August	3,306,751.46	3,542,106.67	3,135,002.74	3,137,284.51	2,988,945.62
September	818,113.69	703,050.27	729,690.02	740,951.39	754,083.36
October	798,590.52	578,272.61	757,384.08	780,723.51	705,649.28
November	319,415.76	350,970.20	325,741.33	265,177.39	279,030.05
December	958,988.09	237,003.92	257,325.51	191,524.16	161,670.55
January	2,794,150.88	2,961,739.59	3,392,807.67	3,492,626.45	3,427,023.37
February	710,992.10	745,509.20	562,239.83	728,153.75	584,328.41
March	535,554.88	607,217.74	618,780.29	612,012.80	569,268.18
April	378,631.64	433,600.86	261,923.82	209,790.12	260,378.65
May	64,050.84	413,185.72	490,360.22	481,424.89	513,305.60
June	94,479.52	209,186.07	124,924.07	145,057.24	156,484.18
Total	\$11,380,437.27	\$10,830,506.37	\$11,455,623.00	\$11,578,778.86	\$11,197,968.37
Net Increase/Decrease		-4.83%	5.77%	1.08%	-3.29%

Webcheck Payments

Month	2019-20	2020-21	2021-22	2022-23	2023-24
July	\$250,220.20	\$12,178.50	\$376,096.14	\$312,566.64	\$364,168.98
August	1,303,486.78	1,246,735.20	1,389,443.65	1,451,710.13	1,281,778.56
September	284,192.64	292,708.85	270,863.84	284,873.00	229,968.96
October	270,086.42	252,399.02	244,764.00	278,948.89	228,882.52
November	100,375.02	64,275.94	119,387.03	97,134.73	72,129.49
December	345,944.19	45,459.83	87,689.05	75,828.59	61,730.35
January	1,036,817.96	1,248,545.46	1,524,570.65	1,354,863.43	1,371,368.51
February	213,786.55	208,937.83	253,064.06	199,289.01	180,143.09
March	238,962.01	212,646.11	254,846.08	218,536.01	211,027.73
April	173,025.20	86,641.68	113,398.62	116,118.49	100,127.73
May	92,146.14	96,689.45	130,675.19	112,701.42	147,321.08
June	54,159.09	61,444.88	38,582.25	27,379.13	25,863.28
Total	\$4,363,202.20	\$3,828,662.75	\$4,803,380.56	\$4,529,949.47	\$4,274,510.28
Net Increase/Decrease		-12.25%	25.46%	-5.69%	-5.64%

During the 2023-2024 fiscal year, \$73.2 million of collected revenue and \$18.9 million of cash disbursements were accounted for within the University Revenue Accounting System. These figures represent a 7.62% decrease in collections and a 12.41% decrease in cash disbursements from last year. Please refer to the following chart for comparative data.

CASH COLLECTIONS				
	2022-2023	2023-2024	Change	Percent
Tuition	\$26,722,960	\$24,688,513	-\$2,034,447	-7.61%
College Fee & Student Fees	\$6,412,665	5,935,743	(476,921)	-7.44%
Campus Debit Card	\$377,965	366,827	(11,138)	-2.95%
Residence Hall Rental	\$13,285,058	12,589,399	(695,658)	-5.24%
Food Service	\$8,638,903	8,728,148	89,245	1.03%
IFR Receipts	\$2,156,070	1,931,001	(225,069)	-10.44%
Disbursements	\$21,632,494	18,947,927	(2,684,567)	-12.41%
Total	\$79,226,113	\$73,187,559	-\$6,038,554	-7.62%

Laboratory & Class Fees	457,950	436,200	(21,750)	-4.75%
Direct Deposits \$	6,078,140	5,357,626	(720,514)	-11.85%
Direct Deposits #	4,055	3,480	(575)	-14.18%

Assessment Update

Assessment Statement

The Office of Student Accounts provides efficient, courteous service to the campus community with a friendly staff that is knowledgeable on federal, State, SUNY and campus regulations and policies.

Revenue Accounting strives to submit accurate URAS biannual and annual reports on a timely basis, and transmit revenue distributions on a biweekly basis. There is an ongoing effort to implement automated procedures as they become available, as well as test and implement all new relevant upgrades and patches to increase efficiency in Banner and reduce data entry errors. Diligence is taken in efforts to reconcile bank statements each month, as well as to monitor the monthly statement of charges for bank services.

Assessment Activities

Attempting to remain abreast of continually changing federal, State and SUNY policies, office staff maintained regular attendance at the SUNY Bursar meetings, TouchNet LIVE and other TouchNet presentations, the Banner User Group meetings, and Higher Education Services Corporation training sessions. This office conducted staff meetings to share information and keep all staff up-to-date.

The Student Accounts Office continues to assess holds and notify students in advance of registration for the upcoming semester. Unfortunately, due to staffing reductions, we are no longer able to reach out to students with balances due individually as we used to in an attempt to assist and reduce our accounts receivable.

We continue to work with the campus as a whole to maintain PCI compliance and are active members of the PCI Compliance Committee. Our Self-Assessment questionnaires are submitted during the fall to Elavon.

1098-T forms were successfully sent to students prior to the January 31st deadline and ECSI submitted information to the IRS in a timely manner on our behalf. The forms were also submitted prior to the ECSI deadline so that we did not incur the additional postage increase that was occurring during that time period. We continue to bill after January 1st of the new year for the Spring semester because it simplifies the 1098-T's for our students and their families.

We have worked closely with IT, the Registrar's Office, Academic Advising, and Financial Aid throughout the past year to administer Excelsior at Fredonia. Our group continues to meet on a weekly basis to continue our planning and preparation for notifying students of their ineligibility or potential ineligibility, as well as making sure that we are getting all students paid as soon as possible. This past summer we decertified all students that did not meet their 30 credit hour requirement after the Spring semester and billed those students. Students that were taking credit hours at Fredonia during the Summer Session were kept as pending until after their summer courses were completed and we could either certify or decertify. We continue to process and monitor appeals that are approved since there is usually a lag in processing to get the funds back on the student's account.

Working with International Education, we assess charges and bill any students enrolled in their ESL Program. For each of these students, International Education tells us how much to assess in ESL Tuition, and we calculate how much needs to be assessed in the College Fee and Student Services and Programs Fees. The assessment of the ESL Tuition and Fees is manual and if the student isn't registered for credit bearing courses, an additional eBill must be generated for that population.

Although the Destination to a Dream (D2D) agreement with Jamestown Community College (JCC) has ended, we continue to check in with JCC's Business Office periodically to see if they have received any more payments from delinquent students. We didn't have the opportunity to pull the accounts back yet, but have discussed this with JCC.

The Jewett Hall Rehab Committee is moving forward and during the past year there were meetings with the architects and campus meetings to determine office locations and what is needed inside each office. The Student Accounts Office will be located in a suite with the Financial Aid Office, but is working to ensure that we can remain separate and secure our cash operations.

Unfortunately, we are still waiting on guidance from the Governor's Office and HESC on how to certify and receive funds for the NYS Vaccination Scholarship.

We successfully completed the beta testing for the Debt Collection Management updates with the SICAS Center. We were able to submit a test file to the Attorney General's Office so they could ensure that all processes were working properly.

Successfully terminated our contract with Brinks without the assessment of an early termination fee. Additionally, we have successfully transitioned to University Police escorting a member of Student Accounts to the bank for our deposits. This transition has saved approximately \$4,600 per year.

All 2023-2024 URAS biannual reports, as well as the annual report, were submitted to System Administration prior to the due date using the new URAS web application. Fredonia's designated campus analyst reviewed each report and issued unqualified acceptance letters for all reports as well as the annual report. This is one of the factors contributing to the good reputation that the campus has within System Administration operations, which has permitted us to submit reports biannually instead of quarterly as we had done in previous years.

Revenue distributions were remitted biweekly on time to System Administration throughout the entire fiscal year and all monthly revenue targets were met. Campus departmental accounts were credited with their revenue collections on a timely basis. Dorm revenue collected was submitted to Key Bank per the dorm regulations.

Monitored the M&T Bank monthly bank statement and M&T Bank, American Express and Elavon merchant charges for accuracy.

Reconciled the M&T Bank monthly bank statement to assure bank records and campus records agree and make necessary adjustments as necessary.

All Banner patches and new releases are continually tested to ensure that they work properly when applied in our production database.

Students are being notified more frequently through both email and mail if they have an old uncashed check, and funds are being sent to the Office of the State Comptroller (OSC) and to lenders more frequently as well.

Our records are being reconciled with the Attorney General's records for accuracy as needed.

Graduate Assistantship records are also being reconciled for accuracy throughout the year.

Dormitory funds continue to be sent to NYS Tax and Finance biweekly.

The continued development of TouchNet Marketplace stores for the online collection of a wide variety of payments continues to lead to a drastic increase in the dollar value of electronic receipts. Anticipating an increase in the cost of our banking services, a method for tracking and analyzing monthly credit card merchant charges was previously initiated. Compared to the previous year, merchant charges decreased 1%; charges for all other banking services increased 2% (please refer to the following chart). This information is critical in securing sufficient funding from System Administration to adequately cover our banking services. All bank statements are also reconciled on a monthly basis to assure the bank records agree with the campus records.

Send dormitory funds to NYS Tax and Finance biweekly as well as monitor KeyBank and BNY statements for accuracy.

M&T Bank Invoice Charges Comparison Years 2022-2023 and 2023-2024				
	23/24	22/23	Inc/Dec	Percentage Inc/Dec
July	2,701.41	2,489.31	212.10	9%
August	3,394.14	3,221.53	172.61	5%
September	3,910.22	4,113.21	(202.99)	-5%
October	4,112.73	3,383.85	728.88	22%
November	3,086.75	3,553.93	(467.18)	-13%
December	2,789.32	2,777.05	12.27	0%
January	3,666.94	3,299.93	367.01	11%
February	4,035.65	4,040.00	(4.35)	0%
March	4,765.40	4,561.18	204.22	4%
April	3,347.59	3,492.28	(144.69)	-4%
May	3,418.45	3,021.96	396.49	13%
June	2,367.21	2,684.83	(317.62)	-12%
TOTAL	<u>41,595.81</u>	<u>40,639.06</u>	956.75	2%

Merchant Charges	23/24	22/23	Inc/Dec	Percentage Inc/Dec
Elavon/Key Mer- chant	211,343.35	210,030.30	1,313.05	1%
Amex	<u>23,002.49</u>	<u>26,395.50</u>	<u>(3,393.01)</u>	-13%
TOTAL	<u>234,345.84</u>	<u>236,425.80</u>	(2,079.96)	-1%

Assessment Goal

- Remain abreast of continually changing federal, State and SUNY policies to ensure continued compliance with applicable rules and regulations.
- Continually seek to improve our business practices so as to maintain or reduce our current level of student account receivables.
- As a member of the PCI Compliance Committee, continue working with Campus Guard and IT to assist Student Accounts and the campus community in remaining PCI compliant. Submit Self-Assessment Questionnaires for the campus merchant ID's with Elavon annually.
- Continue to work with IT, the Registrar's Office, Academic Advising and Financial Aid on Excelsior. Continue to fine-tune our process to certify/decertify student and then bill the decertified students in a timely manner.
- Work with International Education to assess charges and bill any students that are enrolled in the ESL Program.
- Continue to track Destination to a Dream students with a balance due with Jamestown Community College. For those students that are still delinquent, we need to pull the accounts back from JCC's collection agency, bill them and send them on to our collection agency.
- Issue 1098-T's in a timely manner.
- Serve as member of the Jewett Hall Rehab Committee as we plan for the future move.
- Work with Financial Aid and HESC to determine how to process and receive funds for students that received the NYS Vaccination Scholarship.
- Transition to assessing International Health Insurance on the student's bill each semester.
- Transition parking duties to University Police.
- Work with IT, TouchNet and Slate technical staff and Admissions to determine the feasibility of processing admissions deposits through Slate.
- Continue monitoring the accuracy and timeliness of the URAS reports as well as sending them through the URAS web application.
- Continue monitoring the accuracy and timeliness of the biweekly revenue distributions.
- Continue monitoring the monthly statement of bank and merchant charges for accuracy.
- Continue reconciling the bank statement on a monthly basis to assure bank records and campus records agree.
- Continue testing all Banner Finance and related Banner Student Modules.
- Continue reconciling our records with the Attorney General's records for accuracy as needed.
- Continue notifying students more frequently for old uncashed checks. Also ensure students being sent to collections don't have uncashed checks.
- Reconcile the Grad Assistantship records for accuracy.
- Send dormitory funds to NYS Tax and Finance biweekly.

University Accounting

Annual Report

All expenditures (other than payroll) incurred by every department on campus are processed for payment by the University Accounting Office and duly accounted for under the State Payment System. These expenses include, but are not limited to, purchases of office supplies and equipment, construction materials, library acquisitions, utilities, travel expenses and reimbursements, honorariums, personal expenses for moving/relocation, and critic teacher stipends. Emphasis is placed on timely payments to vendors to avoid costly interest penalties, and to employees to foster quality working relationships. Billing errors and/or discrepancies are investigated promptly as incurred.

The University Accounting Office administers FREDmart, Business Intelligence and also updates the SUNY-wide EnergyCap software program with Fredonia's monthly utility information which is used for analysis and reporting.

Monthly recharge accounting data is analyzed, tallied and summarized by account code, and input into the Central Accounting system to accurately recharge every department for the dollar value of services consumed. Recharge services include campus Copy Center service, postage, campus printing service, storehouse inventory and State fleet automobile usage.

The University Accounting Office is responsible for updating employee leave status in the Statewide Financial System (SFS). Additionally, the University Accounting Office is responsible for tracking all OTPS expenditures.

During the 2023-2024 fiscal year, the University Accounting Office was staffed by the Director, an Accounts Payable Analyst, and an Office Assistant 2 (calculations).



From left to right: Trenton Lutes and Rachael Coon

Significant Accomplishments

- Accounting records for the fiscal year were completed and closed per System Administration deadlines without any lapsing State funds.
- The Director of University Accounting continues to be a member of the SciQuest/Jaggaer implementation team and is Fredonia's Campus Administrator.
- The Office of the State Comptroller (OSC) continued granting our campus University Accounting Office the ability to delete inaccurate and/or suspended vouchers.
- OSC continued to consider Fredonia as a "low risk" status, which permits the Quick Pay expenditure level to \$999,999.99.
- The University Accounting Office continually updates their webpage with new procedures and forms, providing departments with easy access to the most current information.
- All travel forms and policies were updated to be in PDF format and the travel page was refreshed to be more user friendly.
- The Accounts Payable Analyst completed several travel trainings for the campus community.

Statistical Data

- Throughout the 2023-2024 fiscal year 5,303 State vouchers were processed for payment around \$17 million. Compared to last year, these figures represent a 2.4% increase in the number of State vouchers processed with a 1.7% increase in the dollar value of State voucher payments.
- Accounts Payable processed 660 Honorariums and approved 49 Direct Pay Requisitions.

Throughout the 2023-2024 fiscal year Travel and Non-Employee Travel (NET) Card transactions continued at an expected rate, with Travel Card expenditures at \$53,943 and NET Card expenditures at \$360,898. This represents a 3.5%% decrease in total Travel and NET Card expenditures from 2022-2023.

Assessment Update

Assessment Statement

The University Accounting Office strives to maximize customer satisfaction. Our customers include the vendors from whom the campus community purchases goods and services, as well as the faculty and staff that we service on a daily basis for travel reimbursement and use of the SUNY BI Web accounting application.

Assessment Activities

The University Accounting Office strives to pay our vendors in a timely fashion. Every effort is made to avoid costly interest penalties by processing payments to vendors within 30 days of receiving the merchandise or invoice, whichever is later. If necessary the staff will contact the vendor for shipping information or a copy of the invoice, or the department for verification of receipt of goods or services.

The Central Accounting System, used when inputting voucher payment information, is equipped with edits to aid in the detection of duplicate invoices. Duplicate invoice warnings are immediately researched and resolved. There were no duplicate payments in 2023-2024. There were two Refund of Appropriations both due to payment method issues.

Assessment Goals

- Continue paying vendors in a timely manner to avoid costly interest penalties.
- Continue monitoring for duplicate invoice payments.
- Continue implementing enhancements in the SUNY Jaggaer eProcurement software.
- Continue participation in the SUNY BI and Jaggaer Taskforces.
- Continue training workshops to assist departmental personnel in understanding the budget and accounting systems, and the proper completion of related paperwork.
- Continue adding procedures, forms, training packets, newsletter, and training presentations to the webpage, allowing departments easy access to the most current information.
- Scrutinize the current travel procedure for possible improvements and reduction in paper consumption associated with travel.
- Maintain or improve our rating for timeliness of payments as per the OSC performance report (provided OSC makes the report available again).

University Services

- **Automotive and Fleet Services**
- **Campus Photocopy Services**
- **Central Receiving**
- **Central and Mechanical Storehouses**
- **Contract Services**
- **Mail Services**
- **Park and Ride**
- **Property Control**
- **Purchasing**

UNIVERSITY SERVICES

Introduction

Under the management of its Director, the University Services Department provides general support services to the campus community. These services include, but are not limited to, contract procurement, asset tracking, the receiving of parcels and the campus-wide delivery of supplies. The divisions under the University Services Department included the following offices:

- Campus Photocopy Services
- Central Receiving
- Central Storehouse
- Contract Services
- Mail Services
- Mechanical Storehouse
- Park & Ride
- Property Control



From left to right: Jody Myers and Terry Tzitzis

Mission Statement

University Services has a mission to provide the necessary support services to implement appropriate programs and services which enhances Fredonia's mission of "Fredonia educates, challenges, and inspires students to become skilled, connected, creative, and responsible global citizens and professionals. The university enriches the world through scholarship, artistic expression, community engagement, and entrepreneurship". University Services ensures that all State and SUNY regulations, guidelines and procedures are followed. Each of the areas under University Services strives to achieve the best services possible to faculty and staff to augment their performance and focus on the teaching and learning processes for our students.

In Fredonia's Vision Statement, states "Fredonia prepares graduate students to be engaged and informed citizens of the region and world, through discipline-specific coursework, interdisciplinary collaboration, experiential research and creative activity. The university establishes opportunities for graduate students to connect their academic work and professional aspirations in meaningful ways by networking with faculty, professionals, alumni and peers. The faculty and professional staff help our graduate students strive to meet their highest goals by challenging them to research, write, publish, innovate and teach, becoming lifelong contributors to their communities"; this clearly shows the direct relationship that all of the departments under University Services have between a student's education and the practical experience they gain in a business office. Through Work Study, Student Assistant and Internship programs, University Services proudly provides many students the opportunity to apply the classroom knowledge they have learned at Fredonia in a real business environment.

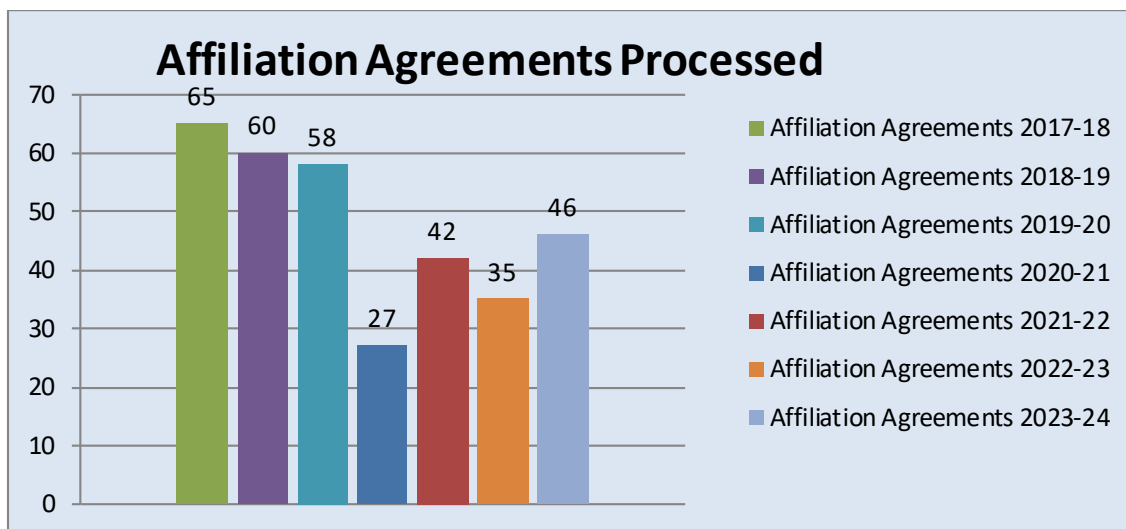
Equally important, University Services has gained from these very students that we are teaching. As a community of learners, we must respect both individual and cultural differences, reminding us that we too have learned so much from our students.

Annual Report

The Director of University Services is responsible for the supervision of the various departments stated previously. The Director University Services is responsible for the advertising, review, approval, implementation, and renewals of many of the University's contracts and services rendered to the campus community. University Services also issues all revocable permits, insurance issues and affiliation agreements of the University. University Services works closely with SUNY System Administration on new policies and State regulations that were issued and signed into law. University Services helps develop and implement new cost saving procedures

Significant Accomplishments

- Prepared and issued bids and contracts for assorted campus-wide services.
- Reviewed and approved 46 affiliation agreements for the campus.
- Miscellaneous bids for services.
- Processed numerous software/miscellaneous agreements.
- Involved in the SUNY initiative of Shared Services.
- Member of the Board of Directors of the SUNY Purchasing Association.
- Served on the Board of Directors as Treasurer for the Upstate New York region of the National Association of Educational Procurement (NAEP).
- Attended the Spring SUNY Purchasing Association Conference, and the Fall Upstate New York NAEP/ SUNY Purchasing Association Conference.
- President of the Board of Directors of the SUNY Fredonia Federal Credit Union.
- Member of the Commencement Committee



Assessment Update

Assessment Statement

The University Services department serves as a resource to all departments on the ever-changing New York State regulations and SUNY policies. The Director of University Services attended all SUNY and campus training sessions held to be able to support the campus in complying with the regulations and policies.

Assessment Activities

- Maintained working relationships with all departments, providing guidance on the changes in policies and procurement rules and regulations.
- Continued working relationships with the Office of State Comptroller (OSC), Attorney General, SUNY System Administration and the SUNY Counsel Office.
- Served on the Western NY Shared Services for cost reductions committee.

Assessment Goals

- Continue working with the Western NY Shared Services group for cost reductions on services and products.

Automotive and Fleet Services

Annual Report

The Automotive and Fleet Services unit is responsible for maintaining the campus fleet of vehicles and motorized equipment. The staff provides mechanical support to over 80 licensed vehicles and 140 unlicensed pieces of motorized equipment including lawn mowers, tractors, backhoes, man-lifts and the Zamboni. This unit is responsible for all repairs, maintenance, painting and annual inspections. The staff is N.Y.S. certified to perform annual vehicle inspections. In addition to maintaining the campus fleet, the staff repairs damaged snow blowers and numerous other equipment. They repair the and respond to fleet vehicle accidents and equipment malfunctions. The unit maintains the gasoline fueling system which provides fuel, using a special code identification system, to all campus vehicles and equipment including the Faculty Student Association (FSA) vehicles. In addition, the unit cleans, fuels, and prepares all fleet vehicle and athletic vehicles used by campus personnel.



From left to right: Jay Jacques, John Schmidt, and Steve Gromala Jr.

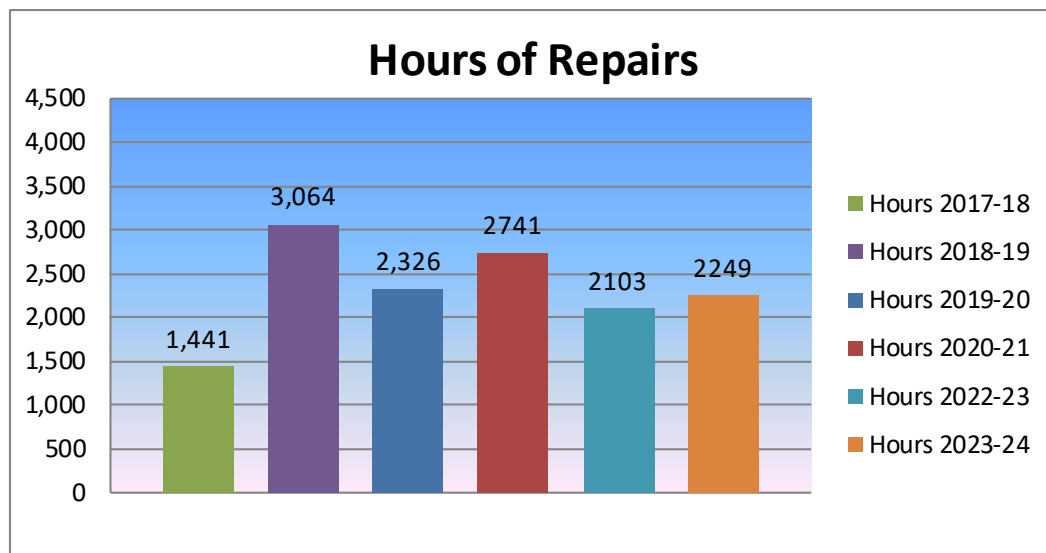
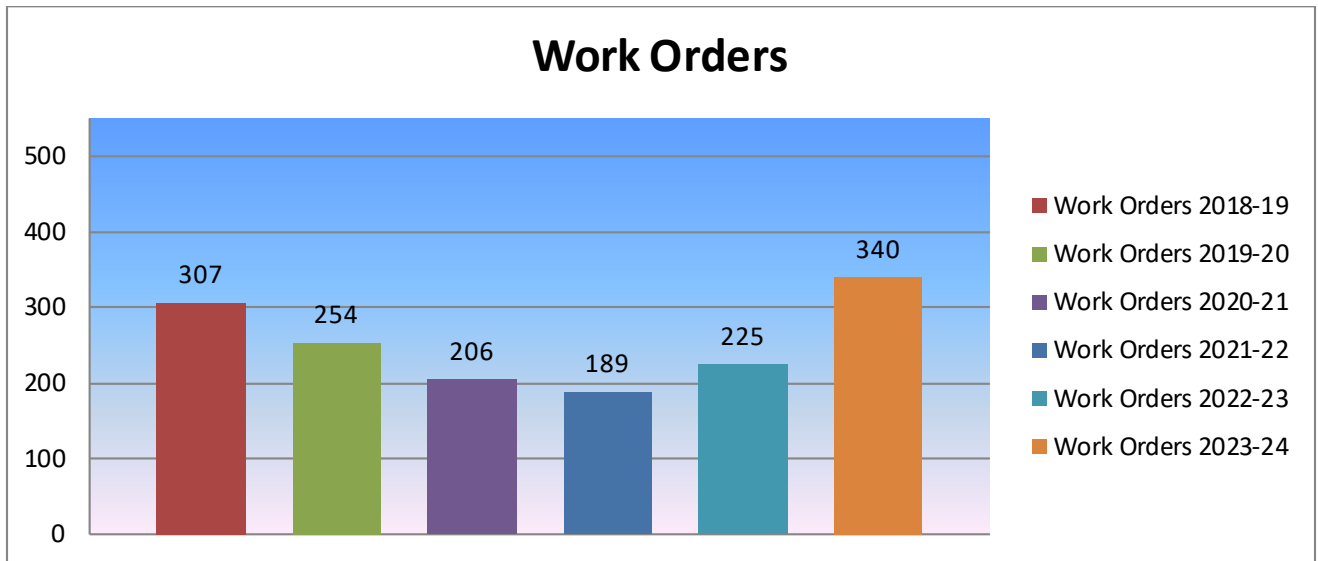
The department is staffed with one Motor Equipment Maintenance Supervisor, one Motor Equipment Mechanic, and one Maintenance Assistant Mechanic.

