

2013 • 2014

FINANCE AND ADMINISTRATION



ANNUAL REPORT AND ASSESSMENT UPDATE 2013-2014 FISCAL YEAR

VICE PRESIDENT FOR FINANCE AND ADMINISTRATION
LIZ PRAETORIUS



Vice President for Finance and Administration

December 9, 2014

To: The Campus Community

On behalf of the entire division, I'm pleased to present the 2013-2014 Finance and Administration Annual Report and Assessment Update. The Finance and Administration division is comprised of nine departments, which include 40 distinct operating units and 378 employees. This is the 17th 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 12 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. Secretarial/Clerical
2. Custodial Services
3. Professional Trades
4. FSA Operational Services
5. Professional Staff (FSA and University)

The front cover of the 2013-2014 Annual Report and Assessment Update features three of the winners of the 2014 Outstanding Administrative Services Awards. Beginning at the top left and going clockwise are:

Debbie Desmond—Outstanding Administrative Services Award—Secretarial/Clerical

Debbie, a Clerk in Student Accounts, retired in October 2014. She began at Fredonia in August 1994 as a temporary Clerk. Debbie resides in Dunkirk.

Herb Farner—Outstanding Administrative Services Award—Professional Trades

Herb has been employed at Fredonia since March 2011 when he began as a Plant Utilities Assistant. He is currently a Plant Utilities Engineer 1 in HVAC. Herb is a resident of Irving.

Matt Snyder—Outstanding Administrative Services Award—Professional Staff

Matt began his career at Fredonia with FSA in January 2004 as the Controller. He is currently the Associate Executive Director of FSA and Controller. Matt resides in Fredonia.

There were two additional Outstanding Administrative Service Awards presented as follows:

Susanne Valentine—Outstanding Administrative Services Award—Custodial Services

Susanne has been employed at Fredonia since April 1991, when she began in the Custodial department. She is currently a Janitor in Athletics. Susanne is a resident of Dunkirk.

Christine Sipp—Outstanding Administrative Services Award—FSA Operational

Christine has been employed at Fredonia in FSA since September 1989. She currently works in the Commissary area of FSA as a Cleaner/Laundry Worker. Christine resides in Fredonia.

Thank you to everyone in the Finance and Administration division who contributed to the preparation of the 2013-2014 Annual Report and Assessment Update, and congratulations to all of the 2014 Outstanding Administrative Service Award winners. A summary of all the Outstanding Administrative Service Awards winners from the past 12 years is presented on the inside of the back cover of this report. The Finance and Administration division welcomes your comments and suggestions on the presentation and content of this annual report. We look forward to working with everyone throughout the University during the 2014-2015 academic year, and to continually assess and improve our delivery of services to the University.

Sincerely,



Liz Praetorius
Vice President for Finance and Administration

State University of New York at Fredonia
Finance and Administration

Annual Report and
Assessment Statement

July 1, 2013 – June 30, 2014

STATE UNIVERSITY OF NEW YORK AT FREDONIA

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

July 1, 2013 – June 30, 2014

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INTRODUCTION

This 2013-2014 edition of the ***Finance and Administration Annual Report and Assessment Update*** represents the 17th 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.

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



From left to right, seated: Becky Nalepa, and Liz Praetorius; in back: Robyn Reger and Karen Porpiglia

The over-arching goal of the Finance and Administration Division is to support the Fredonia Vision 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 complete Fredonia Vision Statement is included in Appendix B.

The Finance and Administration Division is comprised of nine departments with 378 employees. A brief summary of the responsibilities of the nine 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), and the Office of the New York State Comptroller (OSC) (4.0 FTE Employees).

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 the Controller, which includes the functions of the offices of University Accounting, Purchasing, Student Accounting and Revenue Accounting; the Budget function, and University Payroll Services (23.0 FTE Employees).

3. Environmental Health and Safety

This department is responsible for all environmental and safety training as well as compliance oversight. The Environmental Health and Safety Office serves as campus liaison with all environmental and safety regulatory organizations and assists with campus emergency planning and training. This office also plays a major role in the coordination of the campus sustainability program (3.0 FTE Employees).

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 (5.0 FTE Employees).

5. Facilities Services

This department is responsible for all campus maintenance functions and many smaller sized construction projects. The department is comprised of five units which include: Office Operations; the Capital Projects, Energy and HVAC unit which consists of Building Automation Systems, Project Management and HVAC/R (Heating Services / Refrigeration / Air Conditioning); the Custodial Services unit; the Facilities Trades Services unit which consists of Structural Trades, Grounds and Landscaping, and Electrical and Plumbing; and the Technical Services unit (144.50 FTE Employees).

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 (183 Employees - this includes 80 full-time employees and 103 part-time employees).