Significant Accomplishments

- Continuing to train staff on new vehicle repair procedures.
- Completed 340 work order requests.
- Prepared, cleaned and fueled fleet vehicles.
- Responded to various maintenance equipment malfunctions and on-campus building repairs.

Statistical Data

- Completed 340 work and preventive maintenance orders.



Assessment Update

Assessment Statement

The Automotive/Fleet Services unit provides consistent quality customer service to ensure all vehicles and equipment are safe and ready for use while evaluating the equipment and supplies for quality and reliable performance. Delays in equipment repairs was seen because of lack of available parts.

Assessment Activities

- It is standard procedure to observe, review, inspect and monitor staff work while in progress and when completed, to ensure the proper use of materials, equipment and workmanship.
- Ensure that schedules are met, and that the work is performed accordingly.
- Training, instruction and assistance are provided to ensure assignments are completed accurately and efficiently.
- A total of 340 work orders were completed.
- Reduced fleet size.

Assessment Goals

- Continue training on new equipment for servicing and repairs.

Campus Photocopy Services

Annual Report

The Campus Photocopy Services mission is to provide the absolute best value in copying. Our highly creative in-house team is prepared to complete your job. Whether you have a simple black and white copy job, binding job, student packets, etc., this unit will excel in fulfilling your copying needs. There is a total of three photocopy centers situated across campus to meet the needs of our faculty and staff. Their locations are:

- Thompson Hall, Room E357
Main Manned Center
- Thompson Hall, Room W251



Nicole Raynor

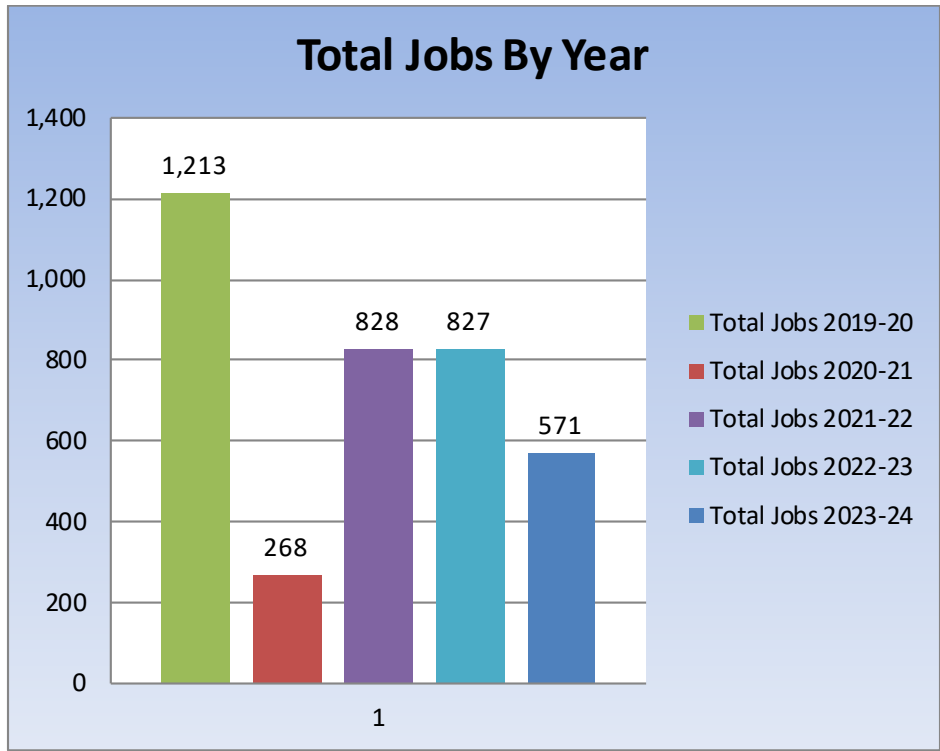
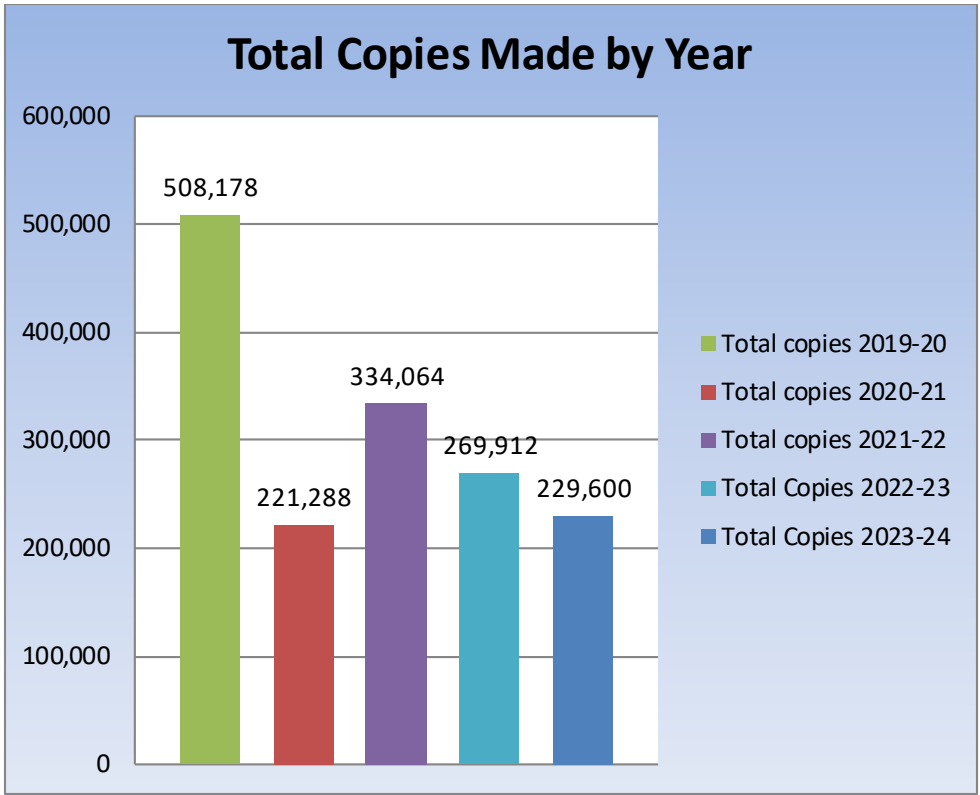
The costs at all centers are tracked to evaluate usage and possible future cost savings. This department was able to maintain the current pricing structure to campus departments at the same cost as in previous years, even though some supply costs have risen. We have continued with the arrangement made with FSA to sell the student packets at the Bookstore.

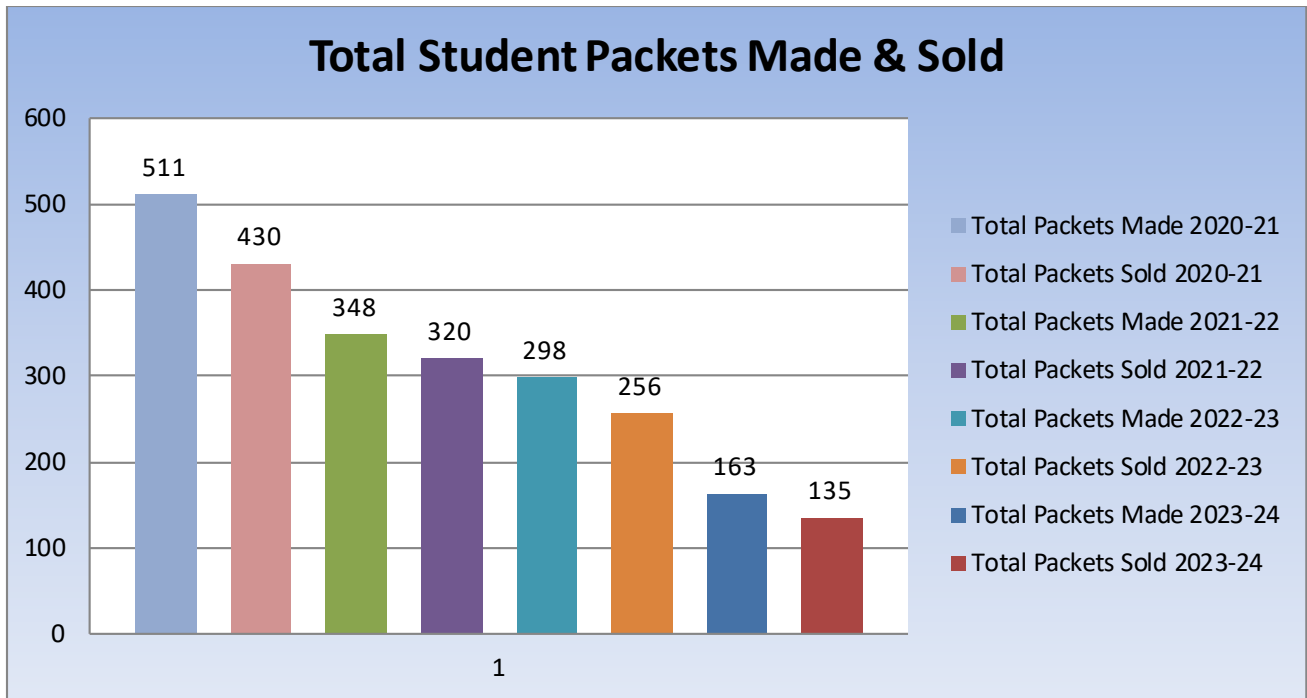
Significant Accomplishments

- Maintained cost to departments at the same level as 2022-2023.
- We continued to combine the supervision of the Copy Center and Mailroom in an effort to maintain low pricing of copies to faculty and staff, while also cutting costs to campus operations.

Statistical Data

- There was a decrease of 15% in photocopies made in 2023-2024 compared to the 2022-2023 year in the Thompson Hall manned center.
- There were 571 jobs with 229,600 copies made at the Thompson Hall copy center in the last year.
- The Copy center in Thompson Hall made 163 student packets, and sold 135 packets this past year. This represents a decrease of 45% in packets made and a decrease of 47% in packets sold from the 2022 – 2023 year.





Assessment Update

Assessment Statement

The Campus Photocopy Services unit provides the most economical photocopying services to departments.

Assessment Activities

- While this department saw an decrease of copies made for the past year, we were still able to keep the price per copy the same for our customers.

Assessment Goals

- Reduce the number of photocopies/cost.

Central Receiving

Annual Report

The daily operations of Central Receiving consist of receiving packages from both on campus and common carrier deliveries, opening, counting, and receiving items to purchase orders. Upon receipt of incoming packages, the packages are opened and checked against open purchase orders, and then signed off on the web based receiving module software. All paperwork is then sent to Accounts Payable to match with invoices and payment in accordance with State procedures. Central Receiving also supplies the campus with truck and personnel for moving furniture, equipment, and large items when needed. University related off campus runs are scheduled and made as needed.

Central Receiving is staffed by one Office Assistant 2 (Stores/Mail).

Significant Accomplishments

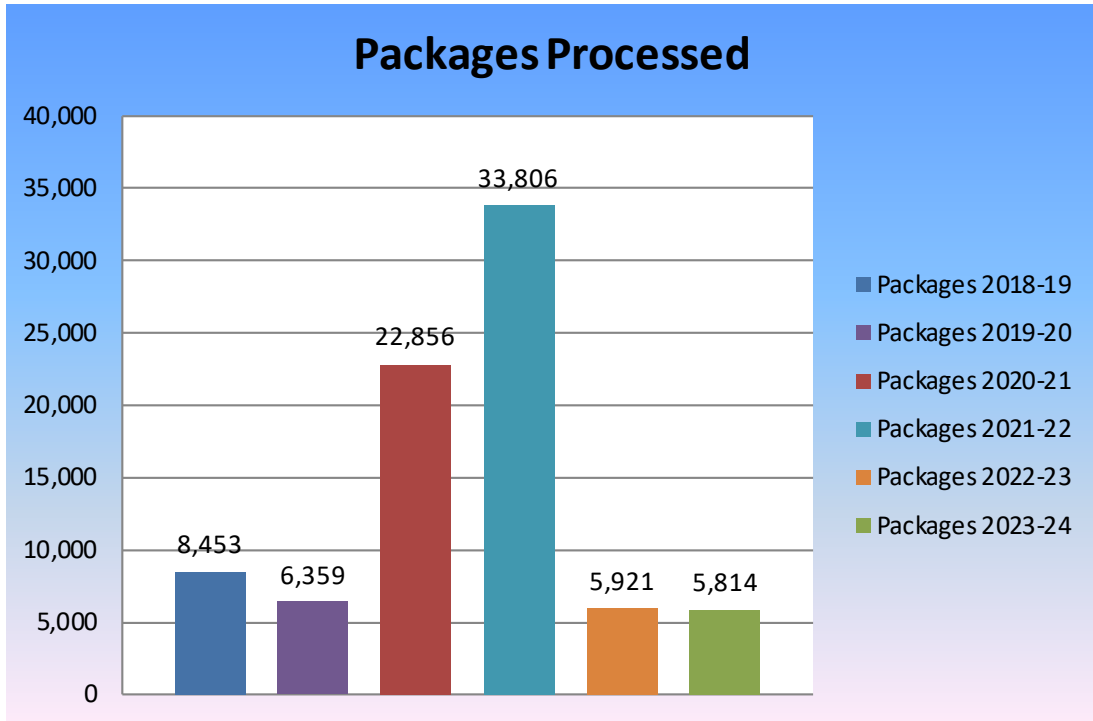
- There were 5,814 packages received.
- There were over 5,299 deliveries received.

Statistical Data

- | | |
|--|-------|
| • UPS packages received: | 2,495 |
| • Federal Express, Ground, Home packages received: | 2,463 |
| • Lasership | 213 |
| • WB Mason | 51 |
| • Miscellaneous deliveries packages | 592 |



Chris Frommer



Assessment Update

Assessment Statement

The Central Receiving unit provides for efficient receiving and delivery of packages for the campus.

Assessment Activities

- Central Receiving is evaluating our receiving/delivery systems to see where efficiencies can be made.

Assessment Goals

- Improve delivery performance.
- Evaluate area for cost reductions.

Central and Mechanical Storehouses

Annual Report

The Central Storehouse consists of custodial and office supplies and is responsible for 326 SKU items with a value of \$211,863 at the end of June 2024. The custodial and office supply inventory dollars increased by 21.6%.

The Mechanical Storehouse is responsible for 2,494 SKU items with a value of \$382,552 at the end of June 2024. Items stored are for use by the trades departments (plumbing, electrical, carpentry, etc.) to make necessary repairs to buildings and equipment. This represents an increase in inventory by 22.6%.

Central Receiving affords the efficient distribution of supplies.

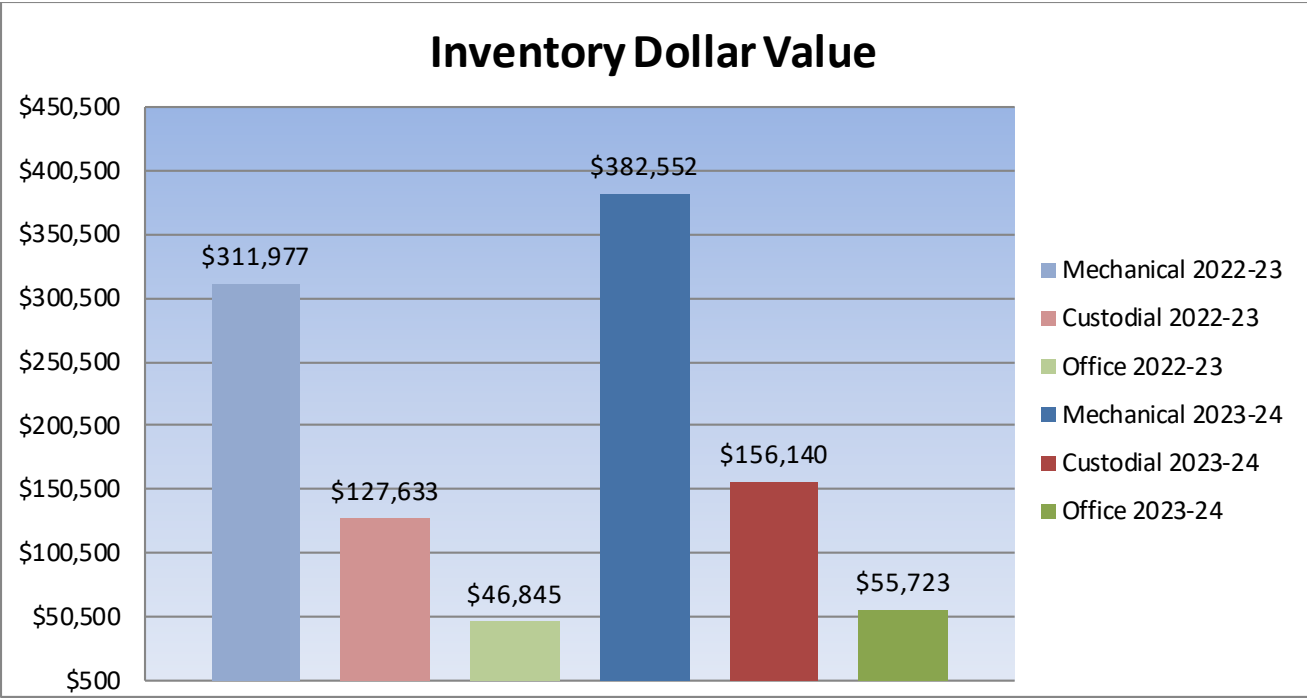
The Central and Mechanical Storehouses are staffed by the Central Receiving personnel.

Significant Accomplishments

- Office supplies inventory items increased over fiscal year 2022-2023 to \$55,723.
- Custodial supplies inventory items increased over fiscal year 2022-2023 to \$156,140.
- Mechanical supplies inventory items increased over fiscal year 2022-2023 to \$382,552.

Statistical Data

- Mechanical supplies inventory: \$382,552
- Custodial supplies inventory: \$156,140
- Office supplies inventory: \$55,723



Assessment Update

Assessment Statement

The Central and Mechanical Storehouse unit provides supplies and repair parts to departments in a cost efficient manner.

Assessment Activities

- This department was not able to reduce some of our inventory of supplies.

Assessment Goals

- Reduce inventories.

Contract Services

Annual Report

The Department of Contract Services was conceived out of the desire to maximize resources and efficiencies in the review and approval of campus contracts in support of and under the direction of the Director of University Services. The office was responsible for the coordination and lawfully compliant administration of various agreements at Fredonia. While few agreements can be reviewed and approved within a 24-hour turnaround time, these are the exception; in these cases, documents only consist of minor or no language issues. Typical agreements can take from one week to over one year to realize full approval by all parties, depending on the size, the complexity, the flexibility of the vendor and other issues. Additionally, working with foreign and out-of-state vendors creates unique barriers to negotiating Fredonia's position and imposing governing laws. Because of the variety and uniqueness of each contract, this department handles multiple priorities at a time where the administration of one overlaps numerous others.

Although some agreements may take an arduous amount of time, which may be of considerable inconvenience to a department, campus staff should be aware of the risks associated with attempting to "push" a purchase through in order to "speed up" the process. By bypassing the approval process and purchasing off of the P-card, by completing click-through agreements downloaded from the internet, or by signing a name to accept a proposal, staff are accepting personal liability and responsibility for that transaction. Fredonia maintains a list of authorized signatures with the Office of the State Comptroller of staff who are authorized to enter into agreements on behalf of Fredonia. Signatures or acceptances by personnel not on that list constitute an invalid agreement with Fredonia. All risks are, therefore, assumed by the unauthorized signer/acceptor. Quite often, the level of risk is not associated to the dollar value of the expenditure. There are many cases where "freebies" and zero dollar value transactions pose considerable risk to the campus and in many cases, additional documentation to complete the procurement record is required. By circumventing the appropriate approval process, staff is circumventing SUNY procurement guidelines which leaves the campus vulnerable to risk and to auditing implications. The Department of Contract Services is working toward full compliance with SUNY requirements and governing laws.

Utilizing a detailed working knowledge of SUNY, New York State, Legal, Purchasing and Procurement, and M/WBE rules and regulations, major responsibilities include:

- Assistance to related departments with workflow process and improvement in order to maintain compliance with governing procurement rules and regulations.
- Education to the campus community on proper protocol for entering into contracts with outside vendors.
- University lead on MWBE compliance and goal requirements as they pertain to procurement opportunities.

The Department of Contract Services is managed the Director, Janet Mayer.

Significant Accomplishments

- Total contract workload is comparative to last fiscal year, however, the majority of contracts this year involved software and services for approvals including boilerplate contracts, while service and software involves unique review and negotiations, sometimes involving the review of multiple documents for one item.
- Held two training sessions for faculty and staff, to educate and assist the campus community with regard to all issues surrounding contracting and procurement on contract procedures.

Statistical Data

Managed agreements for an array of campus-wide services, to include but not be limited to software, and a variety of other services.

Assessment Update

Assessment Statement

The Contract Services Department coordinates and administers the lawfully compliant management of agreements for Fredonia.

Assessment Activities

Staffed by one professional position, this department continued to learn and identify ways to maximize efficiencies and streamline the agreement approval process.

Assessment Goals

- Continue to educate campus community on the importance of obtaining proper approvals on all agreements, and in the acceptance of terms and conditions.
- Continue to educate and assist the campus community with regard to all issues surrounding contracting and procurement, including insurance and procurement record requirements.
- Continue to manage and administer lawfully compliant contracts, agreements and terms and conditions in support of university operations.

Mail Services

Annual Report

Mail Services provides a reliable and efficient mail delivery service to the Fredonia campus community. Departmental duties include the receipt and distribution of incoming mail from the United States Postal Service along with the distribution of intra-campus mail to the administrative and academic departments. Mail Services also collects and processes outgoing mail (including bulk mailings for the departments), providing most services that are available through the local Post Office. In addition to satisfying the faculty and staff mailing needs, the mailroom staff delivers intra-campus mail to the students living in the dormitories, and delivers packages left by Central Receiving.

Mail Services is staffed with one half-time Office Assistant 2 (Mail and Stores) and seven part-time student assistants. The Office Assistant 2 is responsible for the overall operations of the mailroom, student supervision, and departmental recharges. All staff is required to be familiar with United States Postal Regulations and University mailing guidelines. The student staff has the benefit of a valuable learning experience in a fast paced work environment. Among their duties are daily mail deliveries, customer service, and the operation of the postage machine and other office equipment. The student staff is a valuable asset to the department.



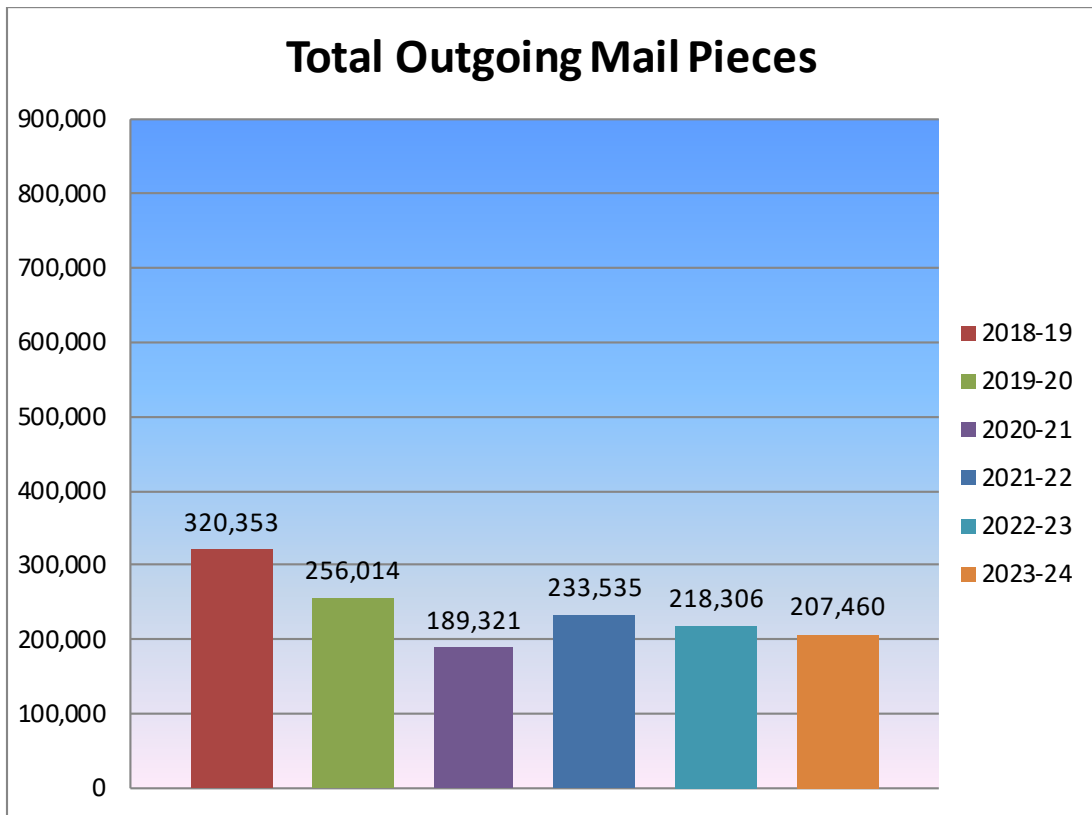
Nicole Raynor

Significant Accomplishments

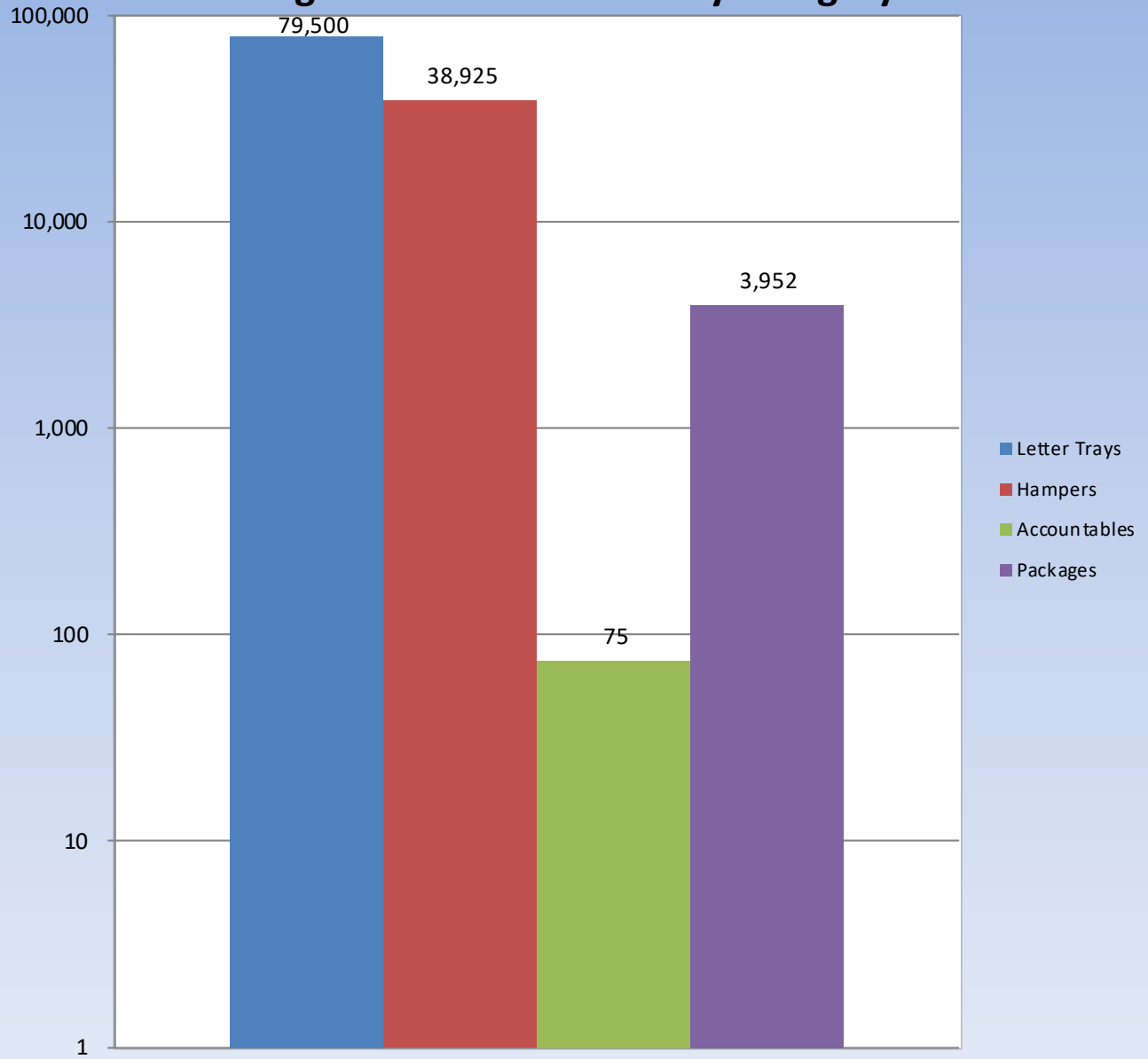
- Deliveries are made to 60 departments and 10 dormitories. 16 departments located in Maytum Hall pick up their own mail from their mailboxes. Delivery routes were altered to accommodate departments moving to different buildings.
- In accordance with Internal Control's Mailroom Security, the annual training session was held. The training covered identifying anonymous mail, postal policies and procedures and an Emergency Response Drill review. A video seminar on mailroom safety produced by the NYS Division of Homeland Security and Emergency Services was shown. The training serves as a refresher for returning staff and informs new employees of the importance of observing potential hazards. In addition to the safety and security topics, many other mailroom rules, regulations and procedures were discussed with an emphasis on sorting mail to the correct department. All Mail Services employees, (state staff and students) are required to attend.
- USPS increased postage rates multiple times throughout the year, which resulted in increased costs for all classes of mail and special services. Priority Mail rates had previously started at \$9.65, and now they start at \$9.85 for a flat-rate envelope. Priority Mail Express Mail had previously started at \$28.75, and now they start at \$30.45 for a flat-rate envelope.

- Postage totaled \$107,440.44 for the fiscal year 2023-2024. This is a increase of 10.01% from 2022-2023.
- There was an increase in the mailings entered through the #367 permit. 2022-2023 was \$27,209.35 and 2023-2024 increased to \$38,150.11.
- There was an decrease in the mailings entered through the #125 permit. 2022-2023 was \$7,435.26 and 2023-2024 decreased to \$6,078.40.
- There was an decrease in BRM and Short Pay usage. 2022-2023 was \$475.57 and 2023-2024 decreased to \$419.97.

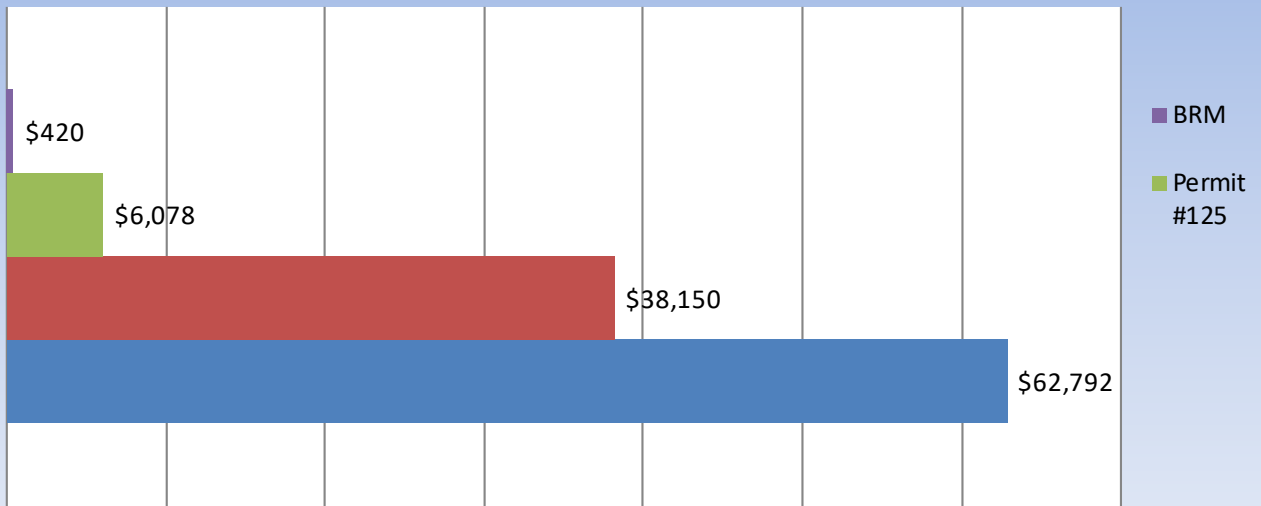
Statistical Data



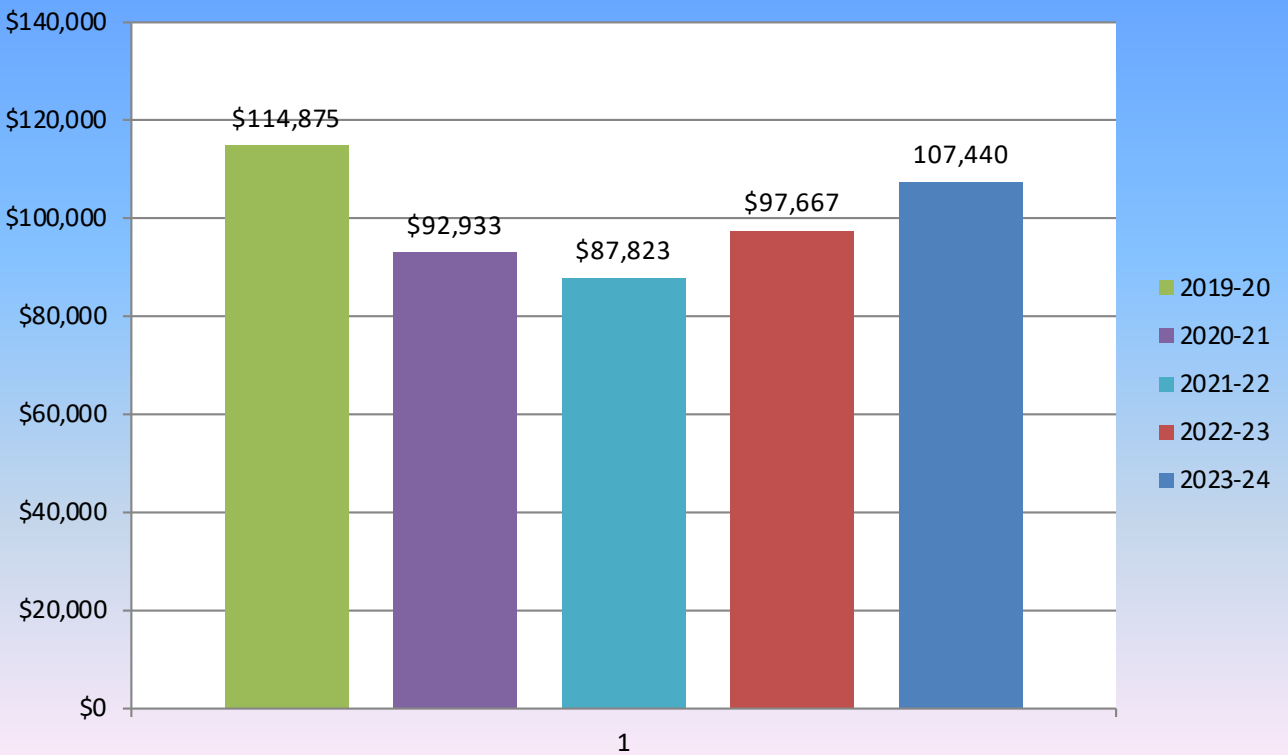
Incoming 2023-24 Mail Pieces by Category



Postage Expense Breakdown 2023-24



Postage Comparison



Assessment Update

Assessment Statement

The Mail Services unit provides departments with up-to-date postal regulations to ensure rapid cost effective mail delivery.

Assessment Activities

Postage totaled \$107,440 for the fiscal year 2023-2024. This is an increase of 10.1% from 2022-2023. The breakdown is as follows:

First Class		\$62,792
BRM/Short pay		\$420
Standard Mail 3 rd Class:		
Fredonia #125	\$6,078	
Buffalo #367	\$38,150	
		\$44,228
	Total	\$107,440

Statistical Averages

Overall, the mailroom processed approximately 207,460 pieces of outgoing mail. This is a combination of first-class mail and standard permit mail. The staff also received, sorted and delivered approximately 122,452 pieces of incoming federal mail and 28,556 pieces of inter-campus mail. In total, the mailroom staff handled about 358,468 pieces of mail this year. On average about 1,440 pieces of mail are handled daily.

Assessment Goals

- Educate campus community on cost saving ideas for mail design and postage.
- Continue to prepare in-house bulk mailings for departments.
- Strive to improve sorting accuracy and to make departmental deliveries promptly and accurately.
- Continue to keep website updated to include correct mail addressing for students, parents and departments. Also add more information on preparing cost effective mail and bulk mailings.
- Offer security and safety training to new student help as needed throughout the year.

Park and Ride

Annual Report

For students, faculty, staff, and guests to the University, Park and Ride has offered a fast, courteous bus shuttle service from the Park and Ride Lot between the Services Complex and the University Village Townhouses, to academic and administrative buildings on campus. Park and Ride is reliable, friendly and free. There was no need to wait in any of the parking lots for a parking space. Students did not have to be late for classes, and faculty and staff did not have to put off running an errand, or worry about the weather.



The Park and Ride Shuttle Service employed three part-time drivers, who all offered a pleasant attitude to start or end your day. Each driver offered a safe and courteous ride.

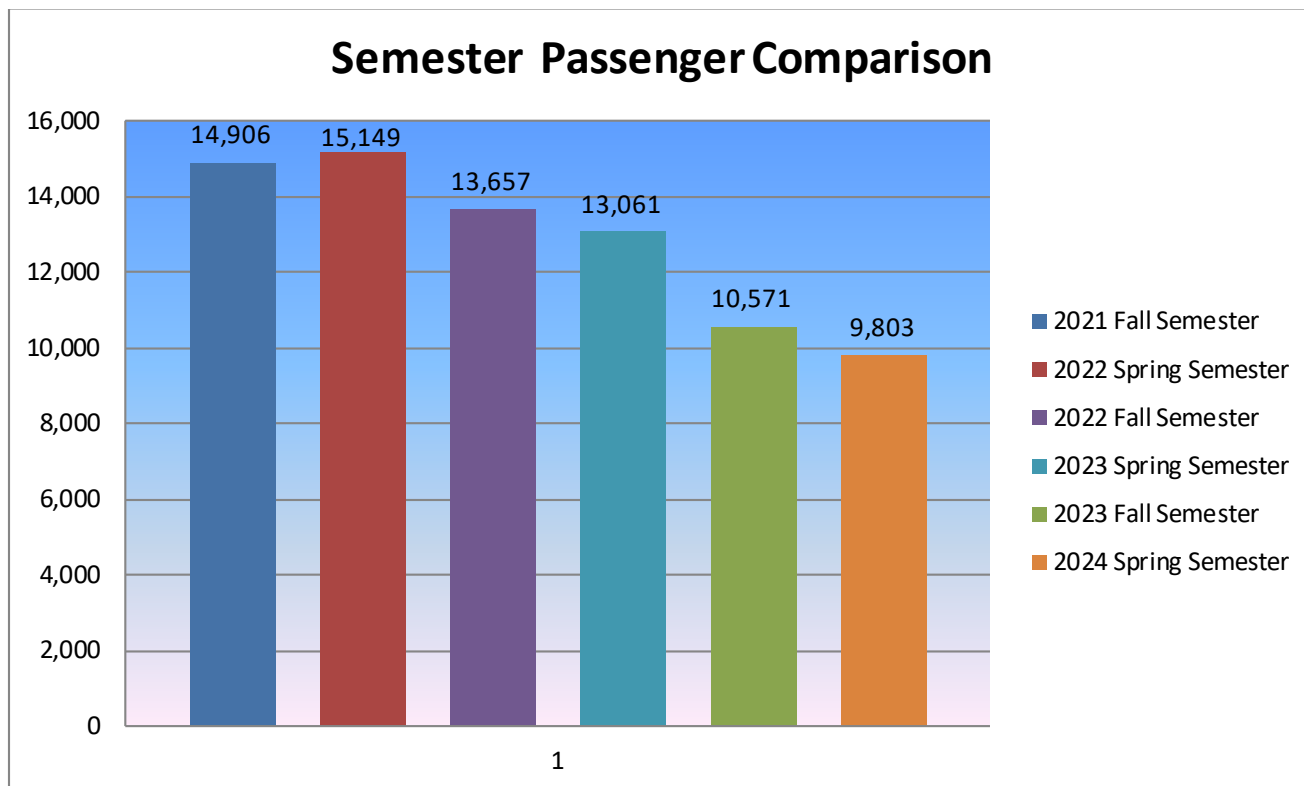
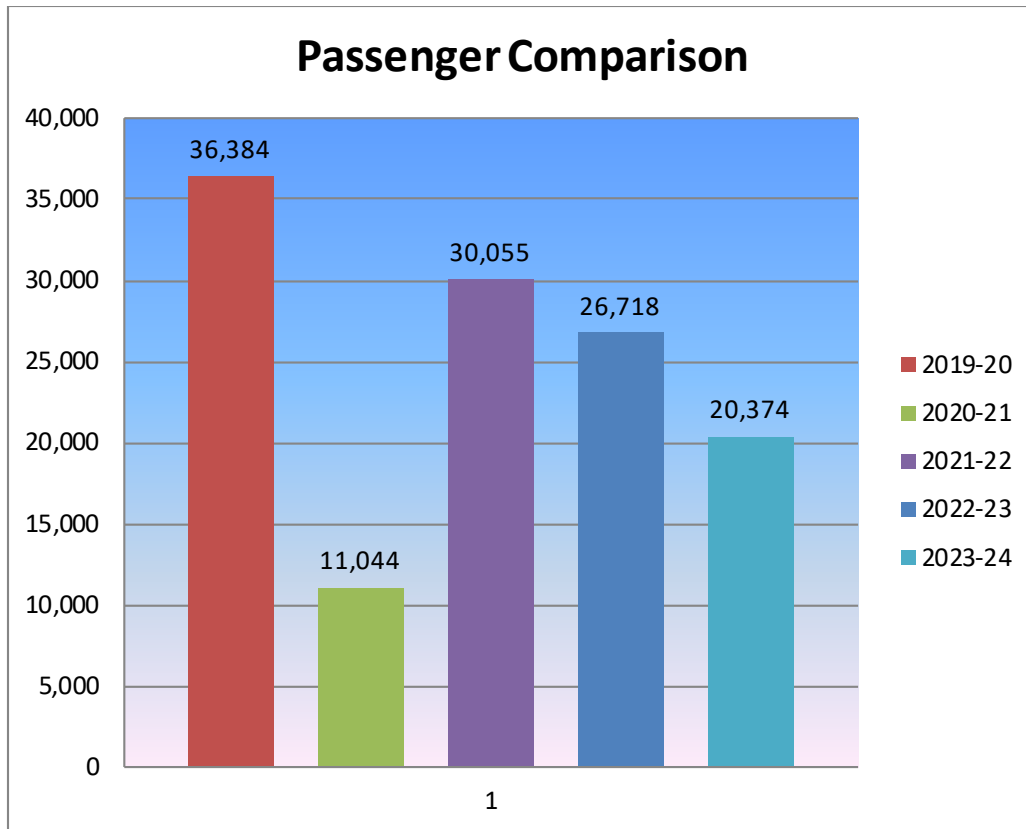
Park and Ride had an increase in ridership this past year with 26,718 passengers.

Significant Accomplishments

This was the 18th year that the shuttle service was offered. Over the last 18 years we have transported 815,043 passengers. Every year we receive many compliments from students and staff thanking us for this service.

Statistical Data

- There were 10,571 passengers serviced for the fall 2023 semester.
- There were 9,803 passengers serviced for the spring 2024 semester.
- A total of 20,374 passengers used the shuttle for 2023-2024.



Assessment Update

Assessment Statement

The Park and Ride Shuttle Service unit provides friendly, free shuttle service for faculty, staff and students.

Assessment Activities

The passenger count shows the reduction usage due to the reduced student enrollment.

Assessment Goals

- Continuation of this service to students, faculty and staff.

Property Control

Annual Report

The Property Control Department is responsible for the administrative policies and procedures of both the State University and The Research Foundation for the complete record and physical inventory of all assets of the University. Property Control is also responsible for the reporting of all missing assets to the appropriate agencies. This includes all assets that are purchased with State, IFR, The Research Foundation and College Foundation funds (all funds).

Property Control oversees the ownership tagging of equipment, usually but not limited to purchases and donations; monitors the movement of state-owned equipment both on and off campus; initiates the surplus process to make usable items available to other State agencies when these items are no longer of use at Fredonia; facilitates the removal and proper disposal of assets that are no longer useful; conducts a yearly physical inventory and reconciliation.



Janet Parsons

The department staff consists of one Office Assistant 3, and one student with good working knowledge of Microsoft Access and Excel. During the months of May through August, student help is recruited for the physical inventory process.

Janet Parsons had retired this past year in April. The position has been vacant waiting for approval to fill the position with assets not being recorded to SUNY as required.

Significant Accomplishments

- Assets: as of July 1, 2023 were 7,724 items totaling \$24,008,898.47.
- New platform (GovDeals) is now being used by the state to list surplus equipment. No equipment has been listed by Fredonia since it began in March 2023.
- Monitored information and forms on Property Control web site to ensure it is up to date.
- Kept the Temporary Loan of Equipment requests information updated and accurate.
- Annual physical inventory of equipment was conducted for 2023-2024.
- Updated Property Control Policies and Procedures

Statistical Data

- 7,724 total assets on inventory for an amount of \$24,008,898.47.

Assessment Update

Assessment Statement

The Property Control department provides accurate inventory of the University's assets, the proper reporting of new assets, and the disposal of retired assets.

Assessment Activities

The Property Control Coordinator had continued, up to her retirement, to update records, files and reports for accuracy.

Assessment Goals

- Fill the position in property control

Purchasing

Annual Report

The Purchasing Department is committed to providing efficient, courteous service to our campus customers. We have a knowledgeable team familiar with federal, State, SUNY and campus regulations and policies.

Responsibilities include accurately reviewing confirming paper requisitions for payment in FMS and reviewing payment requests in FredMart; reviewing and processing standard requisitions into purchase orders, change notices, and when necessary, cancellations in FMS and FredMart; furniture purchases; review of office supply orders with various office supply vendors in FredMart; ensure the best pricing available for all procurements. We input to and obtain vendor information from the State Financial System and FredMart. In the review of requisitions, we provide expertise relevant to contract applicability, cost effectiveness, commodity information and sourcing, negotiations, quoting and re-quoting, and problem solving. We also handle returns of incorrect or damaged goods when purchased via a purchase order. All aspects of the State issued procurement card are managed by the purchasing staff including training, cardholder set up, auditing, reconciling, and troubleshooting



From left to right: Shari Miller and Alicia Klepfer

The Purchasing staff advises departments of procedures for the use of preferred sources such as the Department of Correctional Services (CORCRAFT), New York State Industries for the Disabled (NYSID), New York Preferred Source Program for People Who Are Blind (NYSPSP), Minority Women Business Enterprise (MWBE), and Service Disabled Veteran Owned Businesses (SDVOB). Responsibilities also include ensuring trademark and licensing as well as branding procedures are followed, software and contract services procedures are followed, and information technology procedures are followed; dissemination of information from the Office of General Services (OGS) website for "P" contracts and SUNY wide contracts to the appropriate departments; and assisting in the formal bidding process with bid openings as needed.

The Purchasing Office is staffed with a Director, an Office Assistant 3 (OA3), and one Student Assistant (SA).

Significant Accomplishments

- 76 procurement card holders with 1,803 transactions, totaling \$528,255.70.
- Added/updated multiple vendors in the Statewide Financial System (SFS) and guided multiple vendors to SFS Self Service with information changes.
- Purchasing Department employees attended various conferences and workshops during fiscal year 2023-2024. The Purchasing Department also participated in System Administration webinars and Jag-gaer weekly webex calls.
- 2,512 purchase orders and payment requests were reviewed and approved in FredMart totaling \$9,430,627.
- Purchasing Department staff have a presence in the Fredonia Sustainability Committee, two campus investment clubs, along with various community groups.
- Purchasing Department staff presented at the Finance and Administration Training Day.

Statistical Data

2023-2024 Purchasing PO Volume Report										
Date	Purchase Orders & Payment Requests in FredMart		Change Notices No.	Computer JTs/Voided Requisitions		Paper Requisitions not in FredMart		VISA		Total State Purchases Amount
	No.	Amount		No.	Amount	No.	Amount	No.	Amount	
Jul	214	\$ 956,952.79	40	0	\$ -	4	\$ 1,558.47	143	\$ 53,478.70	\$ 1,011,989.96
Aug	274	\$ 2,745,670.74	59	1	\$ 211.00	4	\$ 353.89	178	\$ 55,181.52	\$ 2,801,417.15
Sep	217	\$ 1,008,012.53	18	0	\$ -	2	\$ 413.85	218	\$ 54,241.97	\$ 1,062,668.35
Oct	210	\$ 623,336.81	4	0	\$ -	6	\$ 1,088.03	139	\$ 42,470.80	\$ 666,895.64
Nov	217	\$ 680,228.00	9	0	\$ -	2	\$ 514.86	117	\$ 29,891.78	\$ 710,634.64
Dec	132	\$ 346,507.81	18	0	\$ -	4	\$ 663.68	122	\$ 42,496.86	\$ 389,668.35
Jan	199	\$ 528,853.34	14	0	\$ -	4	\$ 1,126.55	148	\$ 53,493.11	\$ 583,473.00
Feb	248	\$ 561,975.68	11	0	\$ -	0	\$ -	161	\$ 25,893.05	\$ 587,868.73
Mar	192	\$ 684,698.04	12	0	\$ -	5	\$ 1,042.60	174	\$ 47,047.15	\$ 732,787.79
Apr	262	\$ 639,458.08	21	0	\$ -	9	\$ 4,029.64	152	\$ 30,995.93	\$ 674,483.65
May	277	\$ 508,041.50	29	0	\$ -	13	\$ 3,574.86	142	\$ 47,625.37	\$ 559,241.73
Jun	70	\$ 146,891.84	51	0	\$ -	1	\$ 1,537.50	109	\$ 45,409.46	\$ 193,838.80
Total	2512	\$9,430,627.16	286	1	\$211.00	54	\$15,903.93	1803	\$528,225.70	\$9,974,967.79

Assessment Update

Assessment Statement

The Purchasing Department strives to work with our campus customers and off-campus vendors in an efficient manner to maximize a department's budget dollars while staying in compliance with federal, State, SUNY, and campus policies. Our customers are everyone that attends or works on this campus, or is an off-campus vendor.

Assessment Activities

The Purchasing Department maintains close working relationships with campus departments, vendors, and SUNY System Administration providing instruction, guidance, and analysis in online requisitioning, vendor selection, procurement cards, and office supply procurement.

Training sessions are provided for eprocurement application, and the use and administration of the procurement card to individuals and departments. Upon request, the Purchasing staff is willing to provide departmental training. The Purchasing Department also presents at the annual Finance and Administration training day. Evaluation forms are utilized at these training sessions to assess the necessity and the presentation style, as well as to obtain suggestions for improvements and possible future topics. As a result of this feedback, the Purchasing Office can target areas needing more emphasis at future presentations.

Assessment Goals

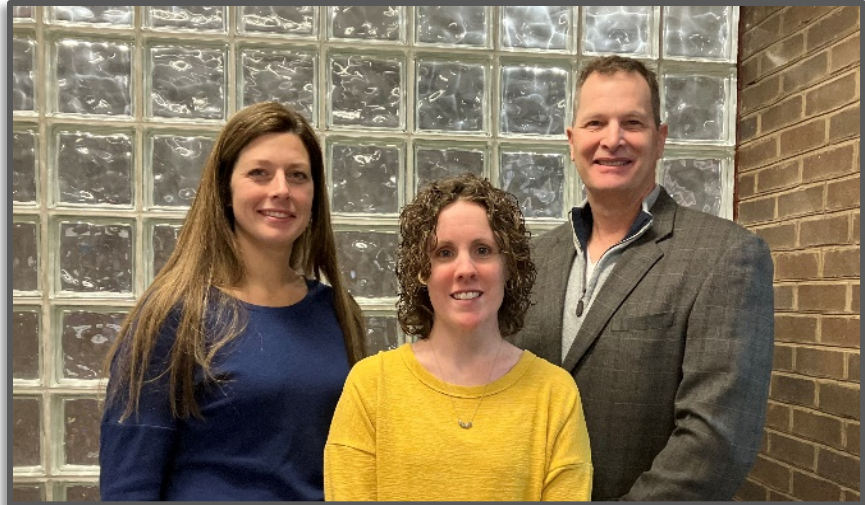
- Continue presenting purchasing workshops to campus clients as time allows.
- Continue working with SUNY System Administration on the Fredonia JP Morgan Chase VISA Procurement Card program and web procurement.
- Update the Purchasing Department webpage and manual as necessary and add new Standard Operating Procedures for departmental reference as time allows.
- Ensure that requisitions are processed in a timely and accurate manner.
- Continue strengthening campus awareness of NYS certified MWBE and SDVOB vendors in an effort to increase their usage.
- Strive to meet SUNY's MWBE goal of 30% for commodities, and the SDVOB set aside goal of 6%.
- Continue strengthening MWBE relationships and developing relationships with New York Certified Service Disabled Veteran Owned Businesses as time allows.

Environmental Health and Safety and Sustainability

ENVIRONMENTAL HEALTH AND SAFETY AND SUSTAINABILITY

Introduction

The Environmental Health & Safety & Sustainability (EH&S&S) department is responsible for campus-wide compliance with Federal, State, and local environmental and occupational safety regulations. The department is also ultimately responsible for fire safety, the NYS Uniform Building and Fire Code, campus environmental sustainability, and emergency planning and preparedness. In addition to compliance issues, EH&S&S is responsible for assessing, designing,



Left to right: Alicia Schneider, Sarah Laurie and Charles Holder

and implementing programs that ensure the safety of the university community. EH&S&S provides guidance, training and support to all divisions on an as needed basis while striving to increase the regulatory awareness of all who live and work on campus. EH&S&S also provides guidance to the campus community on issues of environmental, business, and social sustainability as well as emergency preparedness including developing response plans and providing training to campus groups and departments. EH&S&S is located in Hendrix Hall.

Mission Statement

The mission of the EH&S&S department is to partner with the university campus community in an effort to inform, educate, and provide up-to-date compliance information to provide a safe, compliant and supportive environment in which to foster the learning process. The EH&S&S department integrates sustainability into individual aspects of campus life by improving transportation, increasing environmental awareness and utilizing the campus as a learning/living environment to achieve sustainability. EH&S&S endeavors to provide a secure, viable campus in which members of the college community can explore education and foster safe work practices while sharing in the university experience.

Annual Report

Environmental Health & Safety & Sustainability's responsibilities include ensuring that all federal, state and local regulations with regards to the Environmental Protection Agency (EPA), the Department of Environmental Conservation (DEC), the Department of Labor (DOL) and the Occupational Safety and Health Administration (OSHA) are being met, and thus request and provide internal inspections, employee training and preparation of the campus for inspections by external regulatory agencies. Additionally, the department assists campus administrators, employees, and students to develop sustainable programs that educate the campus community on environmental and social issues, provide a sustainable environment for education, and encourage continued fiscal stability. EH&S&S also drafts campus-wide plans for responding to emergencies.

Specific services provided by the Environmental Health & Safety & Sustainability Department include:

- Assess, design and implement all environmental, workplace safety, and fire safety training for the campus community. Oversee campus environmental regulatory compliance. Issue/review permits as required.
- Conduct fire, AED and workplace safety building inspections per requirements. Provide campus community with CPR/AED and First Aid training.
- Develop a pro-active working relationship with all departments as it relates to safety and regulatory compliance.
- Foster support and ensure compliance as it relates to working with outside contractors on the Fredonia campus.
- Provide support and guidance for environmental and safety related concerns posed by all members of the University.
- Maintain a campus-wide Safety Data Sheet file (SDS Online) for every hazardous material used or stored on campus. Identify waste streams and assure proper disposal methods.
- Provide guidance and oversight in the proper management and disposal of industrial, hazardous, universal, electronic, biological and radiological wastes generated on campus.
- Foster a team approach to working with the varying University departments to ensure chemical security and assist in the management of chemical emergency response.
- Develop, maintain and implement the campus Emergency Response Plan.
- Oversee training and functionality of the campus Incident Management Team as well as other key campus individuals and departments as they pertain to Emergency Response.
- Provide ergonomic workplace assessments and recommendations as requested.
- Provide guidance and direction as requested in relation to NYS Fire Code.
- Monitor and coordinate pesticide application certifications.
- Provide leadership to the Sustainability Committee.
- Provide leadership to the Campus Safety Committee.
- Calculate occupancy and square footage to meet occupancy needs in areas of public assembly on campus.
- Oversee and manage the campus FredRide carpooling program.



- Complete reports for Executive Order 22, NYS Environmental Self-Audit, DERA, CLERY, Part 2014, Annual Hazardous Waste, Pesticide Applicator, Glyphosate Applications, Cooling Tower Inspection, and other required reports.

In fiscal year 2023-2024 Environmental Health & Safety & Sustainability consisted of one full-time Director who maintains general responsibility for the department, reviews and updates campus safety programs and policies, manages all regulated campus waste streams, files required annual reports, provides strategic direction on environmental sustainability issues for the campus, administers the CPR/AED and First Aid training programs, and acts as the campus Code Compliance Officer. A part-time Fire Systems and Codes Coordinator and dedicated student oversee campus fire safety including monthly and annual inspections of fire systems, annual state fire inspection, fire extinguisher trainings, and AED management. A part-time Emergency Planning Coordinator develops a robust campus Emergency Response Program and oversees employee training on emergency planning and response.

Significant Accomplishments

- Inspected, tagged, and serviced over 1,200 fire extinguishers, 855+ pull stations, and 111 AED's located throughout the campus.
- Conducted annual State fire inspection. This inspection encompasses the entire campus and its off-site buildings. The inspection normally takes two and a half weeks to complete. There are additional days for re-inspecting the non-compliance areas. EH&S&S also coordinates with responsible campus departments to ensure all non-compliance issues are abated. Focus of the 2024 inspection was bringing building sprinkler inspections and reports up to enhanced standards.
- Chaired and participated in several campus committees including the campus Sustainability Committee, Radiation Safety, Bon-FYRE Planning Committee, and Campus Safety Committee.
- Completed required safety training for key campus constituencies including Hazard Communication/Right-To-Know training for the Faculty Student Association and Fire Safety training for Residence Life Directors and Assistants.
- Assisted with implementation of EO22 initiatives including Food Recycling, ZEV transition plans, and NYS reforestation.

Assessment Update

Assessment Statement

The Environmental Health & Safety & Sustainability department provides a pro-active, cooperative environment in which employees are able to work and grow. Additionally, the department designs and implements campus compliance and safe work practices in an effort to continue the quality and high level of standards the Fredonia community has come to expect.

EH&S&S continues to assess campus activities to develop and enhance training, chemical tracking, training databases, and sustainability resources that will allow assessment on a periodic basis.

Assessment Activities

- Assisted with campus compliance of new sustainability related regulations including the NYS ZEV transition, single-use plastic ban, and NYS Reforestation initiative.
- Handled the annual NY State Fire Inspection and maintained oversight of citations to ensure timely correction of all issues.

Assessment Goals

- Develop a Babysitting Safety course to add to the Red Cross training available on campus.
- Obtain funding for an On-Site Energy Manager to review energy savings initiatives and goals for the campus in compliance with EO22.
- Roll out campus-wide fire safety training

Facilities Planning

FACILITIES PLANNING

Introduction

The Office of Facilities Planning is a single department responsible for the identification and administration of capital construction and residential rehabilitation projects on campus. Coordination and support is provided to all departments on campus, while frequent interaction with staffs of the SUNY Construction Fund, NYS Dormitory Authority, Office of Capital Facilities, NYS Department of State Division of Code Enforcement, Office of State Comptroller, outside consultants, and contractors remains a fundamental aspect of the successful completion of these major renovations. This office is also responsible for overseeing the campus Capital Plan and works closely with the Vice President for Finance and Administration and the President in developing capital facilities priorities.



From left to right: Markus Kessler, Gretchen Fronczak, and Kenneth Schmitz

Mission Statement

In linking to the College Vision Statement, it is the goal of this department to support this institution's residential and academic programs by providing the campus community with a safe and supportive environment in which to develop their talents, accomplish their goals, and attain the highest standards of excellence possible. We endeavor to provide a setting of well-maintained buildings and grounds in support of this goal, co-curricular activities, and sports that continue to develop leadership and unite participants in pursuit of shared interests.

Annual Report

The Facilities Planning Department is responsible for campus liaison services between the campus and the SUNY Construction Fund, NYS Dormitory Authority, outside consultants and contractors. Bidding and contract administration are conducted, designs reviewed and approved, and construction monitored and managed to ensure regulatory requirements are met on construction activities. This department also administers the Facilities Alteration Guidelines, which requires that all campus construction receive approval at the upper echelon levels and subsequent review by this department, regardless of dollar value. These guidelines ensure sufficient planning and review by all parties prior to construction efforts.

The Facilities Planning Department is also responsible for administering the Fredonia building permit program, which formalizes all project planning and code compliance reviews as well as performing required construction inspections per the NYS Department of State.

This department aggressively pursues the College's mission to provide a "challenging, safe, and supportive educational environment" through its commitment to meet high standards and provide superior quality facilities.

Facilities Planning is comprised of one full-time Director who maintains overall responsibility and direction for the department. This position is also designated as the campus Code Compliance Manager responsible for building code compliance, issuance of building permits, and all code review issues. A full-time Capital Project Assistant provides administration support of construction/consultant contracts, payment applications, certified payroll, vendor review, MWBE review and project site support. A full-time Capital Project Manager (currently vacant) provides technical knowledge during all phases of a project. Both the Director and Capital Project Manager follow designated projects from the initial to end stages and provide all monitoring, management, and coordination required between these stages.

Significant Accomplishments

The 2023-2024 Annual Report for the Facilities Planning Department highlights many accomplishments including:

- Completed the construction document phase of Jewett Hall Renovation Project
- Completed the concept phase of Interior Rehab Reed Library Project
- Completed the construction document phase of Replace Turf Field and Track Project and completed the construction phase of Replace Synthetic Turf Field Breakout Project.
- Completed the Replace Mason Hall Copper Siding project
- Started the design phase for Renovate (old) Mason Hall Project
- Started the design phase for Replace Mechanical Equipment RAC Project
- Started construction of Replace Emergency generator (various Buildings) Project
- Started construction of Replace Kirkland Plaza Project
- Started Fenner House Feasibility Study

1. Academic/Administration/Infrastructure Projects

- Studies and Reports:
 - Fenner House Fesibility Study
- Planning:
 - SUCF Five-Year Capital Plan
 - Updating SUCF Facilities Master Plan – 10 Year out look
- There are no projects in the RFQ phase
- There are 6 project in the design or bid-ready phase
- There is 6 project in the construction phase
- There were 4 project completed during this time period

Capital Projects in RFQ, Design, Bid-Ready or Planning	Capital Projects in Construction	Capital Projects Completed
Renvovate Mason Hall - SOM (design phase)	Maytum/Reed McEwen Plaza Rhab – Substantially Complete	Lanford Rehabilitation Phase I – Interior
Replace Mechanical Equipment RAC (design phase)	MaytumHall Roof Replacement	LoGrasso Hall AHU & Ventilation Upgrade
Landford Rehabilitation Phase II – Exterior (design phase)	Mason Hall Copper Siding Replacement	Upgrade A/C & Humidity Controls - Mason Hall
Intertor Rehab Reed Library (design phase)	Replace TurfField and Track – Breakout Synthatic TurfField	Campus Clean Energy Master Plan
Jewett Hall Renovation (design phase) Construction state date Summer 2025	Kirkland Plaza Rehabilitation	
Replace TurfField and Track – Ring Road Location (design phase) Construction start date Spring 2025	Replace Emergency Generators	
Fenner House (Fesibility Study)		

Academic Major Commissions

- **Jewett Hall**



Student support services at Fredonia are currently located in eight buildings across the campus. As a result, students often travel from building to building looking for the right office or department to assist them. Furthermore, the physical discontinuity creates challenges for student support services to work collaboratively in support of students. Fredonia's initiative, Building Towards Student Success, will centralize student support services in three adjacent buildings, one of which is Jewett Hall. This will form a student success corridor in the heart of the campus.

Constructed in 1963, Jewett Hall was the home for Science Education at Fredonia, and included teaching laboratories, faculty offices cold room facilities, a 200-seat Auditorium, and a Planetarium. The building is 65,539 GSF consisting of one and two-story sections above grade, and one story partially below grade which covers the entire footprint. The project will be a partial gut renovation of the building, leaving the Planetarium and Auditorium in place; both spaces are to be rehabilitated.

The building will receive a new façade. Development of the new facades brought some reduction in the window coverage, particularly in the east and west facades (where the existing building has minimal glazing), while the window coverage in the north and south facades was kept roughly the same as it was in the original to the building. The new window layout allows occupants access to natural light in all of the offices and conference spaces that abut the exterior walls, and will allow, through the glazed office fronts, natural light to penetrate into the open work areas of the suites.

Newly added exterior canopies are light structures offering protection from the elements while also calling greater attention to the building entries, increasing the sense of welcome that the building projects.

Upon completion of the renovation, the building will house Student Services departmental office suites as well as ancillary common spaces: conference rooms, lounges, multipurpose space and classrooms.



Typical Suite Entrance



Typical Suite Service Counter



Exterior View from Old Main Drive

- **Interior Rehab Reed Library**

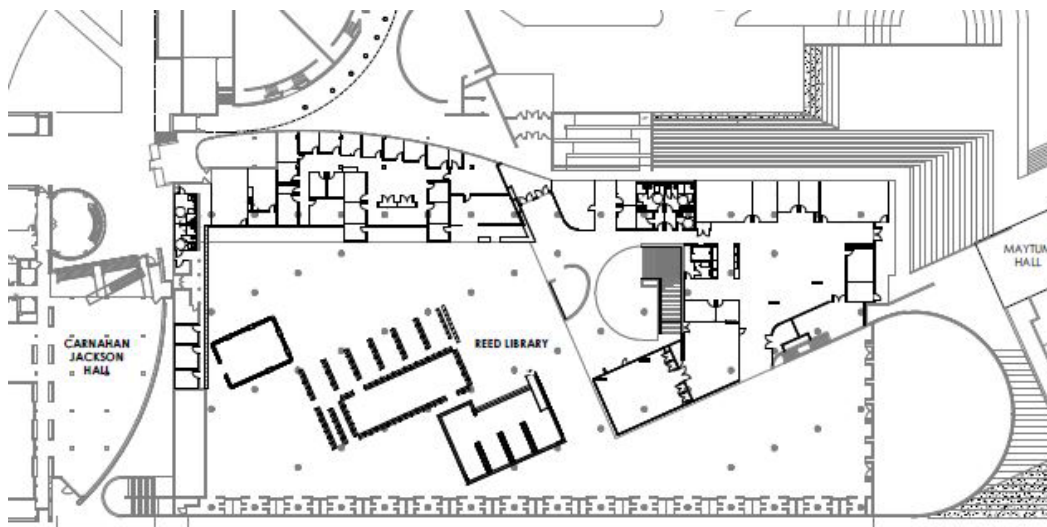


The renovation of Reed Library presents an opportunity for SUNY Fredonia to renew and revitalize one of its most prized assets on campus, to serve the students, faculty, and greater Fredonia communities for decades to come. The modernized building will celebrate the legacy of I.M. Pei's original design while prioritizing innovation and academic success.

The scope of this project is limited to the interior of the building. Partitions installed in previous renovations will be removed and reconfigured, providing greater transparency, connectivity, and improving wayfinding between student services. This project will introduce a new cooling and ventilation ductwork system, and additional electrical and data ports will be incorporated into the renovation to provide greater flexibility for future furniture arrangements. The renovation will also include upgraded finishes, lighting, and improved accessibility throughout the building. A new elevator will be added to provide circulation to the mezzanine floor from within the building.

In addition, the renovation will also address the Special Collection spaces located in Carnahan Jackson Center. Temperature and humidity control as well as a hybrid fire extinguishing system, will be provided for the Special Collection space located on the first thru fourth floors of the building.

The renovation will provide inspiring spaces and learning environments to foster collaboration and innovation, while enhancing academic support for Fredonia's students. The renovations will introduce a variety of learning labs, meeting spaces, seminar rooms, classroom, digital scholar lab, podcast studio, one button studio, and study spaces.



Proposed Floor Plan



PERSPECTIVE 1



PERSPECTIVE 2



PERSPECTIVE 3



PERSPECTIVE 4



MEZZANINE PERSPECTIVE 1



MEZZANINE PERSPECTIVE 2



MEZZANINE PERSPECTIVE 3



MEZZANINE PERSPECTIVE 4

Interior Elevation Study

- **Renovate Mason Hall – School of Music**



This project is an opportunity to showcase music education and provide inviting teaching spaces that will serve the SUNY Fredonia campus well into the future. The comprehensive renovation of Mason Hall supports the campus' strategic mission to address the necessary building system upgrades and requirements to maintain the School of Music's accreditation. The primary goal of the project is to provide the required temperature and humidity control, acoustical measures for sound insulation between teaching spaces, toilet room upgrades, and interior improvements throughout the project area.

Improving the interior temperature and humidity conditions within Mason Hall while maintaining the historic qualities of the building's exterior are the major concept drivers. Understanding the aesthetic qualities of the original 1941 building and the surrounding historic & iconic nature of

Fredonia's campus, led the design team to the decision of keeping the new mechanical systems inside the interior footprint of the building.

In addition to the original 1941 Mason Hall, temperature and humidity requirements will also be required within a few practice spaces in the 1960's annex building of Mason Hall. The room numbers of these spaces are 1046, 1051, and 1053.



2 FIRST FLOOR SOUTH PROGRAM

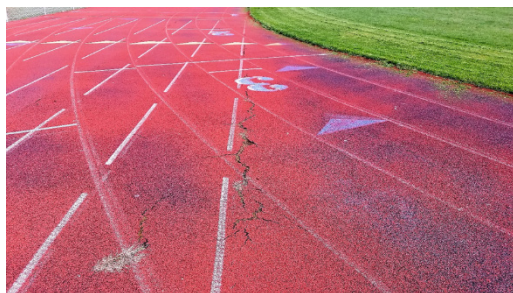


3 FIRST FLOOR NORTH PROGRAM



5 SECOND FLOOR SOUTH PROGRAM

• **Replace Turf Field and Track**



The sport of track and field that encompasses multiple athletic events has evolved into a core component of collegiate athletic programs throughout the country. Careful consideration of several factors is essential to the planning process, including location, infield and multiple-event functions, and selection of surfaces, equipment and lighting. Creating top-notch facilities with this kind of attention to detail is nowhere more important than on college campuses. For athletes, track and field

is all about incremental improvement – better times, farther throws, higher jumps. Improvements to track and field facilities have become important over the years.

It has been many years since the track surface was repaired; it has reached a critical state of disrepair. For Fredonia's track and field athletes/students to safely train and compete, Fredonia needs to address the deteriorating conditions with a full replacement, including the substrate. The

track also lacks proper turning radiuses, which can result in straining joints and ligaments in both training and competition. The infield is the original grass turf installed in the early 1970's. For field events, the condition of the grass pitch is problematic, with issues such as un-level grade and standing water making the field unusable. Other issues are the costs related to maintaining a natural turf field that is currently used by intercollegiate teams, intermural, and club teams as well as the community. Because of the need for athletics to have more field sport training and game day, playing facilities the campus is looking at installing a multisport synthetic turf field within the inside perimeter of the running track.



2. Residence Life Projects

- Studies and Reports:
 - None
- Planning:
 - Residence Hall Capital Plan
- There is no project in the RFQ Phase
- There are no projects currently in the design phase
- There is no project currently in the construction phase
- There is 2 project completed during this time period

Projects in RFQ, Design, Bid-Ready	Projects in Construction	Projects Completed
None	None	Gregory Hall Exterior Masonry Repair
		Residence Hall Condition Assesment

Residence Life Major Commissions - None

3. Additional Significant Accomplishments

- For years, Facilities Planning has supported construction and design solicitations and contracting activities for Campus Let projects. This exceptionally lengthy process is daunted by numerous laws and regulations governed by numerous State and federal agencies. Staffed with the knowledge and expertise to administer this program at the campus level, our campus receives additional funding to accommodate a construction and design work load through both contract administration and project management. The current value of Campus Let contracting functions over the past year is \$8,159,705.
 - Facilities Planning continues working with SUCF to establish yearly projects to fit within an established spending cap for both SUCF lead projects and Campus Let projects.
 - There were 3 new Major Capital Plan design starts for 2023-2024. However, design contiuned with the following projects:
 - Lanford Rehabilitation Phase II – Exterior
 - Jewett Hall renovation
 - Replace Turf field and Track
 - There were no new Major Residential design starts for 2023-2024, However the following project completed the construction phase:
 - Gregory Hall Exterior Masonry Repair Project

- Various design/construction activities were progressed and/or completed during the past fiscal year. Close coordination was maintained with the Construction Fund and the campus to ensure regulatory requirements were met and that all construction activities have been designed to meet the needs of the campus constituents. Major Projects progressed and/or completed include:
 - LoGrasso Hall AHU & Ventilation Upgrade – Completed
 - Maytum/Reed/McEwen Plaza Rehabilitation – In construction
 - Maytum Hall Roof Replacement – In construction
 - Kirkland Plaza Rehabilitation – In construction
 - Replace Turf Field and Track – Breakout Synthatic Turf Field in Construction
 - Lanford Rehabilitation Phase II – Exterior – In Construction Document phase
- Facilities Planning along with Facilities Services, Finance and Administration and the Construction Fund are in the process of continuing to refine the Campus Five-Year Capital Plan to fit within yearly spending caps and to establish funding requirements for major capital projects. The Capital Plan is a multi-year plan which allows the University to identify and propose programs to address the ongoing critical maintenance priorities of the campus. The objective of the Capital Plan is to protect, preserve, modify and maintain the campus' environment, facilities and supporting infrastructure. In addition, the Five-Year Capital Plan identifies several Special Project Initiatives such as the Jewett Hall Rehabilitation, Interior Reed Library Rehab and Rehab Mason Hall (1940 building) . This new plan has identified approximately \$151,030,000 million of critical maintenance projects and adaptation projects for the next 5 years.
- Facilities Planning continues to refine its requirements for building permits, tent structure permits, certificate of compliance and inspections during construction. During this fiscal year Facilities Planning issued 3 building permits, and 4 tent permits.

Statistical Data

A Summary of Current Capital Construction Projects is included which provides a breakdown of projects by Academic/Administrative Buildings, Residential Rehabilitation, and Other Site/Infrastructure. An accompanying chart illustrating the percentage of each category to the overall capital construction cost is included as well. Also provided is statistical data of contracting activities during this past fiscal year of 2023-2024, Campus Let Design and Construction Projects Report, and related charts illustrating unit support and volume/value for campus-administered contracting activities.

Assessment Update

Assessment Statement

Facilities Planning will address planning issues revolving around the Five-Year Capital Plan, Master Planning, and campus operational procedures. This department will also progress design/construction activities and monitor regulatory compliance to ensure functional and safe facilities and grounds, as well as work with campus authorities in their efforts to attain appropriate funding, support critical construction priorities, and identify measures to track sources of funding currently unavailable.

Assessment Activities

Facilities Planning completed or began the following activities per its goals of the 2021-2022 Annual Report and Assessment Update:

- Completed construction of Lanford Rehabilitation Project – Phase I Interior
- Completed construction of LoGrasso Hall AHU & Ventilation Upgrade
- Completed construction of Upgrade A/C & Humidity Controls - Mason Hall
- Continue construction of Maytum/Reed/McEwen Plaza Rehabilitation
- Started construction of Maytum Hall Roof Replacement
- Started construction of Kirkland Plaza Rehabilitation
- Started construction of Mason Hall Copper Siding Replacement
- Started construction of Replace Emergency Generators
- Started construction of Replace Turf Field and Track – Breakout Synthetic Turf Field
- Continue design of Lanford Rehabilitation Phase II – Exterior
- Continue design of Jewett Hall Renovation
- Continue design of Replace Turf Field and Track
- Started design of Renovate Mason Hall – SOM
- Started design of Replace Mechanical Equipment RAC
- Started design of Interior Rehab Reed Library
- Started feasibility study of Fenner House

Assessment Goals

- Work with all entities involved in the implementation of projects identified in the Five-Year Capital Plan.
- Continue to progress ongoing projects and identify and address those not already identified. Ensure close coordination with those affected by the planning and construction, and maintain close working relationships with the Construction Fund and Dormitory Authority in the implementation of campus construction. Continue to provide coordination among all relevant parties and monitor construction for compliance with contract and regulatory requirements. Projects already identified for advancement include:
 - Complete design phase and begin construction phase of the following projects:
 - Jewett Hall Rehabilitation Project
 - Lanford Rehabilitation Phase II – Exterior Project
 - Replace Turf Field and Track
 - Complete construction phase of the following projects:
 - Maytum/Reed/McEwen Plaza Rehabilitation Project
 - Mason Hall Copper Siding Replacement
 - Replace Turf Field and Track – Breakout Synthetic Turf Field
 - Replace Kirkland Plaza Project
 - Maytum Hall Roof Replacement Project
 - Continue design phase of the following projects:
 - Interior Rehabilitation Reed Library – Learning Commons Project
 - AHU & Controls Upgrade Phase VI RAC Project
 - Rehab Mason Hall (1940 building)

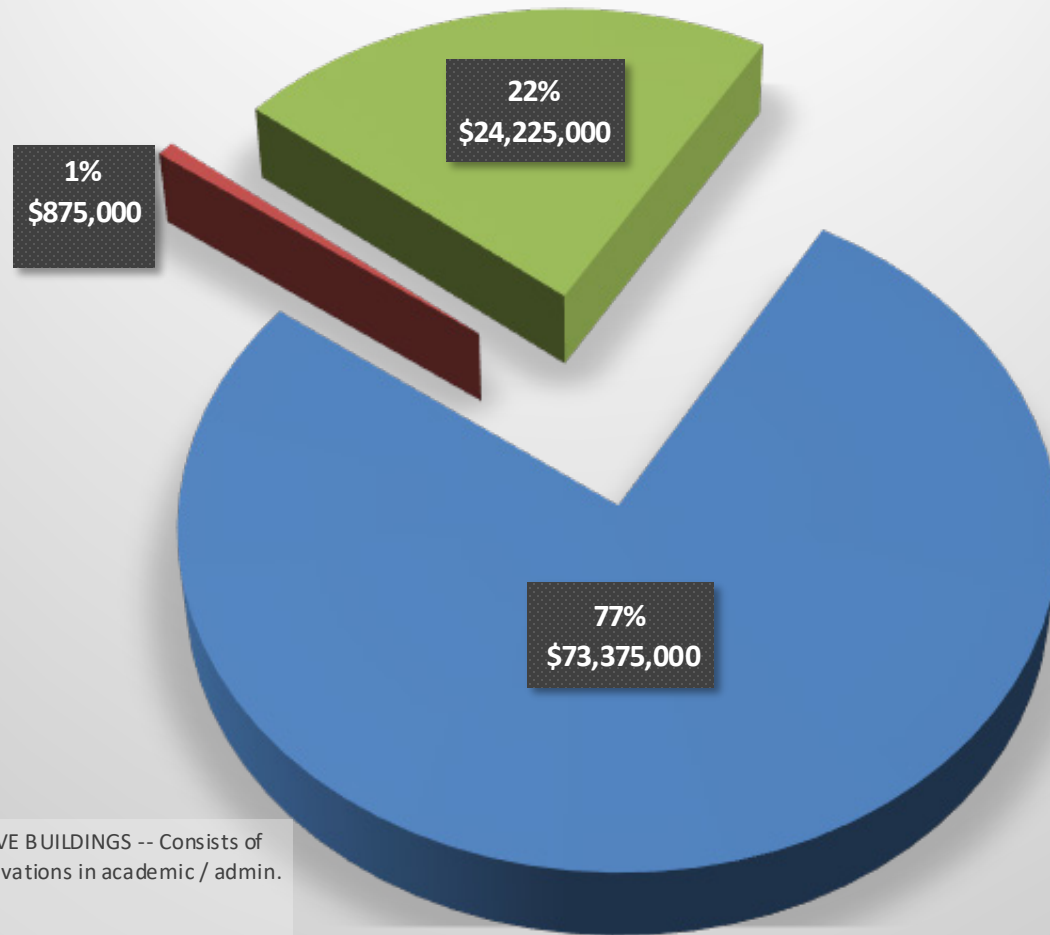
- Continue to provide support to newly identified priorities in an effort to obtain funding toward the continuous advancement of campus facilities and grounds. Continue appraising the Five-Year Capital Plan as well as establishing projects per the Campus Master Plan.
- Continue working with the Office of the State Comptroller, State University Construction Fund and DASNY to identify expectations and clarify standard measures for processing the procurement of consultant and construction contracts.
- Facilities Planning has taken on Minor Critical Maintenance (MCM) administrative responsibilities, and will work with Facilities Services to develop and establish MCM projects to facilitate the delivery of projects that reduce critical maintenance backlog and maintain a state of good repair for Fredonia's facilities. The following will be established:
 - Develop an MCM program that will establish internal controls and approval process for projects and expenditures pursuant to MCM procedures.
 - These controls and processes will be designed to ensure that MCM projects are administered in accordance with the State University Construction Fund's Campus Administered Project Procedures .

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Summary of Facilities Planning Capital Projects 2023-2024

Project Description	Estimated Overall Budget	Project Status	Contractor
<u>I. Academic/Administrative Buildings</u>			
Lanford Rehab Phase I - Interior	1,320,000	Completed	Peak Construction
LoGrasso Hall AHU & Ventilation Upgrade	3,100,000	Completed	John W. Danforth Company
Upgrade A/C & Humidity Controls – Mason Hall	635,000	Completed	MLP Plumbing & Mechanical, Inc.
Maytum Hall Roof Replacement	2,100,000	Construction	Jamestown Roofing & Progressive
Mason Hall Copper Siding Replacement	2,500,000	Construction	Rodrigiouz Construction
Lanford Rehabilitation Phase II – Exterior	1,300,000	Design	Flynn Battaglia Architects
Jewett Hall Renovation	49,660,000	Design	Mitchell Giurgola Architects
Renovate Mason Hall - SOM	2,500,000	Design	Architectural Resources
Interior Rehab Reed Library	10,150,000	Design	Architectural Resources
Replace Mechanical Equipment RAC	19,440,000	Design	M/E Engineering
Subtotal – Academic/Administrative Buildings	\$92,705,000		
<u>II. Residence Hall</u>			
Gregory Hall Exterior Masonry Repair	700,000	Complete	Upstate Restoration
Residence Halls Condition Assessment	175,000	Complete	Young & Wright Architects
Subtotal – Residence Halls	\$875,000		
<u>III. Other Site/Infrastructure</u>			
Maytum/Reed/McEwen Plaza Rehabilitation	5,800,000	Substantially Complete	Surety
Kirkland Plaza Rehabilitation	3,800,000	Construction	St. George
Replace Turf Field and Track (Breakout Synthetic Field and Turf Field & Track Projects)	13,670,000	Construction/ Design	Lakeside Construction / phZ Architects
Replace Emergency Generators	3,300,000	Construction	Frey Electric
Campus Clean Energy Master Plan	430,000	Completed	M/E Engineering
Subtotal – Other Site/Infrastructure	\$27,000,000		
Total: Design/ Construction /Equipment Budget	\$120,580,000		

CAPITAL CONSTRUCTION PROJECTS

Total Program Budget: \$120,580,000



- ACADEMIC ADMINISTRATIVE BUILDINGS -- Consists of new construction and renovations in academic / admin. buildings
- RESIDENTIAL REHABILITATION -- Consists of new construction and renovations in residential halls
- OTHER SITE/INFRASTRUCTURE IMPROVEMENTS -- Consists of other miscellaneous construction and/or renovation projects

FACILITIES PLANNING
Construction and Design Projects
July 2023 - June 2024

Facilities Planning Construction Projects (including Change Orders)		
Project #	Project Title	Cost
051038	Replace Kirkland Plaza	\$ 2,351,821.00
051039	LoGrasso Hall Upgrade AHU & Ventilation System	\$ 2,205,243.00
051040	Maytum Hall Lower Roof Replacement	\$ 402,965.00
051040	Maytum Hall Upper Roof Restoration Coating	\$ 335,750.00
D0591E	Gregory Hall Exterior Masonry Repair	\$ 616,316.00
	TOTAL:	\$ 5,912,095.00

Facilities Planning Design Projects (including Amendments)		
051037	Rehab Lanford Phase II - Exterior	\$ 159,999.70
051038	Rehab Kirkland Plaza	\$ 251,640.00
051039	LoGrasso Hall Upgrade AHU & Ventilation System	\$ 307,043.91
051040	Maytum Hall Roof Replacement	\$ 155,202.00
051053	Fenner House Feasibility Study	\$ 159,748.00
D0591E	Gregory Hall Exterior Masonry Repair	\$ 107,860.00
D0591K	Residence Halls Condition Assessment	\$ 106,117.00
	TOTAL:	\$ 1,247,610.61

Minor Critical Maintenance (Procurements made through Facilities Planning, Projects Managed by Fac. Services)		
051050	MCM 23-24	\$ 500,000.00
051054	MCM 24-25	\$ 500,000.00
	GRAND TOTAL	\$ 8,159,705.61

Facilities Services

- **Energy and Mechanical Systems**
 - **Building Automation Systems**
 - **Electrical Services**
 - **Plumbing Services**
 - **HVAC/R**
- **Custodial Services and
Grounds and Landscaping**
- **Facilities Trades Services**
 - **Structural Trades**
- **Office Operations**

FACILITIES SERVICES

Introduction

The Facilities Services Department's major focus is to provide efficient, quality support services to all departments, academic and non-academic, that are a component of the campus. We plan, create and maintain the campus both inside and outside including an outstanding physical appearance. A dedicated team of maintenance and cleaning staff work to provide clean, safe and well-maintained facilities that support the overall mission of Fredonia.

The department, under the direction of the Director of Facilities Services, includes 130.50 full-time permanent, part-time and seasonal positions (including vacancies). Numerous students during the academic year and summer months provide additional support staffing to the department. The department maintains 2,331,461 gross square feet of buildings; 249 acres of land; 24 acres of parking lots with 3,190 parking spaces; over five miles of roadways; and over eight miles of sidewalks. The department services and maintains more than 12,000 energy management control points; 6,000 fire alarm devices; 5,000 doors; 2,500 clocks; 1,700 motors; 571 pumps; 490 street lights; 438 fan coil units; 277 air handlers; 189 drinking fountains; 100 boilers; 100 backflow devices, 99 hot water heaters; 46 fire hydrants; 37 elevators and lifts; 23 emergency generators; 26 outdoor emergency phones, and over 20,000 light fixtures.



From left to right: Mark Delcamp and Tim Bentham

The department services and maintains more than 12,000 energy management control points; 6,000 fire alarm devices; 5,000 doors; 2,500 clocks; 1,700 motors; 571 pumps; 490 street lights; 438 fan coil units; 277 air handlers; 189 drinking fountains; 100 boilers; 100 backflow devices, 99 hot water heaters; 46 fire hydrants; 37 elevators and lifts; 23 emergency generators; 26 outdoor emergency phones, and over 20,000 light fixtures.

The department is comprised of several units all working toward the department and University missions:

1. Energy and Mechanical Systems
 - a. Building Automation Systems (EMS)
 - b. Electrical Services
 - c. Plumbing Services
 - d. HVAC/R (Heating Services / Refrigeration / Air Conditioning)
2. Custodial Services and Grounds and Landscaping
 - a. Cleaning and Minor Maintenance
 - b. Moving and Event Setup
 - c. Flooring and Window Treatment Installations
 - d. Grounds and Landscaping Services and Athletic Field Management

3. Facilities Trades Services
 - a. Structural Trades (Carpentry / Masonry / Lock Shop / Painting / Roofing)
4. Office Operations
 - a. Work Order Processing
 - b. Key Management
 - c. Fleet Vehicle Reservations
 - d. Purchasing and Requisitioning
 - e. Personnel Record Management
 - f. Work Order System Management
 - g. Physical Space Inventory Management
 - h. Webpage Development

Mission Statement

Our purpose in the Facilities Services Department is to support the academic mission of the campus by providing quality customer service, well maintained facilities and a safe, clean environment that enhances the appearance and condition of the campus for the campus community, visitors and guests while encouraging teamwork; encouraging staff to take pride in themselves, the organization and services provided by setting high quality standards and accountability which provides acknowledgement and recognition to the staff, which is our most valuable resource.

Annual Report

The Facilities Services Department continues to identify maintenance repairs and improvements across the campus in all buildings as part of the biannual building inspections and routine review of the existing conditions. The department continues to strengthen the commitment to the campus, students, campus mission and sustainability efforts developed across the campus.

The Facilities Services Department utilizes an electronic work order system to manage over 6,000 work orders generated each year. The requests submitted each year to the department for work range from general repairs, to routine requests to hang pictures. The annual preventative maintenance work and work orders generated internally by the staff within the department are categorized by the types shown below. The category of the work order created defines the required response time for the staff within the department.

Category	Description	Allotted Time
Emergency Maintenance	Same day response required (graffiti, personal safety, security)	2 days
Trouble Calls	Requests from faculty, staff and students	7 days
Corrective Maintenance	Inspections; furniture repairs; sign installations; Work orders generated by the Facilities Services staff	30 days
Preventative Maintenance	Pre-planned work orders	30 days
Non-Maintenance	Event setups, moving, hanging pictures, issuing keys	30 days
Projects	In-house and capital projects	Varies

The work order category response times are based on the expected number of days that someone requesting work should expect for the work to be completed. Often there are conditions that will alter the completion time, as in work requested for a specific time period such as when classes are not in session, or if parts must be ordered to complete a repair.

The Facilities Services Department manages many projects across the campus each year in addition to the day-to-day maintenance and operational activities performed by the department. Project development and oversight have grown significantly over the past several years. Working closely with the campus departments and leadership, many wonderful enhancements to the campus have been completed during the past year. The department is responsible for project design, cost estimating, and coordination of construction for all in-house renovation projects. Working closely with engineers, architects and contractors for work performed on campus, the staff prepares the scope of work, budget specifications and design for areas proposed for renovations. Administering many replacement projects including preparation of budget specifications, coordination of bid procurement and oversight of work in progress is also performed. Many Minor Critical Maintenance projects are managed by the Facilities Services Department including obtaining bids and quotes, authorizing purchases and specifying materials, monitoring work in progress, authorizing payment applications and performing a punch list review of work at completion. The department continually works to communicate and coordinate in-house maintenance and renovation projects with faculty, staff and students to ensure project issues are resolved and that projects are completed on schedule.

Significant Accomplishments

- Completed many improvements across campus including updating lighting to LED lighting, fire alarm maintenance, plumbing and mechanical improvements, painting of many areas, maintaining the campus grounds, preparing and cleaning the building interiors and exteriors for numerous events across the campus, and ensured the heat, air conditioning, lighting and water were operational each day.
- Prepared the project request information for the State University Construction Fund for the 2023-2024 Minor Critical Maintenance program totaling \$850,000.
- Completed or started several projects as part of the Minor Critical Maintenance program and DIFR Funding including card access upgrades, HVAC improvements, and residence hall duct cleaning and general improvements.
- Assisted FSA with new washers/dryers installation in the Townhouses.
- Completed classroom improvements including the Thompson Hall NASA Room.
- Completed, sidewalk and throughout the entire campus.
- Completed painting in the student rooms at all residence halls, several classrooms, hallways and many office areas on campus.
- Prepared the campus for many events.
- Completed new flooring installations at several locations on campus including offices, classrooms, and areas in the residence halls.
- Prepared the Residence Halls for the return of students.
- Maintained the campus grounds, planting beds, and trees.
- Completed improvements to many Resident Director Apartments.
- Completed power washing of all exterior stairways at the Townhouses.
- Completed installation of data wiring for many new wireless access points on campus.
- Completed several office improvements and relocations in Maytum, Fenton and LoGrasso Halls.
- Installed many new banners on the light poles around campus.
- Completed the HVAC controls in the Natatorium
- Completed the installation of the hydration stations at Nixon Hall.
- Assisted several student groups with many outdoor events.
- Completed several various MCM improvements, totaling approximately \$527,000.
- Completed approximately 6100 work orders and PM's.
- Completed the Men's Soccer Locker Room Improvements.

Energy and Mechanical Systems

The **Building Automation System (BAS)** unit controls, monitors and regulates the campus HVAC systems by providing alarm conditions (high water in basements or temperature ranges within buildings, equipment, etc.) and controls the operation of exterior lighting. The BAS also monitors area conditions. When these conditions exceed parameters established by the operator of the BAS, alarms are transmitted and crews are dispatched to respond. The group continues to find new areas to expand the use of the BAS to control equipment that will help in the reduction of energy consumption, and to add building functions to the BAS to monitor and provide alarms for when they malfunction. Controlling the campus' energy usage is the most significant operation of this group. Currently, there are over 12,000 control and monitoring points throughout the campus.

The primary use of the BAS is to control and schedule mechanical equipment functions that provide ventilation and regulate the temperature in campus buildings. In addition, the BAS is used to regulate most outdoor lighting.

Examples of the monitoring and scheduling include:

- Space temperatures
- Adjusting time schedules for heating, ventilation, air conditioning, and refrigeration equipment based on occupants use of the spaces on campus
- Heating Hot Water/Boiler Systems
- Chilled Water/DX Air conditioning Systems
- Air Handling/VAV Systems
- Air Handling Fan Speeds
- Hot Water/Chilled Water Pump Speeds
- Fume hood Controls in Science Center and Jewett Hall
- Outside air temperature (OAT)
- Exterior lighting at:
 - Parking lots
 - Walkways
 - Rockefeller Arts Center
 - Symphony Circle
 - Roadways
 - Tennis courts
 - Basketball courts



From left to right: Randy Grant and Tim Bentham

Should the equipment malfunction, the BAS generates an alarm that is monitored by Facilities Services. Facilities Services responds and assesses the malfunction. The BAS also monitors and generates alarms for other building functions such as:

- High water in electrical manholes
- Water alarms in the basements of Nixon, Houghton, Maytum, and Thompson Halls
- The Steele Hall Ice Rink operation
- The Natatorium pool operations
- Domestic hot water
- Various FSA freezers and coolers
- Biology's "80 degrees below Zero" Freezers Alarm. Text and email messages sent to personnel
- Air compressors

Significant Accomplishments

- Continued to expand the use of the BAS by installing additional control and monitoring points.
- Coordinated with Facilities Planning, SUNY Construction Fund, Engineers and Contractors for several projects on campus
- Continued to build new and modified existing animated graphics for equipment that is controlled by the BAS.
- Managed and distributed contractor access cards for Facilities Services and Facilities Planning.
- Increased outside air intake in most buildings for better ventilation.

The **Electrical Services** unit is responsible for maintaining the campus-wide electrical systems. The staff maintains the interior and exterior lighting and electrical distribution systems within and between all buildings, emergency phones, electric motors and controllers, fire alarm systems and elevator electronics. In addition to performing many repairs throughout the campus, the staff uses their skill to perform many in-house projects each year.

Significant Accomplishments

- Addressed lighting concern from the campus safety walks in various locations.
- Managed the annual testing of the campus fire alarm system.
- Completed electrical upgrades in Room W114 (NASA) Thompson Hall.
- Assisted many contractors with electrical needs on the campus.
- Completed electrical and data upgrades to Computer Room 309 RAC.
- Completed all electrical upgrades in the Women's Soccer Locker Room remodel project.
- Worked with Bison Elevator on minor repairs to various elevators on campus.
- Completed the installation of the first stage of the new mass notification system with JCI Simplex.



*From left to right: Stephen Romanik, Daniel Riewaldt
Rodney Hayes and Thomas Deike*

The [Plumbing Services](#) unit maintains the potable water, storm and sanitary drainage systems on campus. The staff maintains the emergency eye-wash and shower stations, swimming pool, plumbing fixtures, supply fan units, water softeners, fire hydrants, backflow preventers, dishwashers, water purifiers and natural gas lines. In addition to performing many repairs throughout the campus, the staff uses their skill to perform many in-house projects each year.

Significant Accomplishments

- Completed annual preventative Maintenance, repairs and inspection of plumbing fixtures in the townhouses.
- Performed repairs to the natural gas systems on the campus.
- Completed several repairs to the water lines in many buildings.
- Weekly inspections of emergency eyewash systems.
- Completed annual preventative maintenance for all buildings including drinking fountains, sump pumps, domestic hot water heater and building fixtures.
- Completed the scheduled maintenance of the lap and dive pools and made numerous repairs.
- Read the water meters quarterly.
- Worked on many work orders for many plugged drains on the campus.
- Completed annual maintenance inspections and repair work to all plumbing fixtures in the Residence Halls.
- Performed PM's on all hot water tanks on campus.
- Performed PM's on all sump pumps and pits on campus. Replaced pumps and floats when needed.
- Maintained all sanitary and storm lines on campus including jetting of several lines.
- Completed numerous repair work to water lines.
- Managed the semi-annual drain cleaning at Tim Hortons, Starbucks, the dining halls and Commissary.
- Serviced University Stadium facility and ballfield irrigation systems.
- Managed the ordering of all special parts for the plumbing shop and maintain parts for emergency repairs on hot water tanks and water lines.
- Repair on athletic fields including fixing broken heads.
- Replaced a main water line supply valve in the Science Center.
- Replaced main line water supply valves in various buildings on campus.
- Maintained all outdoor water features on campus.
- Serviced washers and dryers in the RD apartments.
- Replaced hot water tanks in the townhouses as needed



From left to right: Jeff Peterson, Steve Kosierb, and Jim O'Connor

The HVAC/R unit is highly trained and responsible for the maintenance and operation of the heating systems, refrigeration, air conditioning and exhaust systems throughout the campus. Preventative maintenance is performed on all satellite boiler equipment, emergency generators and building components. They provide complete maintenance on the campus heating systems, its distribution system, exhaust fans, controllers, metal ductwork distribution systems, campus ice machines, walk in coolers and freezers, and laboratory fume hoods. Chiller equipment and cooling tower water treatment is maintained by this group. In addition to performing many repairs throughout the campus, the staff uses their skill to perform many in-house projects each year. The staff maintains the Heating Services office 24/7 during the academic year providing continuous customer service to the campus.



First shift from left to right: Matt Hill, Casey Ackendorf, Herb Famer and George Tucker



HVAC 2nd Shift From left to right: Dan Halas and Matt Hill

Significant Accomplishments

- Performed preventative maintenance on all of the heating boilers throughout the campus.
- Provided after-hour and weekend coverage to the campus.
- Responded to all work orders regarding heating and cooling issues.
- Completed monthly testing of the emergency generators throughout the campus.
- Performed preventative maintenance on all refrigeration equipment on campus including refrigeration equipment at all FSA locations, the Biology department, water coolers throughout campus and air conditioning equipment across the campus.
- Completed the annual maintenance and startup of equipment at the Ice Rink in Steele Hall.
- Worked closely with the Building Automation Systems to make systems on campus perform more reliably and efficiently.
- Provided temporary air conditioning for summer programs, Resident Director Apartments and several offices on campus.
- Continually monitored all campus cooling towers and water treatment to comply with regulations implemented by the New York State Department of Health, to prevent Legionella growth in the cooling towers.

- Worked with Feedwater Treatment Systems to train our new Plant Utilities I on water treatment for our heating and cooling system and also to address issues of Legionella growth in our cooling towers on campus.
- Worked with NYSDOL to inspect multiple boilers on campus.
- Managed inspections and repairs to several emergency generators.
- Continue working with NYSDEC to plan out updating our refrigeration systems to refrigerants with low global warming potential.

Custodial Services and Grounds and Landscaping

The **Custodial Services** unit includes the Assistant Director, Head Janitor, four Supervising Janitors, and several Janitors, Cleaners and Facility Operations Assistant 1 positions. Custodial Services is responsible for the routine and construction cleaning of academic/administrative buildings and residence halls, which includes waste removal, collection of recyclable materials, dusting, mopping, waxing, and polishing terrazzo floors, vacuuming, shampooing of carpets, cleaning of public areas and restrooms, lamp replacement, window washing, surplus equipment transfers and snow removal at building entrances which ensures the entrances are safe and well maintained.

The department also provides minor routine maintenance and repair of items such as window blinds, drapes, and furniture and performs many various minor handyman types of repairs. Most notably, the unit is responsible for commencement setup at Steele Hall each year and provides setup and support for many other special events throughout the Academic year. In addition, Custodial Services is responsible for opening and closing most buildings and provides moving services for the campus.



1st Shift Custodial

From left to right, front row: Julie Echiverria, Jackie Hill, Silverio Burgos, Darlene Miller, Trisha Stoll; 2nd row: Josh Roman, Cathy Walters, Kyle Baumgartner, Elizabeth Meadows, Melanie Mazur, Robert Rivera, Bob Jank, Elizabeth Goblirsch; back row: Tim Clark, Deb Kujawa, Scott Pagano, Bryan Miller, Lee Szalkowski, Mark Stewart, Wayne Seabolt, Jeff Jakse, Candy Nolan, Richelle Steward and Art Franklin



2nd Shift Custodial

From left to right: Matt Smith, Amanda Ippolito, Derek Case, Hailey Rivera, Erin Ransom, Donna Poncharik, Tony Pagano, Robert Bajdas, Seth Sexton and Michael McNaughton

Significant Accomplishments

- Continued to serve as a major contributor to the successful maintenance of Fredonia's facilities, including the proactive repairs based on daily observations, biannual building inspections, and the updated version of the Annual Residential Custodial Report (ARCR) conducted immediately after commencement.
- Performed moving services for many departments including inter-office furniture moves for academics and residential furniture removal as many old items are being replaced.
- Provided extensive cleaning of buildings during the summer months to prepare for summer camps, to include areas that had major construction work occurring during the summer months and break periods.
- Managed the relocation of Academic Advising from Reed Library to Fenton Hall and the Registrar's office from Reed Library to Maytum Hall.
- Managed the student bedroom mattress replacements and the recycling for used mattresses.
- Managed the Mason Hall Rosch Recital Hall stage floor maintenance.
- Assisted with the coordination, setup and teardown for many campus events, notably commencement, Eclipse, Relay for Life and Boces kickoff.
- Worked with Facilities Planning to support many capital projects.
- Managed all window treatment replacements in several areas of the campus.
- Managed repairs and replacement of carpet and vinyl floor tile in offices, classrooms, hallways and student rooms.

- Continually evaluated and made the necessary staffing changes to support the day-to-day custodial operations. Made several changes to initiate budget savings while enhancing services to the campus.
- Continued working with and providing services to Residence Life to ensure the cleaning standards are being met.
- Refinished wood floors in Mason Hall 1075/1080, Fenton Hall 105, Williams Center Blue Lounge and Gregory Hall.
- Refinished the Terrazzo Floor in the Williams Center MPR and surrounding areas.
- Planned, Coordinated and Provided window washing for many campus buildings.
- Planned and coordinated the maintenance and upkeep of pool robots and floor scrubbers.
- Changed out 750 lightbulbs in Reed Library.
- In conjunction with the Office of Environmental Health and Safety and Sustainability, continued to provide annual training in Right-to-Know and Blood Borne Pathogens, as well as the annual Custodial Safety training.
- Worked closely with Property Control and University Services and provided approximately 78 equipment transfers of various surplus items.
- Worked with Rural Ministries for collecting donations from the residence halls as part of student move out.

The [Grounds and Landscaping Services](#) unit is responsible for maintaining 249 acres of land; 24 acres of parking lots with 3,190 parking spaces; over five miles of roadways and over eight miles of sidewalks. This past year, the unit included the Head Grounds Supervisor, Senior Athletic Grounds worker and seven skilled staff consisting of Highway Equipment Operators and Facility Operations Assistant 1 positions.

The staff specializes in all aspects of landscaping, forestry, and athletic field maintenance, as well as being CDL qualified highway and construction equipment operators. This group is responsible for the care and maintenance of every square inch of lawn on campus. They prune and maintain the trees and shrubbery, design, plant, and maintain all of the numerous flower beds. The group is also responsible for around the clock emergency support in the event of storm damage. During the winter months, the maintenance includes snow removal and ice control 24 hours a day. In addition, they maintain all traffic and regulatory signs along the campus roadways and parking lots. They perform special operations, such as excavation, hauling, and traffic control for in-house, electrical, plumbing and concrete work. They also perform set up and parking control operations for events such as Alumni Weekend, Commencement, sporting events, and many more.



Front row from left to right: Rich Newton, John Cole, John Jakubowicz, Gerald Polvino, Jim Foringer and Phil DiFrancisco; back row: Robert Schwerk and Cameron Hayes

The grounds crew also maintains several athletic fields, including the University Stadium soccer/lacrosse fields; one practice soccer field, a Club Rugby pitch, baseball and softball fields, outdoor running track, outdoor tennis and basketball and volleyball courts, and the cross-country running course that runs across many of the campus fields, and through parts of the campus woodlot. The maintenance includes layout, lining, irrigation, Integrated Pest Management, and fertilization of the fields. The crew also cleans up debris and litter, and maintains the numerous waste and recycling stations while continually looking for ways to enhance the campus' appearance.

Significant Accomplishments

- Maintained existing planting areas, keeping costs down by working with established Perennials, with minimal purchasing of new plants in an effort to be more environmentally, and fiscally sustainable.
- Continued the training and development of staff to provide the highest quality NCAA Division III outdoor athletic venues at our multi-use stadium, baseball and softball fields, track, volleyball, tennis and basketball courts, rugby field and the balance of acreage where campus groups, general students and community alike, partake in activities.
- Continued changing over old wooden parking sign posts, replacing with new galvanized metal posts, to improve appearance and cut down on high cost of wood products, as well as source materials.
- Continued to work on redesigning areas of landscaping on campus, to make them more cost effective to maintain.
- Expanded No-Mow/Low-Mow areas on campus, in an effort to reduce costs of labor and fuel.
- While students were on winter break, many lots were closed off and not plowed or salted, in an effort to reduce fuel, equipment, material and manpower costs.
- Continued the use of environmentally favorable products such as winter ice melt, weed treatments and fertilizers.
- Continued the use of “Horganix” organic fertilizer usage on Athletic Fields and highly visible areas on campus, in an effort to and reduce the amount of chemicals used on campus turf.
- Provided tools, and occasionally assisted or guided various campus groups that were performing service projects, whether an invasive weed pull on campus
- Maintained the miles of roads and sidewalks, and acres of parking lots through the winter months.
- Installed new and updated street and parking lot signs at various campus locations.
- Worked to maintain a clean, sustainable, and friendly environment for all who use the campus on a daily basis.
- Completed installation of additional engraved pavers for Alumni Affairs, in the walkway at the Williams Center.
- Completed weed spraying and heat treatment of weeds in many areas around campus, utilizing a new glyphosate alternative weed-control product when needed.
- Worked on trimming of trees and removal of several dead trees, and assisted contractors with their work in removing and clean-up of several large dead trees around campus.
- Worked with and around contractors to maintain areas that are blocked off for construction work, and to restore any areas left unfinished.
- Assisted Facilities Planning and Construction Fund capital projects with removal and storage of unused materials, staging for later use.
- Provided assistance with planning and preparation, as well as on-site support, for the 2024 spring eclipse watching event. We unfortunately could not control the weather.
- Assisted FSA with delivering large truck loads of stockpiled asphalt millings for the College Lodge driveway grading.
- Assisted FSA with equipment and manpower to help remove and recycle old laundry appliances from the University Village Townhouses.
- Continually maintain Campus Memorial Garden, and add new trees and plants as they become available.
- Assist Campus “FredGrows” garden club with removing sod in areas and providing compost and mulch to allow them to create a pollinator garden near the Science Center.
- Assisted with delivering loads of mulch for the campus and community garden behind the Science Center
- Assist faculty with digging of a soil testing site in the area off of Ring Rd near the Grounds Maintenance building.
- Assist the Village of Fredonia with Village Sanitary Sewer line replacement project, where it runs through the campus woodlot.

Facilities Trades Services

The **Structural Trades** unit consists of five groups including Carpentry, Masonry, Roofing, Painting and the Lock Shop. The Structural Trades unit provides repairs in all areas of the campus including the Residence Halls, Academic buildings and several other campus buildings. In addition to performing many repairs throughout the campus, the staff uses their talents to perform many in-house projects each year such as upgrading classrooms, renovating office areas or replacing concrete sidewalks.

Services provided include repairing broken and damaged windows; repairing wall damage; replacing bathroom tile; replacing tile flooring; repairing carpeting; performing needed repairs to furniture and cabinetry; repairing doors, door hardware and window systems; fabricating custom shelving and similar pieces of furniture; routine work requests to hang pictures, signs and bulletin boards; repairs to brick and masonry walls; installation of masonry door frames; repairs to stair nozings, and installing concrete light pole bases.



From left to right: Michael Cope, Luis DeJesus, Kevin Malkowski, Nicholas Polvino, Andrew Cross, Richard MacKenzie, Craig Sutton and James Kuras

Expertise in the area of roofing enables the investigation and identification of roof leaks, with many repairs performed in-house. Support and supervision are provided on capital projects for roof repairs, replacements and new installations. Semi-annual inspections are performed on all roofs throughout the campus. The existing conditions are reviewed, roof drain strainers are cleaned, and leaves and debris are removed from the rooftops. This proactive approach helps extend the life cycle of the roofs.

Painting services are provided for many offices, classrooms, student rooms and public areas. The staff paints and refinishes doors and window frames; power washes outside areas; removes graffiti; makes special stenciled signage; refinishes tabletops and chairs, and paints light poles when needed.

The Lock Shop services all campus doors including all hardware, locking mechanisms, door closers and associated parts. Safes, vaults, cabinets and various other items containing locking mechanisms are also serviced. The staff is called upon to open locks when no keys exist or when the locks are inoperable. This group also services and maintains the hardware side of the card access system on campus that integrates with the FREDCard and authorizes or denies building entry. In addition, the Lock Shop assists in the specification and replacement of doors and hardware. Keys are prepared and distributed to Faculty, Staff and Students by the Lock Shop, which maintains detailed records of the key assignments.

Significant Accomplishments

- Continued painting of numerous offices, hallways, classrooms, corridors, doors and frames, and conference rooms in the Academic buildings and Residence Hall student rooms.
- Developed, maintained and prepared lock systems; keys for numerous Faculty, Staff and Student requests; programmed many users in the card access system.
- Continued to address repairs identified under the Annual Residential Custodial Report (ARCR); this program focuses on maintaining the student living areas within the Residence Halls.
- Continued to identify and install new room signage in many areas to enable guests, maintenance staff and emergency staff to better locate rooms.
- Completed concrete sidewalk replacements at several locations on campus.
- Completed several improvements at the Residence Halls.
- Completed smart classroom improvement projects.
- Completed repairs to several shower basins at the residence halls.
- Completed improvements at several RD Apartments.
- Remodeled women's basketball and locker room.
- Baseball and Softball Field Dugout Roof Replacement
- Completed several door replacements.
- Updated exterior signage at various locations on campus.
- Completed roof inspections and maintenance.
- Coordinated many window repairs and roof repairs with local contractors.
- Completed the McGinnies Hall bottle filler installation.
- Dods/Steele upper hallway connecting door replacement
- Dods Hall baseball team locker room door replacement
- RAC Art Gallery (Both) Interior Painting
- Various Office and Classroom Painting
- Baseball and Softball Field Dugout Roof Replacement
- Gregory Hall UPD – Two roof access door replacements
- Interior Painting Various Student Rooms, Bathrooms, Doors, Frames, Hallways

Office Operations

The **Office** is the customer service center for the Facilities Services Department. This unit is staffed with one Office Assistant position. The staff is responsible for maintaining the following information and services for the Facilities Services Department:

- Receiving and distributing trouble or emergency calls from campus constituents to applicable personnel in trades.
- Requisitioning for supplies, projects and monthly payment of all blanket purchase orders by procurement card.
- Processing key requests for faculty, staff, and students.
- Fleet Vehicle
 - Scheduling
 - Monthly Recharges
- Maintaining records for:
 - Work Order System (PM's, building inspections, and corrective maintenance)
 - Department budget
 - In-house and minor critical maintenance projects
- Maintaining the department's personnel records for:
 - Change of Status transactions (COS)
 - Performance Evaluations
 - CDL Compliance
 - Accident Reports



From left to right: Mark Delcamp, Shannon McKoon and Tim Bentham

Significant Accomplishments

- Processed purchases with the online Web Procurement System.
- Continued usage of the Citibank Visa Procurement Card.
- Prepared the Facilities Services staff meeting minutes.
- Processed COS forms for all Facilities Services transactions.
- Prepared the overtime-summary report on the web-based overtime database.
- Monitored and issued probationary reports for both permanent and temporary employees.
- Monitored and issued yearly evaluation reports for permanent employees.
- Maintained the student key database, deposits and refunds.

- Maintained the database and records for pest control needs.
- Processed 7,634 work orders.
- Processed 314 online requisitions in FREDmart.
- Assigned, processed and tracked many projects including in-house; Minor Critical Maintenance; Capital Construction Projects; and Residence Hall (DIFR) projects.
- Processed 45 student key requests.
- Reconciled purchases on blanket purchases to local vendors on a monthly basis.
- Processed 454 pest control problems.
- Processed 495 transactions using the Citibank Visa procurement card for a total amount of \$250,015.64.
- Managed the Marketplace uStore for student key deposits and refunds including 34 payments and 15 refunds of the deposit.
- Maintained the Facilities Services portable two-way radio inventory.
- Maintained the Facilities Services department webpage.
- Maintained the staff Google email groups for Facilities Services, Finance and Administration and FSA.
- Coordinated several Asbestos Abatement Projects.
- Coordinated the annual respiratory physicals and fit testing for the Trades staff.
- Coordinated the quarterly CDL license random testing.
- Coordinated the monthly reserved SEFA parking spaces.
- Coordinated the semi-annual fire system ansul inspections.
- Coordinated overhead door repairs.
- Coordinated man lift inspections and repairs.
- Coordinated the annual purchasing of road salt for winter use.
- Assigned all Fire Inspection work orders resulting from the annual OFPC inspection.
- Attended the semi-annual building inspections including walking through all campus buildings and identifying needed work orders during the fall and spring semesters.
- Assisted several student groups with materials and setup for several outdoor events.
- Managed the annual rolling fire door inspection.
- Managed the Maintimizer work order system.
- Prepared and distributed the monthly PM work orders
- Maintained the Physical Space Inventory (PSI) information database as required by SUNY System Administration.

Statistical Data

During the past year, the department completed projects that involved all the units within the department. The Facilities Services Department embraces the practice of using environmentally sound building materials and techniques. Working closely with the staff within the Facilities Services Department, each unit provides valuable participation with each project. This team approach strengthens the commitment to ensure the health and safety of the campus community, and that the preservation of the facilities is a top priority. Projects are completed in Academic, Administrative and Residence Hall buildings across the campus. Additionally, many projects have been identified, scope of work created, and budgets prepared for future work on campus.

Work orders were completed throughout the campus in all buildings during the past year. The following chart shows the total number of work orders completed during the past year compared to previous years.

Trade	No. Closed 2023-2024	No. Closed 2022-2023	No. Closed 2021-2022	No. Closed 2020-2021	No. Closed 2019-2020	No. Closed 2018-2019	No. Closed 2017-2018	No. Closed 2016-2017	No. Closed 2015-2016	No. Closed 2014-2015	No. Closed 2013-2014
Structural	1667	985	915	1,008	1,349	1,742	1,448	1,562	1,830	1,734	1,868
Electrical	1550	942	893	850	966	1,268	1,314	1,227	1,515	1,354	1,631
HVAC/R	885	829	966	1,067	1,308	1,795	1,678	1,667	1,642	1,374	1,403
Building Auto.	94	92	106	126	38	17	44	96	68	40	33
Lock Shop	709	733	679	680	827	1,207	1,139	1,112	1,491	1,295	1,381
Plumbing	1203	1,267	1,283	1,187	1,363	1,960	1,907	1,622	1,628	1,429	1,267
Grounds	201	246	225	341	285	384	442	436	343	207	200
Asbestos	0	1	0	3	2	20	15	16	45	47	55
Custodial	1325	1,310	1,161	993	1,142	1,569	1,470	1,361	1,430	1,416	786
Total:	7,634	6,405	6,228	6,255	7,280	9,962	9,457	9,099	9,992	9,331	8,624

Assessment Update

Assessment Statement

The Facilities Services department maintains an effective working relationship with the campus community to assist in providing an environment that enhances the overall campus experience, while responding promptly and professionally to meet the demands of the campus by continually evaluating performance and striving to meet the expectations for a safe and healthy work environment. The department provides outstanding customer service to the campus community with continued evaluation of performances, services and equipment used by the department, and regularly reviews the needs and concerns of our customers to provide the highest quality service, which encourages staff to lead by example, take pride in their work and commit to the department mission by providing excellent customer service to the campus community.

Assessment Activities

- It is standard procedure to observe, review, inspect and monitor staff work while in progress and when completed to ensure the proper use of materials and equipment, workmanship, that regulations and codes are followed, schedules are met, and that the work is performed according to plan.
- Training, instruction and assistance is provided to ensure assignments are completed accurately and efficiently.
- Completed work orders to ensure work is completed timely and that staff is working efficiently.
- Comments from faculty, staff, students and visitors express great appreciation and support of the work performed on campus by the Facilities Services Department. The comments are often unsolicited.

Assessment Goals

- Continue Incentive Program Safety Awards for proper chemical labeling, correct bulb storage and no chocked doors.
- Review appropriate procedures to perform all custodial operations in the most effective, efficient and economical manner.
- Evaluate and modify standards for the quality and quantity of work produced where needed.
- Evaluate cleaning methods and work performance standards to ensure a more effective and efficient cleaning program.
- Evaluate new products and procedures for cleaning.
- Evaluate work performance against the established cleaning procedures and periodically monitor operations of the staff.
- Provide training, instruction and assistance to ensure assignments are completed accurately and efficiently.
- Periodically inspect buildings and assigned areas for compliance with cleaning programs and standards.
- Continue daily and biannual building inspections each semester.
- Continue to train staff in the proper and efficient operation of the equipment, methods and procedures of the department to ensure assignments are completed accurately and efficiently.
- Continually observe, review, inspect and monitor staff work while in progress and when completed, to ensure the proper use of materials and equipment, and workmanship. Ensure schedules are met and that the work is performed according to plan.
- Review completed work orders to ensure work is completed timely and staff is working efficiently.

Faculty Student Association

- **Executive Offices**
- **Bookstore/Retail Operations**
- **Dining Services**
- **Human Resources**
- **Information Technology**
- **Special Events, Marketing, Licensing**
- **Support Services**

FACULTY STUDENT ASSOCIATION

Introduction

The Fredonia Faculty Student Association, incorporated in 1951, (hereinafter referred to as FSA) is a private corporation governed by the Not-for-Profit Corporation Law of the State of New York. The by-laws of the corporation detail the purpose, meeting requirements, Board of Director responsibilities and specifications for corporation assets and funds.

An Auxiliary Services Corporation exists within most of the SUNY campuses. Each corporation individually holds a contract with their respective campus. The current 5-year agreement between the FSA and the State University of New York at Fredonia expired June 30, 2028. A new 5-year agreement is in process. The contract specifies individual campus activities and services of the corporation. This contract includes physical space and equipment documentation, as well as corporation indemnification of SUNY and the State of New York. In addition, budget requirements and matters of financial reporting are specified. The agreement guidelines include areas of organization, specifying Board composition and structure. Auxiliary services are listed in each agreement with the opportunity for additional services added through an agreement amendment process. Provisions for audit review, funded reserves, and corporate equity guidelines are also specified in the agreement.

Mission Statement

The focus of the auxiliary services provided by the FSA is best described in the corporate mission statement which is as follows:

The mission of the Faculty Student Association is to identify and provide appropriate goods and services that may not be otherwise provided by the State of New York. Central to this effort is the ability to recognize the variety and dynamic nature of the population involved in an attempt to maximize customer satisfaction, while maintaining the financial integrity of the corporation.

The Faculty Student Association focuses on serving the needs of a diverse university community, including a significant on campus residential student population. We accept the challenge that it is our responsibility to provide the proper environment to facilitate and enhance the learning experience.

Along with the mission statement, the Faculty Student Association strives to provide program funds to Fredonia. The program support has steadily increased over the years and FSA has worked to maintain that in a period of declining enrollment. This has been primarily accomplished through a strong capitalization program resulting in new and/or renovated facilities offering contemporary and revitalized services. FSA strives to identify the needs of the entire campus community, while focusing on operating efficiency and appropriate staffing.

Executive Offices

Annual Report

The Executive Offices for the Faculty Student Association include the Executive Director and Controller. The services performed include accounting, cash control, ID card production, along with student meal plan and FREDCard services, and all general administrative functions for all FSA operations and activities including Human Resources and Information Technology Services.

The Executive Office staff consists of eight full-time management employees, three full-time CSEA employees.



FSA Executive Office and Administrative Offices Staff

*From left to right, front row: Eric Johnson, Terri Sutherland, Deb Slate and Sarah D'Amaro
back row: Lucas Catalano, Mike Lewis, Michelle Kowalski, Matt Snyder, Darin Schulz and
William Michalski*

Significant Accomplishments

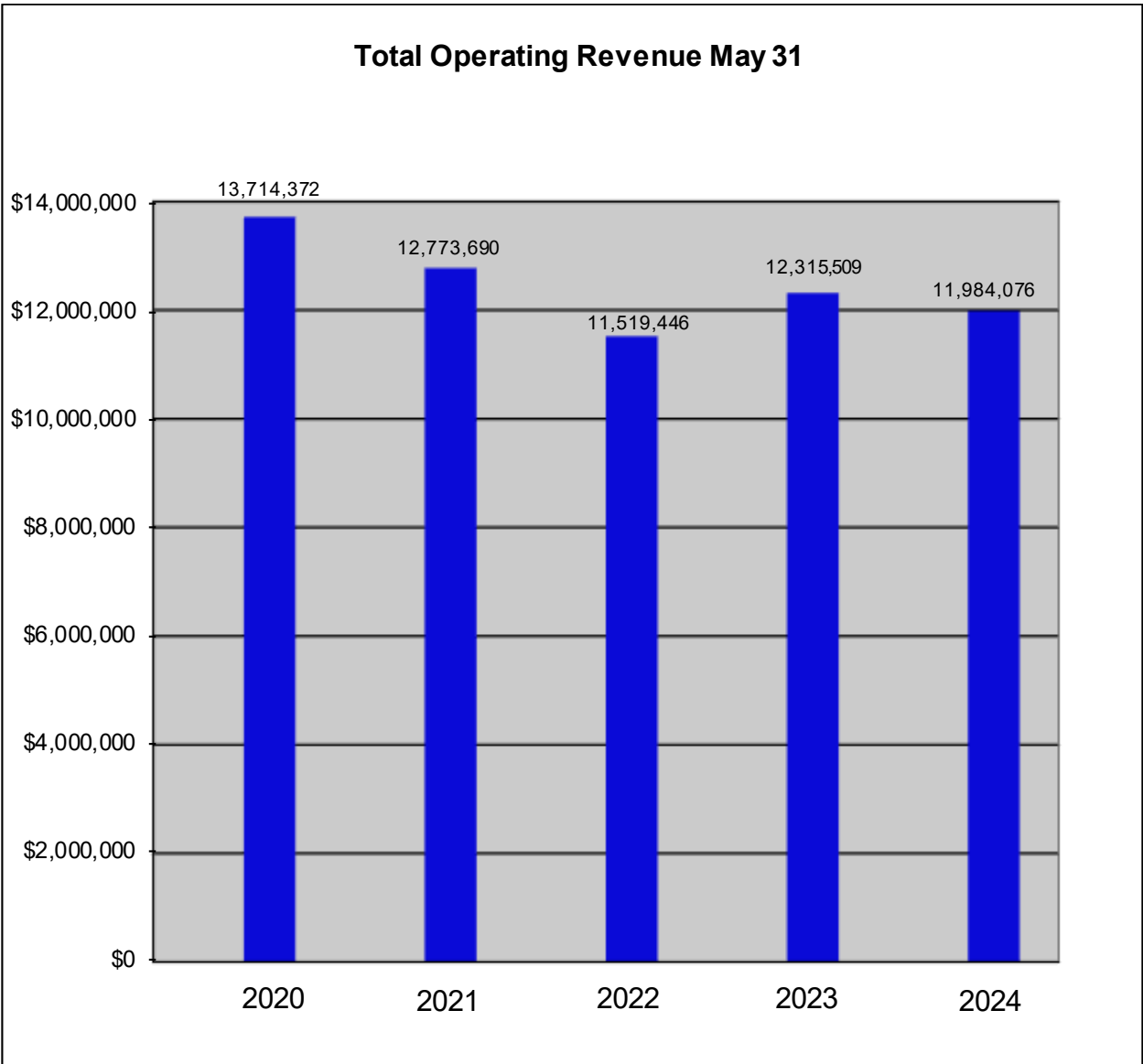
- Provided \$352,887 in support to the Campus in 2023-2024 with \$227,887 in Programs and \$125,000 in Space and Utility support.
- Continued to manage for right sized operations in a fluctuating enrollment environment.
- Developed the 2024-2025 operating budget based on \$11,800,522 in revenue and will return net expenditures in excess of revenue of \$766,055 or negative 6.5%.
- Budgeted a total of \$360,000 of support to the Campus for 2024-2025 with \$235,000 in Program allocations and \$125,000 in Space and Utility charge support.
- Net Assets increased \$217,631 while the budgeted 2023-2024 loss was \$1,112,283. \$1,329,914 better than budget.
- Wages & Benefits were \$745,180 under budget. Managed the filling of open shifts tightly to control labor costs, eliminated two management and one CSEA positions, and a lower experience modifier and lower rates for Worker's Compensation and NYS Unemployment.
- Interest income was \$194,306 greater than budget. Invested excess cash on hand in higher yielding short term US Treasuries.

Statistical Data

- Revenue from operations totaled \$11,385,893 representing a 5.1% decrease from the previous year.
- Operating expenses totaled \$11,637,196 which is an 8.5% decrease from the previous year.
- Program expenditures, serving 37 campus groups and organizations, totaled \$227,877.

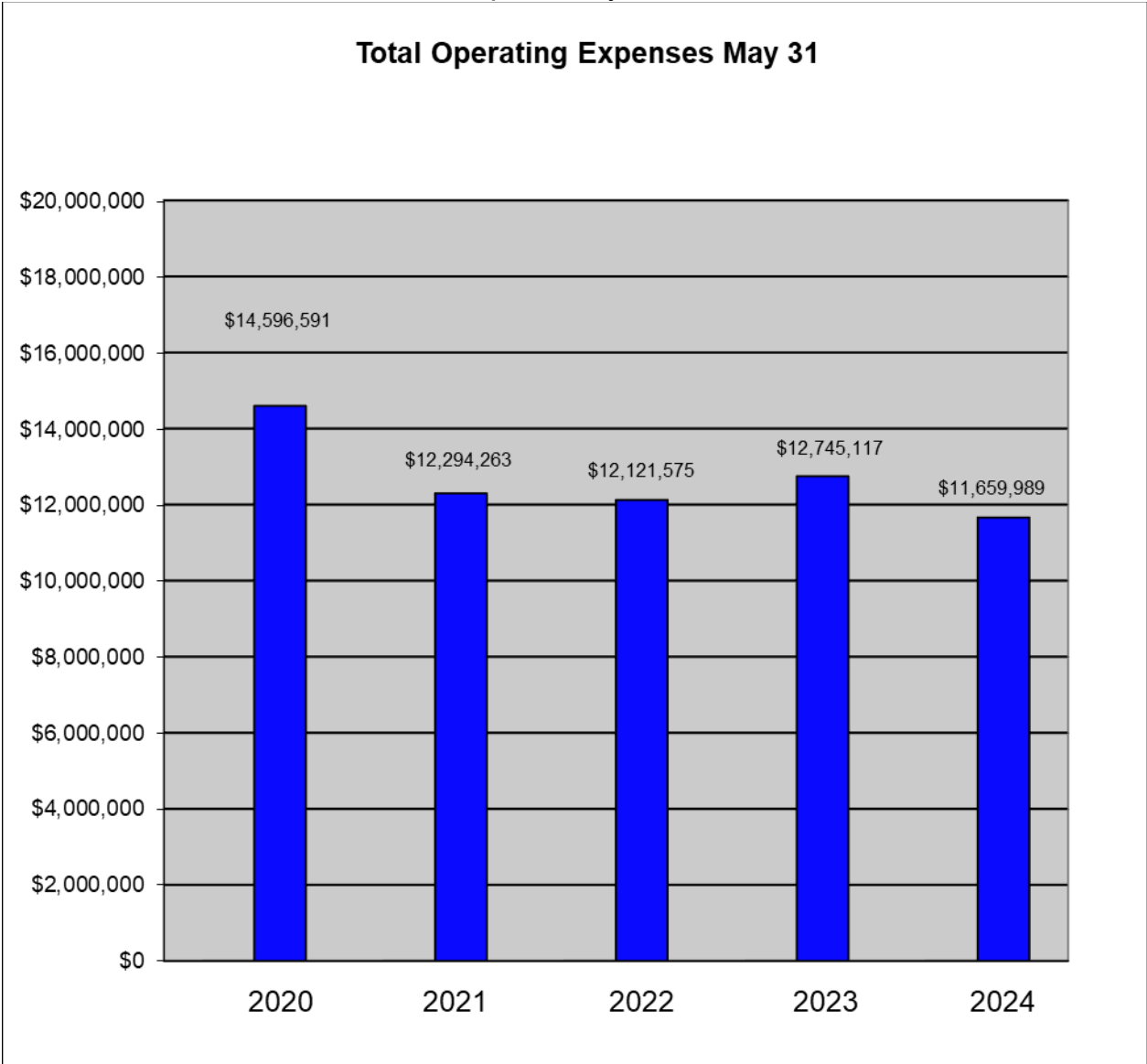
FACULTY STUDENT ASSOCIATION OF STATE UNIVERSITY COLLEGE AT
FREDONIA, NEW YORK, INC.

The following chart represents total FSA operating revenue by year for each of the
past five years:



FACULTY STUDENT ASSOCIATION OF STATE UNIVERSITY COLLEGE AT
FREDONIA, NEW YORK, INC.

The following chart represents total FSA operating expenses by year for each of the
past five years:



Assessment Update

Assessment Statement

The annual independent audit resulted in an unqualified audit opinion. FSA's internal control structure is appropriate based on the auditor's evaluation. Therefore, no management letter comments highlighting deficiencies and recommended improvement actions were issued. The annual budget was reviewed in depth with the Audit/Budget Committee of the FSA Board prior to unanimous Board approval.

The above accomplishments reflect the efforts of the FSA to support the academic mission of the University by providing excellent goods and services to support the needs of our customers, while maintaining the financial integrity of FSA.

Assessment Activities

The services performed by the Executive Office include accounting, cash control, ID card production, along with student meal plan and FREDCard services, and all general administrative functions for all of FSA's operations and activities.

Assessment Goals

- Continue to innovate and look for opportunities to improve services.
- Continue to assess internal controls to enhance the financial integrity of the organization and maintain regulatory compliance.
- Enhance corporate marketing to educate the consumer and grow revenue.
- Continue to evaluate the appropriate level of services to effectively provide services to the campus while maintaining fiscal responsibility.
- Continue to work with SUNY to obtain and maintain compliance with SUNY and New York State initiatives and regulations.

Bookstore/Retail Operations

Annual Report

The University Bookstore offers a variety of merchandise for the campus community including textbooks, course materials, study aids, and gifts. Located on the first floor of the University Commons, FSA offers a multi-operation Bookstore, Convenience Store, and a Starbucks that enables us to meet the requirements of Fredonia's dynamic residential population. The facility is designed to be a flexible retail outlet that adapts to Fredonia's changing needs.



Bookstore/Retail Operations Staff

From left to right: Karie Pencek, Mary Gier and Jeff McMinn

The Bookstore's greatest challenges are with the decline in textbook adoptions and sales, online textbook orders, open educational resources (OER) and the decline in the textbook pre-pack program.

The Bookstore operates a full-service Starbucks that accepts all methods of tender associated with the Bookstore, as well as Starbucks proprietary gift cards and campus meal plans. Starbucks also offers a line of associated giftware.

Retail Operations also oversees vending machine operations throughout campus that are sub-contracted to Continental (formerly The Cuyahoga Group). Retail Operations handles a majority of the service calls and other customer service issues with vending.



Starbucks Staff

From left to right, front row: Melissa Smith, Evelyn Thompson, Emma Fiebelkom; back row: Alexis Salmeron, student workers

The Bookstore, Convenience Store, and Starbucks Coffee staff currently consists of six full-time management employees, four full-time CSEA employees, eight part-time CSEA employees, and twenty-eight part-time student employees.

Significant Accomplishments

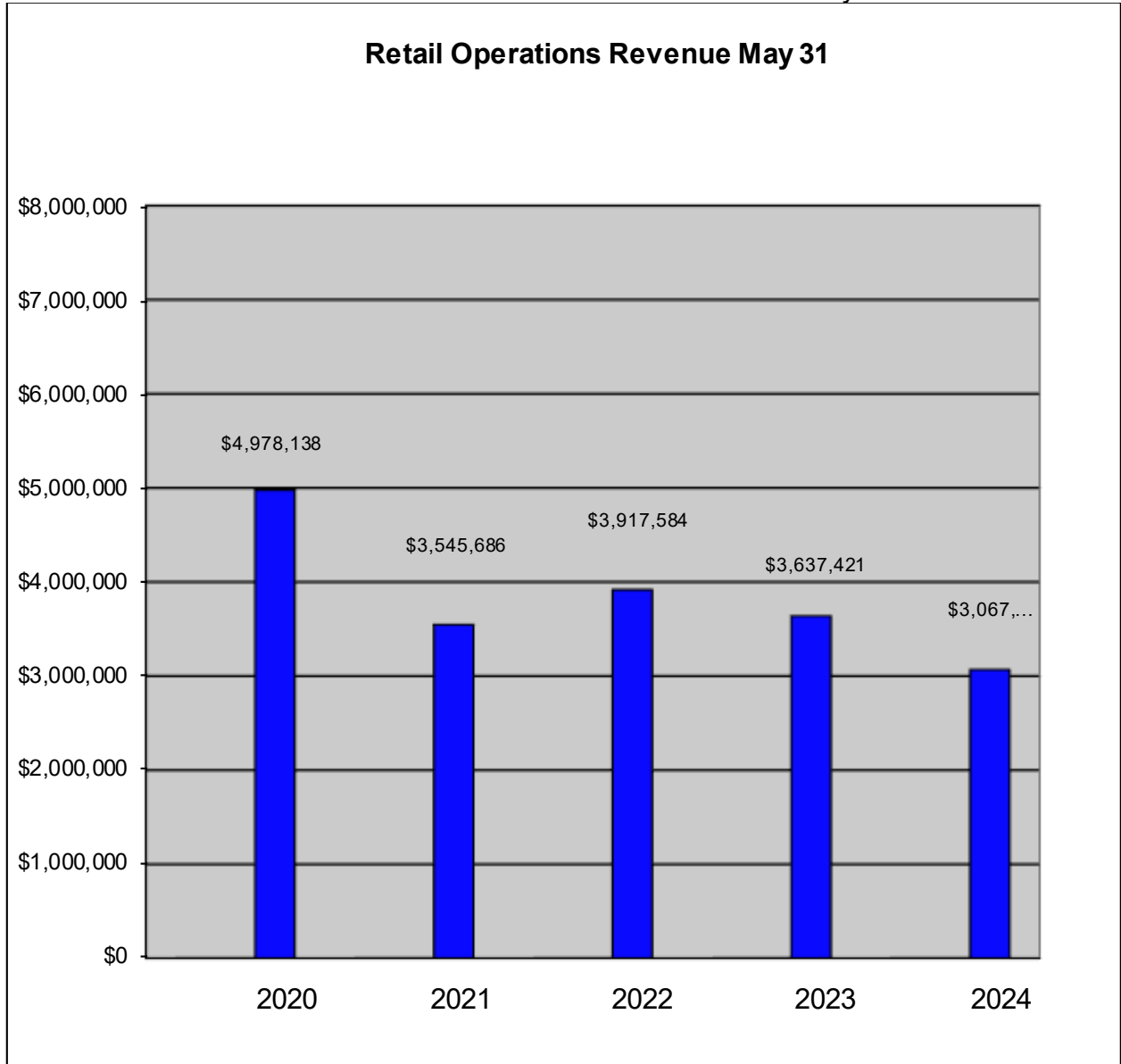
- Increased product line for giftware, electronics, clothing, and school supplies.
- Ensured that all vendors of imprinted merchandise complied with the University Trademarks and Licensing Program.
- Increased sustainability efforts throughout the Bookstore, Starbucks and the Convenience Store to include recycling of all consumables as well as stocking environmentally friendly products when possible.
- Maintained mandates outlined in the Federal Higher Education Opportunity Act.
- Increased product mix from local vendors.
- Refined student package service.
- Enhanced student laptop purchasing program.
- Refine vending machine placement and product mix.
- Increase marketing and social media presence.
- Switched to Akademos for contracted textbook fulfillment as of May 31, 2023.

Statistical Data

- Revenues for the 2023-2024 fiscal year were \$3,067,443 compared to \$3,637,421 in 2022-2023, a decrease of 15.7%.
- FREDFund Accounts decreased by 2 participants to 394 in fall 2023, from 397 in fall 2022.
- Net Revenues decreased \$189,966 or 10.4%.
- Operating expenses decreased \$44,631 or 2.4%.

FACULTY STUDENT ASSOCIATION OF STATE UNIVERSITY COLLEGE AT
FREDONIA, NEW YORK, INC.

The following chart represents total FSA operating revenue by year for each of the past five years which includes Convenience Store, Starbucks, and the University Bookstore. FREDExpress and Tim Hortons up to May 2024. Textbook sales subcontracted in fiscal year 2024



Assessment Update

Assessment Statement

The above accomplishments reflect the efforts of the FSA to support the academic mission of the University by providing excellent goods and services to support the needs of our customers, while maintaining the financial integrity of FSA.

Assessment Activities

Monthly accounting reports are reviewed and assessed in depth for all matters relating to the cost of goods and labor.

The Bookstore stocks a variety of textbooks, study aids, course supplies, and miscellaneous merchandise to help enable the general college population to acquire the materials needed to attain the highest standards of excellence in education. It is the Bookstore's goal to provide these goods and services in a convenient manner using the widest variety of product lines possible. A standing FSA Board Bookstore Committee reviews all relevant matters.

The Bookstore has strived to maintain adequate stock on all required course supplies in order to meet the above assessment activities. Providing needed materials is essential to enable students to achieve their personal and intellectual growth.

The retail operations will continue to evolve the product lines and the services that are offered focusing on healthy alternatives. The Convenience Store will be taking a more active role in promoting healthy choices with an increased variety of fresh fruits, healthy entrees, vegan and organic selections. Online presence will continue to be enhanced at www.fredoniabookstore.com. This site not only offers textbooks and general merchandise, but allows the store to comply with the federal Higher Education Opportunity Act.

Assessment Goals

The assessment goal of the Bookstore is to identify the appropriate product mix to meet customer demands.

- Assess space utilization of store and warehouse.
- Assess product selection to reflect the needs of the Fredonia campus.
- Evaluate student employee training procedures for the store and Starbucks and revise as needed in order to increase annual retention rates.
- Maintain compliance with the college-licensing program.
- Maintain compliance with the Higher Education Opportunity Act.
- Decrease lead time between ordering and receiving of imprinted merchandise.
- Enhance Fredonia imprinted merchandise with increased selection. Work with vendors to decrease minimum orders allowing for less investment in inventory.
- Continue to search for environmentally friendly general merchandise options for the Bookstore.
- Enhance online shopping presence and marketing efforts offering new and innovative products to the Fredonia students, faculty, staff and alumni.
- Explore and increase product mix from local vendors.
- Refine OER program.
- Refine campus shipping and delivery program for students.
- Evaluate replacement bookstore POS system.
- Increase marketing and social media presence.
- Plan for new Starbucks initiatives.

Dining Services

Annual Report

FSA Dining Services is dedicated to enhancing the quality of life for the University community. Reflecting the Fredonia Vision Statement and the FSA Auxiliary Corporate Mission Statement, Dining Services strives to provide quality food and exemplary service for a diverse community, while maintaining the financial integrity of the division.

Focus on customer service and flexible meal plans allows customers to concentrate on their academic endeavors. A variety of menu selections and dining options reflects the individual needs of a diverse campus population. The continued success and growth of Dining Services requires a vision that combines an efficient and effective operational strategy with a clear understanding of the needs of our customers and employees, combined with strategic marketing of our goods and services.

The Dining Services staff consists of eight full-time management employees, eleven full-time CSEA employees, thirty-seven part-time CSEA employees, and 135 part-time student employees.



Cranston Marche Staff

From left to right, front row: Cindy Korzeniewski, Jeanette Guziec, Joshua Priolette, Zachary Panek, Jason Domènico; back row: Densil Wilson, Gary Sutter, Robert Geffert, Makaila Townsend, Joshua Priolette and Marcie Sievert



Willy C's Staff

*From left to right, front row: Sharon Domst, Cheryl McCoy, Rita Zambotti, Janice Tubbs;
back row: Felicia Nowak, Allison Kozlowski, Dolores Mauer and Richard Tompkins*



Café McEwen

From left to right: Karen Fisk and Andrea Velez



Café Mason

From left to right: Heike Magdowski Hawker and Kacie Weaver

Significant Accomplishments

- FSA Dining Services planned the following events for fall 2023: we featured our annual Welcome Back Hot Dog Tent, "Paint Cranston Pink" for National Breast Cancer Awareness October 13th, Harvest Celebration (Thanksgiving) on November 14th, Customer Appreciation Cupcake Tree December 7th (UC Lobby) and A Celebration of Holidays on December 12th in Cranston Marche.
- For spring 2024, FSA Dining Services organized the following events: A perennial favorite, our Valentine's Dessert Day on February 14th, MLB Opening Day March 28th, Solar Eclipse Day April 8th, and our annual "Paint Cranston Purple Day" National Cancer Awareness April 18th and 19th.
- Cranston Marche remained in step with evolving college food trends while faithfully serving its beloved "Burger Wednesday" and "Cheesy Friday" weekly menu specials.
- The Willy C's food court offers a diverse array of college favorite cuisines, convenient seating options, and a vibrant atmosphere for an enjoyable dining experience.
- Catering services excels in delivering exceptional food quality, impeccable presentation, and outstanding customer service.

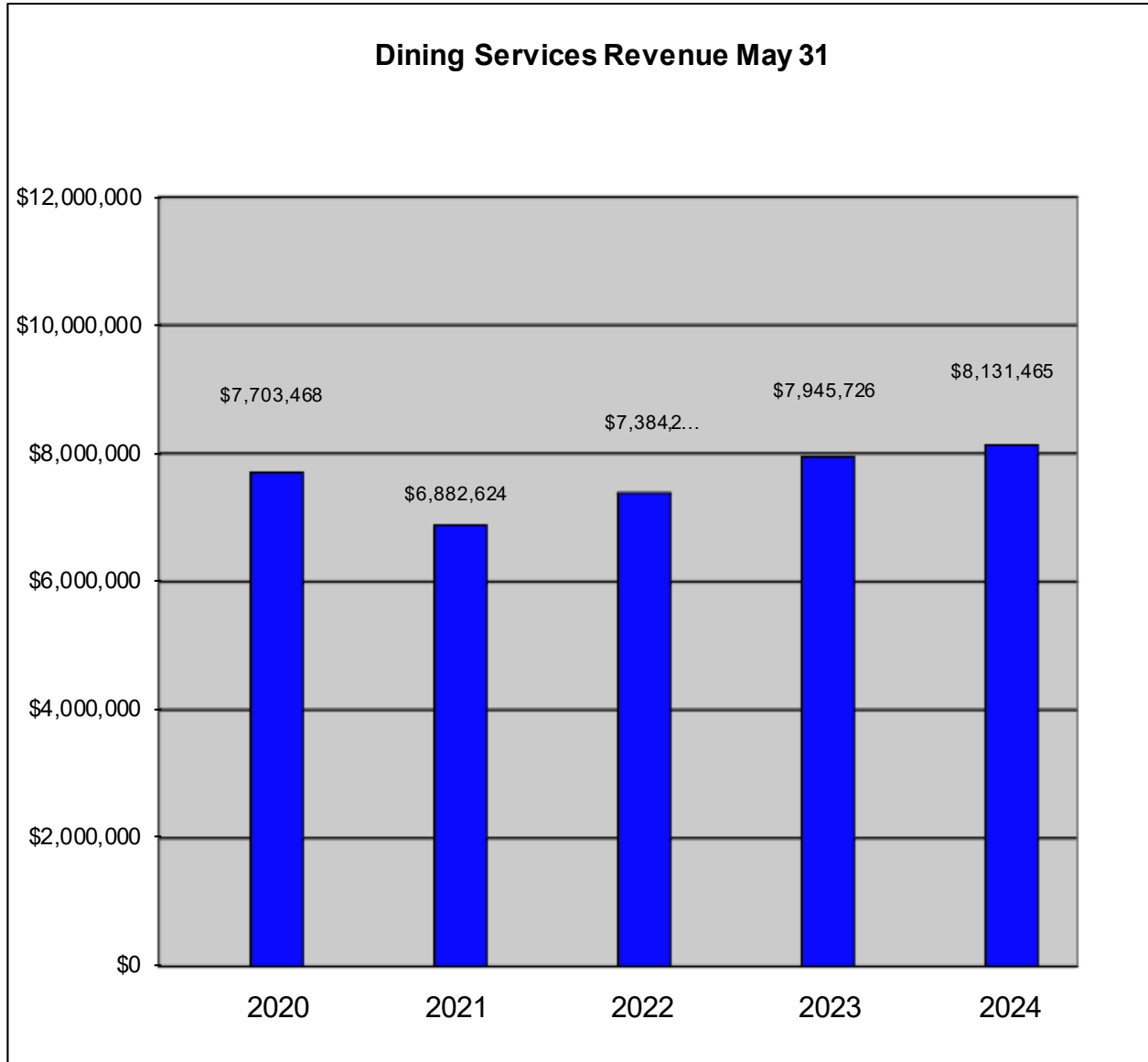
- Campus cafes provide a welcoming environment, quick service, and a variety of fresh and affordable food and beverage options for students, faculty and staff.
- FSA Dining Services started offering Team Building Cooking Classes in the fall 2023 for athletic teams, student groups and summer groups that provide participants with essential life skills while encouraging collaboration, communication, and time management as they create delicious, nutritious meals. Utilizing the old Tim Horton's Kitchen space.

Statistical Data

- Self-operated Dining Services revenue for the 2023-2024 fiscal year was \$8,131,465 compared to \$7,945,726 in 2022-2023, an increase of 2.3%.
- Meal plan enrollment decreased by 77 participants to 1,665 in fall 2023, from 1,742 in fall 2022. A 4.4% decrease.
- Net Revenues increased \$245,516 or 4.1%.
- Operating expenses decreased by \$309,302 or 6.6%.

FACULTY STUDENT ASSOCIATION OF STATE UNIVERSITY COLLEGE AT
FREDONIA, NEW YORK, INC.

The following chart represents total FSA Dining Services operating revenue by year for each of the past five years which includes Catering, Willy C's, Cranston Marche, and FSA Cafes & Concessions. Blue Devil Grill up to May 2022.



Assessment Update

Assessment Statement

Management is directed to constantly monitor food and service quality, unit cleanliness, and employee productivity.

Regular inspections are conducted by the Chautauqua County Health Department to assure compliance with all areas of Dining Services, as it applies to the New York State Sanitary Code.

Customer comment cards and emails are reviewed, assessed, and answered in an effort to evaluate all consumer-based observations and requests as they reflect our recognition of the varied needs of our diverse clientele. All management staff is encouraged to engage customers on a daily basis for input, including daily interaction with student customers who are also staff members.

Various unit staff meetings are scheduled on a regular basis to examine and evaluate all issues relative to dining services and its customers.

Planning initiatives are routinely reviewed for immediate and long-term performance.

The above accomplishments reflect the efforts of the FSA Dining Services to support the academic mission of the University by providing excellent goods and services to our customers, while maintaining the financial integrity of FSA.

Assessment Activities

Based upon routine customer and employee input, many dining service suggestions were implemented, improving customer satisfaction.

Evaluated and fine-tuned all menus to provide a variety of choices for the diverse campus clientele, including healthy options.

Assessment Goals

The assessment goals for Dining Services focus on maximizing customer satisfaction while stressing efficiency and achieving budgetary goals.

- Evaluate how to best serve students seeking gluten friendly food preparation.
- Creatively meet the challenge of increased volume in all Cafés through staff training and necessary enhancements in the infrastructure.
- Continue to fine tune Café menus for freshness and popularity.
- Maintain menu integrity and portion control in Blue Devil Grill to accurately reflect retail counterparts.
- Maintain current positive catering operations through efficient operations and adding more outside catering to increase revenue.
- Market all units to increase customer awareness via various media.
- Continue prompt and thorough responses to comment cards and emails.
- Develop more sophisticated food and labor cost monitoring and control tools.

Human Resources

Annual Report

The Human Resources (HR) staff currently consists of one full-time management employee (considered part of the Executive Office). The HR department is responsible for the staffing of management, CSEA, and student employees. Responsibilities include interpretation of contract, employee handbooks, and policies and procedures and federal and state law. Also performs payroll functions and administers retirement plans, health insurance, and dental plans for Management, CSEA and Student employees, as well as Worker's Compensation, NYS Disability, NYS Sick Leave, NYS Paid Family Leave, ADA and FMLA.

The FSA Corporation consists of fifty-five full-time management and CSEA employees, fifty-five part-time CSEA employees, and 158 student employees.

Significant Accomplishments

- Provided training to all employees on PCI Compliance, Sexual Harassment, and Diversity, Equality, and Inclusion.
- Maintained Wage Theft Prevention Act Compliance.
- Recognition of Students of the Month and Student Leaders
- Recognized years of service, birthdays, anniversaries, perfect attendance
- Enacted a new Employee Recognition Program
- Completed orientation for all new CSEA, student and management employees.
- Monitored DOL Unemployment Claims.
- Maintained Facebook Page for FSA employees to provide information as well as recognition.
- Completion of ACA Forms 1095 and 1094.
- OSHA and EEOC reporting.
- Provided individual training/orientation sessions for all new student employees.
- Certification obtained in Society of Human Resources Management as a Certified Professional in Human Resources
- Combined two payroll companies into one
- Started Electronic timesheets and time off requests for Management Employees
- Posted employment policies on Paylocity website
- Provided Fredonia email addresses to all CSEA employees to be able to expand communication
- Revamped the Manager Health Insurance Retirement Program
- Started work on offering Independent Health in addition to Highmark as health insurance options

Statistical Data

- Hired multiple new employees.

Assessment Update

Assessment Statement

The above accomplishments reflect the efforts of the FSA Human Resources to support the academic mission of the University by providing personnel to deliver the goods and services to support the needs of our customers in the most efficient and cost-effective manner.

Assessment Activities

- Meet with management staff to review employee policies and procedures outlined in employment handbooks and the union contract.
- Meet with Worker's Compensation insurance representatives to provide a safe work environment.
- Perform ongoing inspections of work locations regarding the proper labeling for new materials including input to the Material Safety Data book.
- Review of monthly unemployment experience rating to ensure compliance.
- Assure Department of Labor Compliance by posting information for the Wage Theft Prevention Act as well as all other Federal and State required postings.
- Perform NYS New Hire Reporting with health insurance eligibility requirements.
- Ensure proper payment of wages and deductions for all employees.
- Maintain confidentiality of all employee personal information and data.
- Submit monthly payroll data to the US DOL Bureau of Labor Statistics.
- Ensure pension contributions are properly submitted.
- EEOC and OSHA reporting.
- Provide information for employees to speak/meet with TIAA representative.

Assessment Goals

- The assessment goal of Human Resources is to become a resource base for all FSA operations to increase efficiency.
- Meet with all new employees to review Employment Handbook, Contract, Safety Manual, and job descriptions.
- Meet with each employee annually to increase employee awareness of individual benefits including, retirement, SRA, health insurances and EAP programs.
- Develop training program to ensure all new employees are properly trained in all areas.
- Remain up to date on current procedures and retirement options, and work with TIAA representative to provide information in regards to individual counseling to employees.
- Review examinations for all CSEA positions that require testing.
- Research educational opportunities for Management Staff.
- Provide continued training and protective equipment to decrease work related injuries such as cuts, burns, trips and falls.
- Continue to collaborate with other SUNY HR Professionals
- Monitor Fair Labor Standards Act (FLSA) changes to ensure compliance.
- Provided assistance to employees who will be receiving new SUNY Fredonia email addresses
- Provide support to management staff navigating leaves of absence from work, as well as maintaining consistency with all employees
- Assist management staff through disciplinary processes with employees
- Review benefit structure for vacation and sick accruals, and retirement benefits

Information Technology

Annual Report

Information Technology (IT) strives to support and further develop the use of technology within FSA for organization and campus-wide utilization. During this process, we continue to evaluate current processes to increase efficiency and productivity. With endless possibilities, Information Technology is always excited at the opportunity to advance the use of technology throughout FSA and the campus.

The Information Technology staff currently consists of two full-time management employees (considered part of the Executive Office).

Significant Accomplishments

- Replaced Odyssey PCS Interface Development Kit (No Longer Supported) with RESTful API and re-wrote all related interfaces for processing meal plan and FREDFunds plan enrollments.
- Moved FSA website over to campus website and set up data feed for dynamic dining menus and hours of operations.
- Replaced/upgraded network firewall.
-

Statistical Data

- 3557 add-on online deposits totaling \$162,575.03 through the MyFREDCard.com/CBORD GET sites.
- 476 Help Desk tickets submitted.

Assessment Update

Assessment Statement

The above accomplishments reflect the efforts of the FSA to support the academic mission of the University by providing the technology required to support the needs of our customers in the most cost-effective manner.

Assessment Activities

The IT Committee, comprised of the FSA Executive Director, Associate Executive Director of FSA and Controller, Director of Retail Operations, Director of Information Technology, and FSA IT staff, continues to review the technology needs of FSA, addressing issues as they arise and plan for hardware/software expansion and upgrades. The IT Committee has placed a system of checks and balances related to the IT Unit, sharing with its members the details needed to fully understand the issues at hand in order to make thoughtful decisions.

Assessment Goals

The assessment goal of Information Technology for next year is to improve technology that directly enhances services offered to students.

- Improve formal documentation of standard operating procedures.
- Work with business units to help facilitate improved data flow and consistency.
- Streamline processes and information where needed/requested.

Special Events, Marketing, Licensing

Annual Report

This department is focused on the image of FSA, its operations and overseeing all areas of marketing, public relations, conferences, and licensing. It is the department's responsibility to maintain a clear understanding of the programs, policies and procedures within FSA and the campus community.

This department is staffed with one full-time management employee and one full-time CSEA employee.



Special Events

From left to right: Katie Thies and Kim Fancher

Significant Accomplishments

- Coordinated the planning and implementation of all marketing for the 2023-2024 Academic year special events and promotions.
- Presented to Parents, at the summer 2023 sessions hosted by new student and transition programs.
- Continued communication with the NYSSSA (New York State Summer School for the Arts) office in Albany reminding them that that Fredonia remains ready and willing to host the programs if funding gets restored.
- Continued involvement as emeritus of Chautauqua Leadership Network (CLN).
- Reconnected with ACCED-I (Association of Collegiate and Conference Events Directors-International) colleagues, and attended the annual conference in Providence, RI, in March of 2024 to learn what is new within the industry and earn credits towards my next CCEP (Collegiate Conference Events Professional) recertification.
- Assisted with the planning of the campus Solar Eclipse event on April 2, 2024, by organizing food trucks and working with vendors for product and merchandise giveaways. This event was well received by the campus community.

Statistical Data

- For summer 2023, we hosted 10 in person summer residential programs on campus
- Non-residential programs included the Special Olympics, graduations, 3 local dance studio performances and, 4 FREDReady days.
- 9 total events held at the College Lodge that included weddings, a baby shower, meetings, campus department retreats, overnights and outdoor adventures
- 67 Licensed Vendors

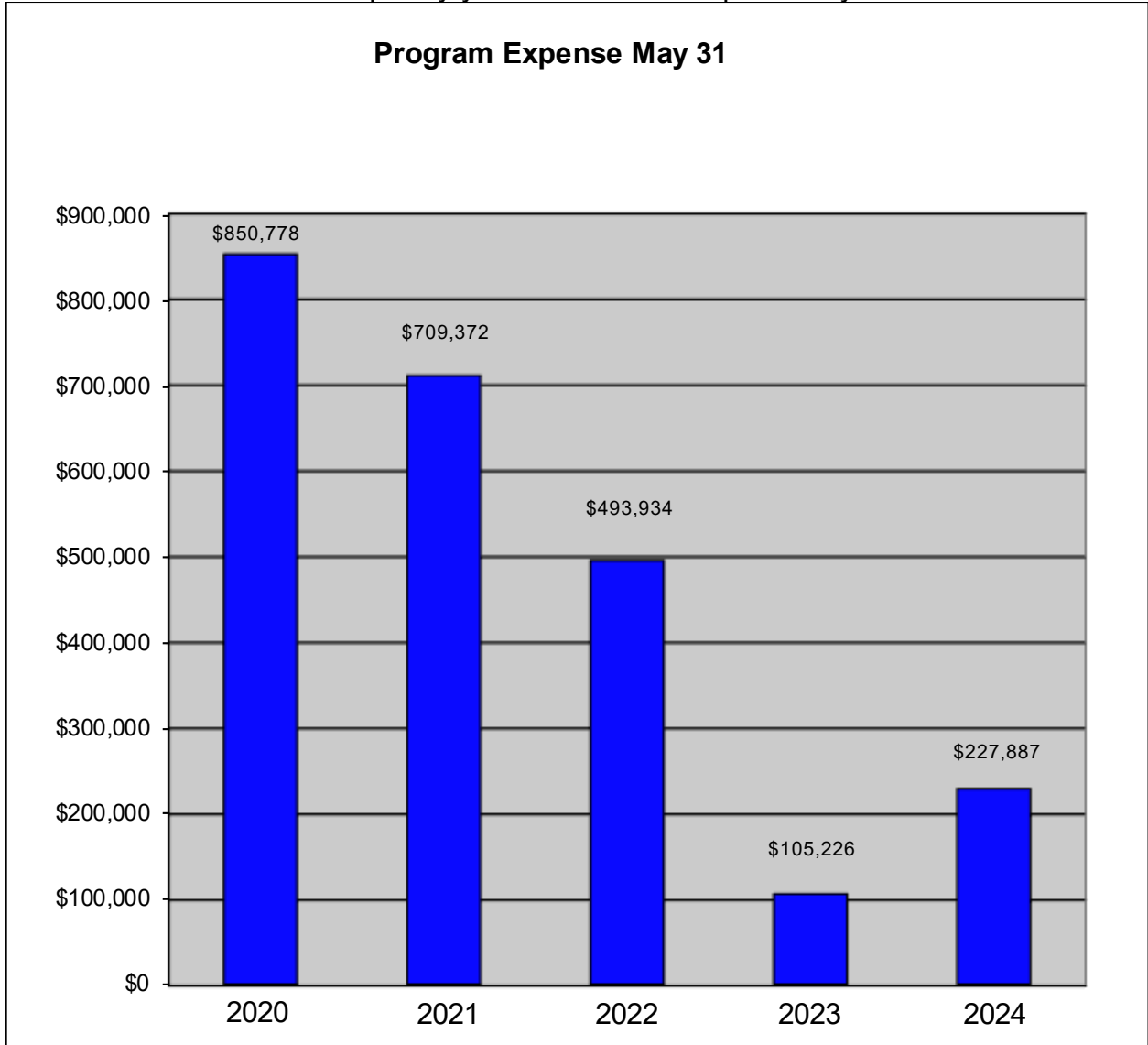
Assessment Update

Assessment Statement

The above-mentioned accomplishments reflect the efforts of FSA to support the academic mission of the University by providing excellent goods and services to support the needs of our customers, while maintaining the financial integrity of FSA.

FACULTY STUDENT ASSOCIATION OF STATE UNIVERSITY COLLEGE AT
FREDONIA, NEW YORK, INC.

The following chart represents total FSA Programs supporting 45 to 50 activities annually on campus by year for each of the past five years:



Assessment Activities

Worked closely with unit management to promote and encourage participation in Dining Services and Retail Operations promotions and special events.

Regular monitoring of licensing procedures has helped to promote the production and sale of Fredonia merchandise, both on and off campus. During the 2023-2024 fiscal year we saw a decrease in Fredonia's royalties due in part to enrollment still being low. The Campus Trademarks and Licensing committee continues to work to find best practices with the continuity and use of our brand.

Encouraged open communication with all faculty and staff via the Special Events Committee to ensure all campus departments have the information necessary regarding the status of summer programming during the summer.

Assessment Goals

- Continue to market all FSA operations.
- Continue to promote the College Lodge for summer events such as weddings and retreats. Remain active with the Chautauqua County Visitors Bureau (CCVB) promoting the Lodge as a location for outdoor activities as well.
- Continue to provide and strengthen the conference coordination needs of the campus community and outside clients through membership in the Association of Collegiate Conference and Events Directors – International (ACCED-I) by attending a variety of seminars, sessions and workshops offered at regional educational forums, virtually and the annual conference.
- Continue to foster relationships with faculty and staff via the Special Events Committee and other campus constituents to ensure a successful campus experience for our conference groups.
- Continue to monitor, provide training, and approve the numerous needs of Trademarks and Licensing by licensed and non-licensed vendors, our students, and the campus community.
- Develop creative advertising to inform the entire campus community about the many services available throughout our campus, and continue to collaborate with other members of the State Auxiliary Services Association (SASA) Marketing group, both at in person meetings, zoom calls, and via email.
- Assist other FSA management with the continual need to inform students of any changes, additions, and deletion of policies and procedures regarding the services we provide.
- Continue hosting student interns through the Career Development Office, to provide an experiential learning environment for students across all majors.
- Remain an active member of the Chautauqua Leadership Network (CLN) by providing support for the growth of other Fredonia members in the CLN network.

Support Services

Annual Report

Support Services adapted to the major changes in operations brought on by the ever-changing desires of the students. Additional products and services, varied delivery schedules to maintain fresher product, and increased demand stretched our resources. Demand in the cafes and food service increased the food production in Central Prep. New menu items and higher demand of sandwiches for grab-and-go were very popular.

The Support Services group continued with two full-time management employees, twelve full-time CSEA employees, eight part-time CSEA employees and four student employees.



Support Services/Commissary Staff

Significant Accomplishments

- Completed more than 500 work orders.
- Cleaned and maintained all FSA operated facilities.
- Provided Experiential Training for 485 participants in 2019-2020, which reflected a decrease from the previous year. Groups that have booked with us in the past have seen decreases in funding, or dates did not work to host the event during the 2020-2021 year.
- Continued to expand operations of Central Prep by adding new items in our cafes, and the Convenience Store, including healthy choice snacks and sandwiches, and the production of salads for Willy C's to present a consistent product to our customers.
- Continued to evaluate all purchased products from our supplies to decrease the cost of producing bakeshop goods and menu items.
- The Lodge solar panels continue to produce power to reduce the cost of electricity at the Lodge. Their success has resulted in the Lodge getting off demand pricing, and the electric bills could be close to eliminated based on our current usage and production.
- Continued to fine tune the Cleaning department schedule.
- Successfully transitioned a management role as a result of an employee retirement.
- Partnered with a local Boy Scout troop on additional Eagle Scout projects that will improve the trail system with a second informational map kiosk and blazing of trails.
- Cable TV was discontinued as of May 31, 2023.
- Three dual port EV charging stations were installed.

Statistical Data

- Revenues from Support Services for 2023-2024 totaled \$195,727 compared to \$429,180 in 2022-2023, which is a decrease of 54.4%.
- Operating expenses increased 51.6%.

Assessment Update

Assessment Statement

The previously mentioned accomplishments reflect the efforts of FSA to support the academic mission of the University by providing excellent goods and services to support the needs of our customers, while maintaining the financial integrity of FSA.

Assessment Activities

The Support Services unit coordinates formal inspections by the Chautauqua County Health Department, New York State Fire Inspectors, New York State Department of Labor, New York State Department of Environmental Conservation, and Fredonia's Environmental Health and Safety and Sustainability Department, to assure compliance in all necessary areas.

Assessment Goals

Support Services will continue to anticipate and react in a positive and timely manner to the challenges of the University.

- Implement a management plan at the College Lodge that takes into account the biological survey currently being conducted and the concerns of the campus community.
- Continue to market the property for weddings and receptions.
- Update menu choices to meet the ever-changing demands of our customers and maintain product freshness.
- React in a timely manner to meet our customers' expectations.
- Assist in the renovation of our buildings and equipment to meet the changing demands of our customers.
- Expand additional fresh baked items and menu items into the Convenience Store, Willy C's, and the Cranston Marche.
- Provide Concessions to certain SUNY Fredonia sporting events in our Break Away and Time Out Cafes.
- Come up with additional vegan and gluten free options for Cranston Marche and the Cafes as the demand for these items increases. This includes adding new items to the recently added Gluten Friendly station at Cranston Marche.

Internal Control

INTERNAL CONTROL

Introduction

The Internal Control Department comprises the plan of organization and all of the coordinate methods adopted within the University to safeguard its assets, check the accuracy and reliability of its accounting data, promote operational efficiency, and encourage adherence to prescribed managerial policies. Although the Internal Control Department currently consists only of the Director of Internal Control, the objectives of internal controls are the responsibility of all campus employees.

Mission Statement

The mission of Fredonia's Internal Control Program is to ensure compliance with the New York State Internal Control Program and to ensure campus operating practices and procedures are sufficient to minimize the possibility of operational failure, theft, fraud, compromised data, or other actions inconsistent with policy and/or in violation of law. Fredonia's Internal Control Program is designed to review, critique, and provide improvement opportunities to strengthen the University's existing systems and procedures.



Amy Beers

Annual Report

The internal control function originated with the inception of the “New York State Governmental Accountability, Audit and Internal Control Act, Chapter 814 of the Laws of 1987.” It is designed to ensure that this University meets its mission, promotes performance leading to effective accomplishment of objectives and goals, safeguards assets, checks the accuracy and reliability of financial and other key data, promotes operational efficiency and economy, and encourages adherence to applicable laws, regulations and prescribed managerial policies, guidelines and procedures. Internal controls are defined as operating practices, reporting relationships, and procedures that individual departments and the University as a whole have adopted to achieve goals and objectives and to avoid the loss or misuse of assets. When followed, internal controls reduce the likelihood that errors or irregularities will occur that could prevent the successful achievement of such goals and objectives.

Specific activities under the direction of the Director of Internal Control include performance and evaluation of vulnerability assessments for Fredonia-identified high risk areas, internal control reviews of SUNY-specified high risk areas, investigations into situations warranting internal control review/audit, periodic paycheck audits for the purpose of reviewing employment and payroll procedures, periodic review of authorized cash handling/cash collection sites, and periodic review of procurement card and travel card activity. The Director of Internal Control is the TouchNet Marketplace Chief Administrator, the campus Records Access Officer (Freedom of Information Law; FOIL), the campus Enterprise Risk Manager (ERM), the campus Child Protection Policy Point Person (CPPPP) and the campus Records Management Officer (RMO). In addition, all new IFR custodians are trained on the proper handling of funds. The Director of Internal Control is responsible for the development of, and proper dissemination of, Finance and Administration-specific policies and assists with the development and dissemination of policies that are the result of relevant committee work.

Annual required reporting to the SUNY Office of the University Controller includes the preparation of the Internal Control Program Status Report, the Internal Control Certification signed by the President in response to Division of Budget (DOB) Policy B-350, the Office of the State Comptroller (OSC) Accounts Payable Advisory #28, and the annual Internal Control Program letter from the President to all employees of the campus.

In addition, the Director of Internal Control is responsible for security administration of the Office of the State Comptroller (OSC), SUNY, NYS Department of Civil Service, Statewide Financial System, TouchNet Marketplace, NYSTRS, and the NYSLRS online systems. The Director of Internal Control chairs the campus-wide Internal Control Committee. The Director is also the co-chair of the campus-wide Information Security Committee, and the chair of the E-Discovery Response Team in addition to being an active member on various other campus-wide committees, including but not limited to the PCI-DSS Subcommittee, Building Safety Coordinators, Honorary Degree Committee, Finance and Administration Strategic Planning Committee and other task forces as assigned throughout the year. The Director of Internal Control is an active member of the SUNY Records Management Officers Shared Services Group and a participant of NYALGRO and NYSICA.

Significant Accomplishments

- Assisted in the facilitation of Information Security Committee meetings.
- Assisted in follow-up of improvement opportunities identified in the CampusGuard audit of PCI-DSS compliance.
- Maintained a fully functioning Internal Control Program and followed the established timeline for major events.
- Commenced one scheduled Internal Control review.
- Successfully submitted responses to 56 FOIL requests as well as follow-up requests and appeals.
- Reviewed cash handling procedures in several departments.
- Maintained and expanded the TouchNet Marketplace by successfully developing over 200 uStores and six uPay sites to date, totaling over 92,000 transactions and \$11,400,000.00 in transacted funds, to date.
- Assisted in training the campus in the requirements of the Child Protection Policy; currently serving as the Child Protection Policy Point Person (CPPPP).
- Currently acting as the campus Enterprise Risk Manager (ERM).
- Acted as a consultant for FOIL and Advisory 28 for other western consortium campuses

Statistical Data

MARKETPLACE TENDER SUMMARY REPORT JULY 1, 2023 – JUNE 30, 2024							
	Credit Card	Signature Debit	ACH	Cash	PayPath	Bank Wires	Total
Amount	569,066.06	306,829.67	81,376.90	0.00	0.00	0.00	957,272.63
Count	3,348	4,125	197	0	0	0	7,670
% Amount	59.45%	32.05%	8.50%	0.00%	0.00%	0.00%	
Credit Card							
Card Type	<u>Credit Card</u>		<u>Signature Debit</u>		Credit Card Merchant Total		
	Count	Amount	Count	Amount			
Visa	1,765	318,552.40	2,876	211,109.68			529,662.08
MasterCard	1,050	217,518.69	1,248	95,669.99			313,188.68
Discover	328	17,602.25	1	50.00			17,652.25
AmEx	205	15,392.72	0	0.00			15,392.72
Total	3,348	569,066.06	4,125	306,829.67			875,895.73
ACH							
Standard Entry Class		Count		Amount			
WEB		197		81,376.90			

Assessment Update

Assessment Statement

The Internal Control Department ensures the ability of the University to pursue its mission and effectively accomplish its goals and objectives by safeguarding its assets, verifying the accuracy and reliability of financial and other key data, and encouraging adherence to applicable laws, regulations, standards and prescribed managerial policies and practices.

Assessment Activities

In recognition of the requirements and recommendations provided by a variety of agencies (e.g. COSO — The Committee of Sponsoring Organization of the Treadway Commission, New York State, New York State Division of Budget, the Office of the State Comptroller, and SUNY) for Fredonia's Internal Control Program, we have maintained and built upon the formalized schedule previously set forth.

This has been accomplished through the development of, and follow through on, comprehensive lists to identify individual components for each of the Internal Control Program's priorities as well as projected timelines for several years into the future for these priorities. The Schedule of Internal Control Activities used as our guiding document has also undergone revision to better communicate the status of various scheduled and unscheduled assignments to the Internal Control committee and ultimately the Department of Budget and the campus President. In addition to responding to the requirements for structure and documentation of the Internal Control Program, this schedule also serves to emphasize the continuity of this Program by immediately providing for establishment of a projected timeframe for follow-up.

Throughout the past fiscal year, mandatory internal control reviews of pre-determined high-risk areas, paycheck audits, and other activities were conducted or commenced as noted above. Recommendations were issued where weaknesses were identified and/or improvement opportunities noted. Timelines for implementation of recommendations were established with individual departments along with projected timeframes for follow-up by Internal Control. Implementation of these recommendations reduces the likelihood that errors or irregularities will occur that could prevent the successful achievement of campus goals and objectives. All review findings and recommendations were also included in the Internal Control Summary that accompanied the Internal Control Certification signed by the President. The OSC Accounts Payable Advisory # 28 was completed, which required certification of the adequacy of controls over the payment process in Purchasing and Accounts Payable, certification of the controls over campus voucher authorizers and regular voucher payments, controls over travel related payments, System access controls, and review of SUNY BI reporting.

Assessment Goals

- Increase awareness of our Internal Control Program.
- Conduct program reviews as required by System Administration.
- Oversee random reviews of Procurement Card, NET Card and Travel Card activity.
- Oversee paycheck audits at various locations across campus.
- Provide training for new IFR custodians on the proper handling of receipts; provide "refresher" information to established IFR custodians.
- Provide timely responses to situations warranting internal control review.
- Develop and administer campus-wide training on Internal Control via KnowB4.
- Attend applicable conferences, trainings, seminars and meetings.
- Present at conferences, trainings and seminars, as requested.
- Continue to develop TouchNet Marketplace uStores and uPay sites in which campus departments will have the ability to sell approved products and services online. Identified locations of applicability include, but are not limited to, the following:
 - School of Music
 - Lifelong Learning and Special Programs
 - Reed Library
 - Theatre & Dance
 - RAC
 - Career Development Office
 - Student Health Center

- Campus Life
- University Police
- Finance and Administration
- School of Education
- Facilities Services
- Facilities Planning
- Faculty Student Association
- English Department
- Student Accounts
- Intercollegiate Athletics
- Registrar
- International Education Center
- Graduate Studies
- Communication Disorders & Sciences
- Admissions
- Computer Science Department
- Field Experiences
- History Department
- Accounting Office
- Professional Development Center
- Environmental Health and Safety and Sustainability
- College Foundation
- President's Office
- Residence Life
- Human Resources
- Research Foundation
- EOP
- Student Association
- Fredonia Technology Incubator
- Youngerman Center
- Psychology Department
- Sociology Department
- School of Business
- Ticketing Office
- ENACTUS and other student groups
- Visual Arts and New Media
- International Student Services
- Science Center
- Campus Committees

University Police

UNIVERSITY POLICE

Introduction

Our commitment to the University is to help create and maintain an atmosphere which enhances the educational process and allows the total mission of the University to be accomplished without fear or interruption. Inherent in this effort is ensuring the safety and wellness of all persons connected with or present at the University.

At the State University of New York (SUNY) at Fredonia University Police Department (UPD), we aim to accomplish our mission by showing kindness, empathy, and honesty in every interaction with the members of the community we serve. We embrace and celebrate the diversity of our campus, and we work hard to ensure we exhibit professionalism and respect to all. We view campus policing from a supportive and caretaking perspective, not a punitive one, especially with our students. Our very low crime rate demonstrates our approach is effective.

We achieve our mission through two main efforts. *Community policing* is emphasized to foster trust and build positive relationships among members of the campus community and UPD. *Continual training* is pursued to ensure our police officers and dispatchers have the knowledge, skills, and tools to effectively provide emergency assistance to campus members in need. As detailed herein, SUNY Fredonia's crime rate is very low, due in large measure to the continuing bonds of trust and cooperation between the campus community and the UPD. Communities who trust their law enforcement agencies are much more likely to form partnerships that work to keep the community safe.



UPD's unique and proactive program to prevent targeted violence on our campus sets us apart from most college campuses around the United States. SUNY Fredonia UPD operates with the understanding that nearly all acts of targeted violence are preceded by observable, concerning behaviors by would-be offenders. Accordingly, SUNY Fredonia UPD conducts training seminars and presentations on campus to educate our campus community members on how to

identify and report persons engaged in concerning behaviors. UPD partners with the Students of Concern Team to take affirmative steps to identify, assess, and mitigate threats to our campus community before those threats turn into acts of targeted violence.

This annual report is presented in an effort to highlight the work of the SUNY Fredonia UPD. We hope it provides readers with an understanding that our campus is an extraordinarily safe place to learn, live, and work.

Toward the end of fiscal year 2023 and entering into the fiscal year 2024 UPD's staffing was changed. UPD is currently staffed by the following personnel:

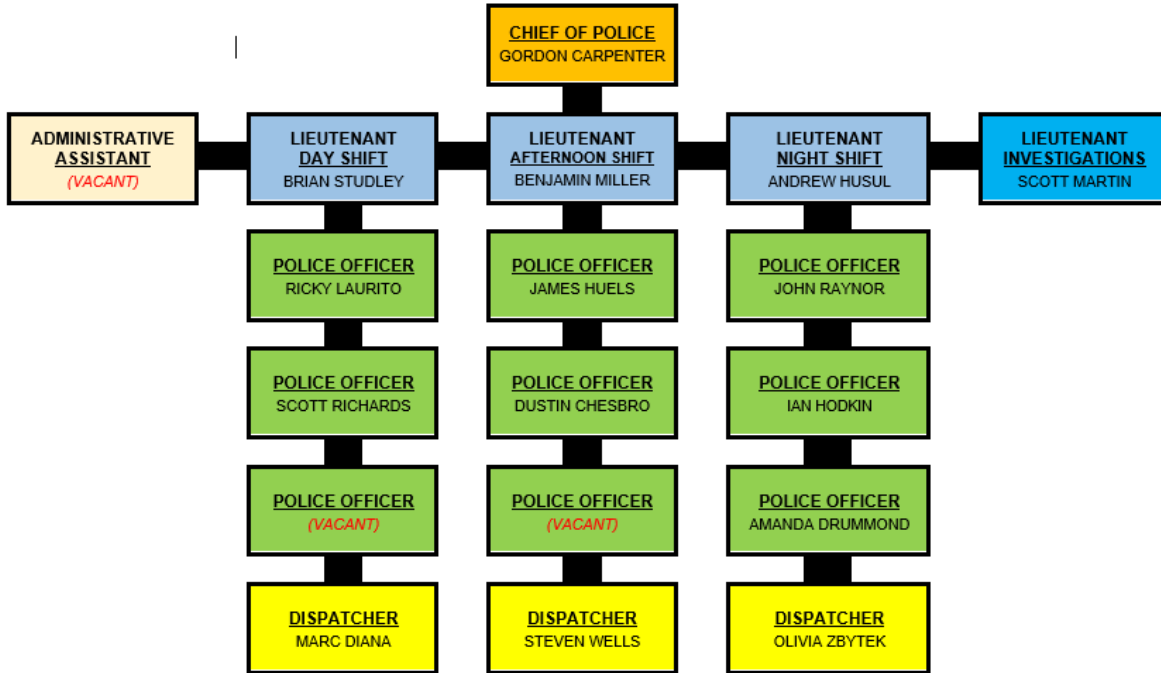


ORGANIZATIONAL CHART

UNIVERSITY POLICE DEPARTMENT



2ND FLOOR, GREGORY HALL
716.673.3333
FAX: 716.673.3462



Mission Statement

The mission of the New York State University Police Department at Fredonia is to provide leadership and commitment to the community, to enforce the law with fairness, dedication, and integrity, and to maintain a safe and secure community for all.

Annual Report



Significant Accomplishments

- UPD attained re-accreditation from the New York State Law Enforcement Accreditation Council in March 2024. The Office of Public Safety in the Division of Criminal Justice Services noted that SUNY Fredonia's participation in the accreditation program "*demonstrates the commitment you (SUNY Fredonia UPD) and your officers have to providing the highest level of service and professionalism to the community you serve.*"
- UPD continued its community policing program, engaging with students in frequent pleasant and friendly interactions outside of calls for service. Officers conducted hundreds of foot patrols across campus, in academic buildings and residence halls with the express purpose of connecting with students in non-emergency situations. Officers also conducted presentations on a variety of topics to further enhance student engagement.
- To enhance the community policing initiative, UPD procured four (4) police bicycles at no cost to develop and implement a bicycle patrol program.
- UPD was awarded a \$91,000 grant through the New York State Department of Criminal Justice Services to enhance equipment and training for members of UPD.
- UPD provided presentations and training to students, faculty, and staff on how to recognize and report concerning behaviors that might indicate a person is planning an act of targeted violence.

Statistical Data

During the 2023 fiscal year, our officers logged a total of 4491 incidents. An incident is defined as any action taken by our officers. These can be self-generated, such as traffic stops, property/area checks, calls for service from members of the community, or non-emergency community policing patrols. A subset of the crime statistics for *calendar* year 2023 are shown below, and they demonstrate the exemplary year-to-year safety posture of the campus.

FBI Index Crimes

Criminal Offenses	On Campus (includes residence halls)			On Campus Student Housing			Non-Campus Buildings			Public Property		
	2021	2022	2023	2021	2022	2023	2021	2022	2023	2021	2022	2023
Murder/Nonnegligent Manslaughter	0	0	0	0	0	0	0	0	0	0	0	0
Negligent Manslaughter	0	0	0	0	0	0	0	0	0	0	0	0
Sex offenses*												
Rape	7	4	12	2	4	12	0	2	3	0	0	0
Fondling	0	0	0	0	0	0	0	0	0	0	0	0
Incest	0	0	0	0	0	0	0	0	0	0	0	0
Statutory Rape	0	0	0	0	0	0	0	0	0	0	0	0
Robbery	0	0	0	0	0	0	0	0	0	0	0	0
Aggravated Assault	0	0	0	0	0	0	0	0	0	0	0	0
Burglary	4	4	1	3	4	1	0	0	0	0	0	0
Motor Vehicle Theft	0	0	1	0	0	0	0	0	0	0	0	0
Arson	1	0	0	0	0	0	0	0	0	0	0	0

**In 2014 forcible sex offenses were split into two categories: rape and fondling.*

It should be noted that the “rape” category includes all reported or alleged incidents involving sexual violence, including student-student dating violence.

Liquor, Drug, and Weapon Arrests

	On Campus (includes residence halls)			On Campus Student Housing			Noncampus Buildings			Public Property		
	2021	2022	2023	2021	2022	2023	2021	2022	2023	2021	2022	2023
Liquor Law Violation (does not include DWI)	2	2	11	1	1	11	0	0	0	0	0	0
Drug Law Violations	0	0	6	0	0	6	0	0	0	0	0	0
Illegal Weapons possession	2	2	0	0	0	0	0	0	0	0	0	0

Liquor, Drug, and Weapon Disciplinary Action/Judicial Referral

	On Campus (includes residence halls)			On Campus Student Housing			Non-Campus Buildings			Public Property		
	2021	2022	2023	2021	2022	2023	2021	2022	2023	2021	2022	2023
Liquor Law Violation (does not include DWI)	10	9	11	9	9	11	0	0	0	0	0	0
Drug Law Violations	11	11	6	11	12	6	0	0	0	0	0	0
Illegal Weapons possession	1	0	0	0	0	0	0	0	0	0	0	0

Assessment Statement

University Police at Fredonia is a fully accredited New York State (NYS) law enforcement agency, widely regarded as the “gold standard” in ensuring a highly professional police department. The majority of NYS law enforcement agencies have not achieved accreditation. To achieve and maintain accreditation, UPD-Fredonia scrupulously collects data on the department’s work, including calls for service, criminal investigations, evidence control, administration, operations, personnel training and certifications. In all, accredited NYS law enforcement agencies must maintain up to date documentation that 111 different standards are met by the department. Every five years, the NYS Law Enforcement Accreditation Council audits police departments in a painstaking effort to ensure strict compliance with all 111 accreditation standards. UPD-Fredonia was re-accredited in March 2024.

UPD-Fredonia publishes on its website an annual “Campus Security and Fire Safety Report”, which summarizes the work done by UPD-Fredonia and it’s on and off campus partners to keep our campus community safe. This report, mandated by federal law, provides detailed data on crime trends on our campus that show SUNY Fredonia is an extraordinarily safe place to learn, live, and work. For a more comprehensive understanding of UPD-Fredonia’s work and the statistical data on crimes that we collect, readers are encouraged to review the [Campus Security and Fire Safety Report](#) online.

Assessment Activities

- UPD will continue to develop and standardize UPD-Fredonia’s violence prevention program to make detecting and reporting concerning behaviors a part of the campus culture.
- UPD will further develop innovative community policing activities to develop trusting relationships among our students and our officers. This will include UPD participation in campus events to bring students and officers together in fun, engaging situations. The overall purpose of these efforts will be to increase the likelihood that students will quickly report concerning or emergency situations to UPD for resolution.
- Continue to collaborate with local and regional law enforcement partners to share information, intelligence, and resources to effectively address and mitigate crime, safety trends, and quality of life issues.
- UPD will continue to operate with fiscal responsibility without impacting the quality of service provided by applying for applicable federal, state, local and private grants as they become available along with working with the private sector on community and crime prevention programs and initiatives.

Assessment Goals

- UPD will continue to expand its officer training curriculum to include enhancing skills in de-escalation, mental health crisis response, tactical scenarios, crisis management, and leadership.
- UPD will continue to conduct an internal review of departmental processes to maintain the NYS Law Enforcement Accreditation Council Program standards.
- UPD will continue to promote an environment of open communication that fosters trust and legitimacy throughout the campus community.

Department reallocation

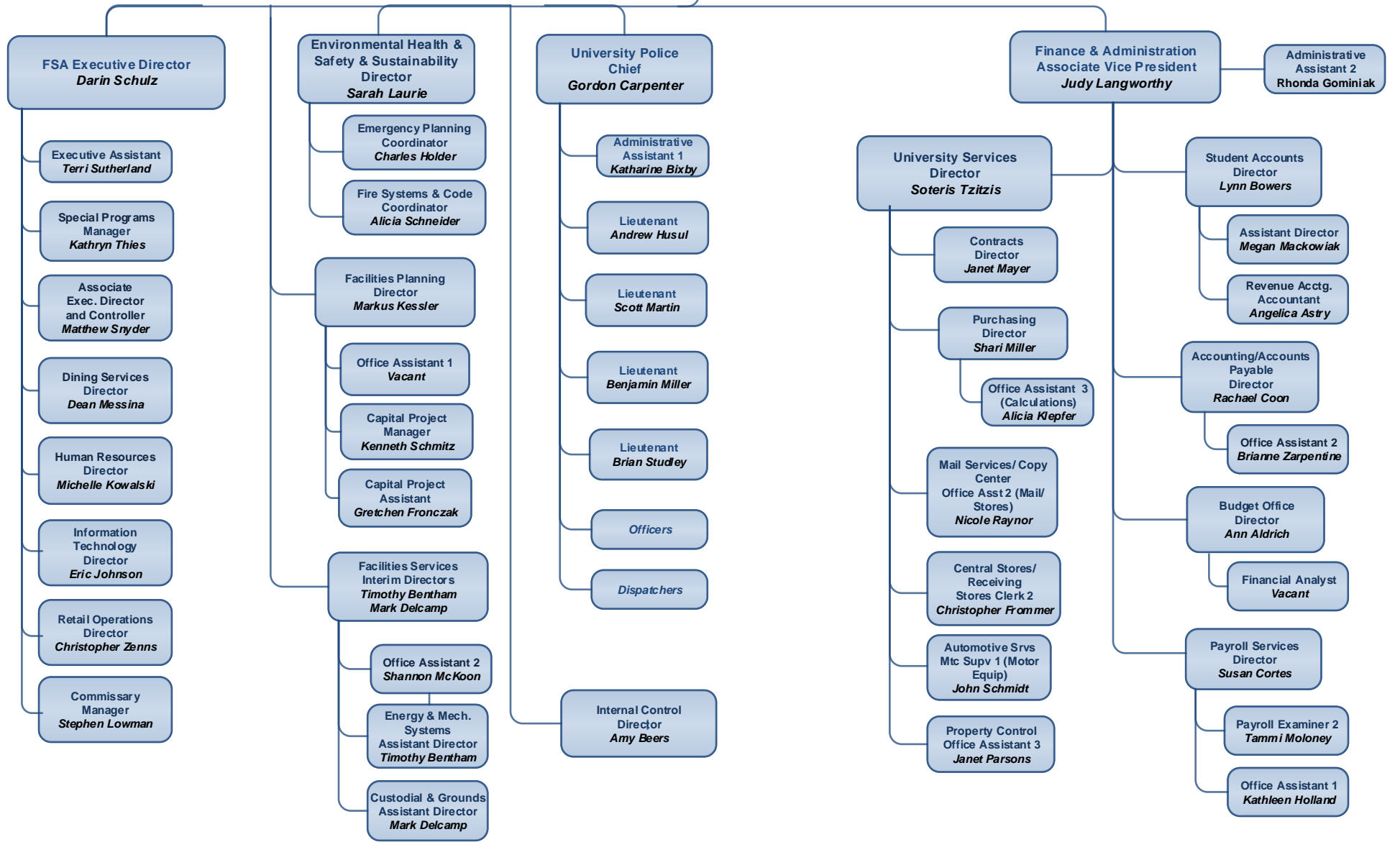
Effective July 1, 2024, the University Police Department was moved under Student Affairs, reporting directly to the Vice President of Student Affairs.

Appendix A

- **Organization Chart**

Finance and Administration

Vice President for Finance and Administration
Vacant as of 04/01/24



Appendix B

- **Fredonia Mission Statement**

Mission Statement

Fredonia educates, challenges, and inspires students to become skilled, connected, creative, and responsible global citizens and professionals. The university enriches the world through scholarship, artistic expression, community engagement, and entrepreneurship.

ACKNOWLEDGEMENTS

CONTRIBUTORS

Associate Vice President for Finance and Administration

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Rachael Coon, *Director of University Accounting*
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Janet Mayer, *Director of Contracts*
Shari Miller, *Director of Purchasing*
Soteris Tzitzis, *Director of University Services*
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Facilities Planning

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Facilities Services

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Timothy Bentham, *Assistant Director of Energy and Mechanical Systems*
Mark Delcamp, *Assistant Director of Facilities Custodial Services, Grounds and Landscaping*
Rich Newton, *Head Grounds Supervisor*
Rodney Hayes, *Electrical Supervisor*
Nelson White, *Plumbing Supervisor*
James Kuras, *Structural Trades Supervisor*
Gary Hardy, *Plant Utilities Supervisor*
Shannon McKoon, *Office Assistant 2*

Faculty Student Association

Darin R. A. Schulz, *Executive Director of FSA*
Matthew Snyder, *Associate Executive Director of FSA and Controller*
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Michelle Kowalski, *Director of Human Resources*
Eric Johnson, *Director of Information Technology*
Stephen Lowman, *Commissary Manager*
Dean Messina, *Director of Dining Services*
Katie Thies, *Special Programs Manager*
Christopher Zenns, *Director of Retail Operations*

Internal Control

Amy Beers, *Director of Internal Control*

Marketing and Communications

Lori Deemer, *Graphic Designer*

University Police

Gordon Carpenter, Chief of Police

Katie Bixby, Administrative Assistant 1

ADMINISTRATIVE AWARD WINNERS

2024

Katie Bixby – Administrative Support
Gretchen Fronczak – Professional
Daniel Halas – Trades
Jeffrey Deering – Custodial
Roberta Loomis – FSA

2022

Alicia Klepfer – Administrative Support
Charles Holder – Professional
Gary Hardy – Trades
Erin Ransom – Custodial
Robert Graham – FSA

2020

Nikki Raynor – Administrative Support
Sandy Noble – Professional
Randy Grant – Trades
Hector Figueroa – Custodial
Cindy Korzeniewski – FSA

2018

Jody Myers – Administrative Support
Jen Costa – Professional
Rodney Hayes – Trades
Linda Nixon – Custodial
Linda Kurgan Monaco – FSA

2016

Shannon McKoon – Administrative Support
Sue Cortes – Professional
Don Dillenwburg – Trades
Bob Miller – Custodial
Diane Mekus – FSA

2014

Debbie Desmond – Administrative Support
Matt Snyder – Professional
Herb Farner – Trades
Susanne Valentine – Custodial
Christine Sipp – FSA

2012

Cindy Haase – Administrative Support
Lynn Bowers – Professional
Larry Pelz – Trades
Gladys Lockett – Custodial
Ron Mirek – FSA

2023

Tammi Moloney – Administrative Support
Donn Smeragliuolo – Professional
Jim O'Connor – Trades
David Racker – Custodial
Karie Pencek – FSA

2021

Joan Schnur – Administrative Support
Katie Brown – Professional
Steve Gromala – Trades
Elizabeth Goblirsch – Custodial
Jeannette Guziec – FSA

2019

Leah Betts – Administrative Support
Sarah Laurie – Professional
Natalio Matias – Trades
Sara Jagoda – Custodial
Cheryl McCoy – FSA

2017

Becky Siragusa – Administrative Support
Ann Aldrich – Professional
Nelson White – Trades
Nick Valentine – Custodial
David Lewis – FSA

2015

Janet Parsons – Administrative Support
Fred Tripp – Professional
John P. Schmidt – Trades
Iris Rosa – Custodial
Sharon Hogg – FSA

2013

Lori Johnson – Administrative Support
Lisa Marrano – Professional
James Kuras – Trades
Jorge Rosa – Custodial
Millie Stanton – FSA

2011

Robyn Reger – Administrative Support
Bill Michalski – Professional
Paul Siebert – Trades
Sue Smith – Custodial
Pat Wilde – FSA