7. Human Resources Office

This department is responsible for all employment and personnel related issues on campus. The department includes: Employee Relations, new employee Orientation, Employee Benefits, Employee Assistance Program (EAP), position classification, SUNY Human Resources system, employee compensation, ethics compliance, workers' compensation and retirement counseling (6.3 FTE Employees).

8. 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 (1.0 FTE Employee).

9. University Services

This department is responsible for many of the support services provided on campus. The department consists of ten units that include: University Services Office, Central Receiving, Campus Storehouse and Mechanical Storehouse operations, Campus Photocopy services, Campus Mail services, Property Control, University Telecommunication services, University Automotive services, Fleet Vehicle services and the campus Park and Ride express bus service. (8.0 FTE Employees)

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, 2013 to June 30, 2014. 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
2013-2014 Departmental Staffing by Funding Source

Administrative Office	State	DIFR	IFR	SUCF	FSA	Total
Finance and Administration	3.00		1.00			4.00
Environmental Health & Safety	1.60	1.40				3.00
Facilities Planning	1.00	2.00		2.00		5.00
Facilities Services	74.00	64.50	6.00			144.50
Faculty Student Association					183.00	183.00
Financial Services	18.00	2.00	3.00			23.00
Human Resources Office	5.30	1.00				6.30
Internal Control	1.00					1.00
University Services	8.00					8.00
	111.90	70.90	10.00	2.00	183.00	377.80

Notes:

- a) The FSA employment number includes 80 full-time and 103 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. This division includes nine departments with 378 employees. The nine Administrative Departments included in this 2013-2014 Annual Report include:

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



Liz Praetorius

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 human, financial, and physical resources while providing quality customer service and support to students, faculty, staff and campus visitors.

Annual Report

Fiscal year 2013-2014 was a year of transition for the Finance and Administration Division.

The Associate Vice President assumed the role of Interim Vice President for Finance and Administration due to the January 2014 retirement of Vice President Stephen Schillo. The division and the entire campus community thank Karen Porpiglia for serving in this role with a high standard of professional service and dedication.

Liz Praetorius assumed the role of Vice President for Finance and Administration on August 1, 2014 following the conclusion of a national search.

During the 2013-2014 fiscal year, the Vice President's office provided coordination and leadership across the division. The accomplishments and initiatives of each operating area are summarized in the following sections of this report.

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. Tracking measures of output, the use of benchmark data and customer surveys are also part of this discipline. The assessment activities of each department are also summarized in the following sections of this Report. A review of these sections provides a good reflection of the division's accomplishments and assessments for 2013-2014.

Associate Vice President for Finance and Administration

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

ASSOCIATE VICE PRESIDENT FOR FINANCE AND ADMINISTRATION

Introduction

The financial services offices, under the leadership of the Associate Vice President for Finance and Administration, are responsible for all campus financial operations. This unit includes the offices of the Controller (Purchasing, University Accounting, Student Accounts), Budget and Payroll. 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 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.



Karen Porpiglia

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 and internship opportunities. Students are provided hands-on working experience that benefit 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, serving as liaison with SUNY System Administration financial offices, providing oversight for State and residential capital planning and projects, and representing the Finance and Administration Division in the absence of the Vice President.

Specific duties 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 consequence of a revenue shortfall is a dollar-for-dollar reduction in the next year's operating budget, therefore periodic monitoring of actual revenue billed and collected is critical in order to provide timely notification to Cabinet should there be any indication that our revenue target cannot be achieved. Conversely, projected overages require significant monitoring to ensure that budgeted shortfalls are adequately covered. Campus reserve balances must be carefully monitored and managed to effect a financially secure institution.

On an annual basis, ensure the development and timely submission to the Office of Capital Facilities of the campus 10-year Residence Hall Capital Plan, including projected residence hall room rental rates and occupancy, a detailed 10-year revenue and expenditure projection demonstrating the campus's ability to cover debt service associated with 15-yr and 30-yr bonds, as well as revolving loan funds needed to cover planned campus-managed capital projects.

Additional responsibilities include budget development, account analysis, cash management and financial reporting for campus construction projects.

During the second half of the 2013-2014 fiscal year, the Associate Vice President assumed the role of Interim Vice President for Finance and Administration, due to the January 2014 retirement of Vice President Stephen Schillo. Following the conclusion of a national search, effective August 1, 2014, Liz Praetorius assumed the role of Vice President for Finance and Administration.

Significant Accomplishments

- Provided leadership and supervision for the Finance and Administration division from February through July of 2014.
- Provided clear and concise financial, capital construction, facilities and auxiliary service material to guide the Cabinet in institutional decision making and structure the planning assumptions used in preparing the 2014-2015 Operating Budget.
- Successfully managed the 2013-2014 Operating Budget, closing the \$6.6 million gap with a combination of campus reserves, equipment funds, selected fees, salary savings and over-enrollment tuition dollars.
- Lead efforts of the Finance and Administration division to identify \$226,000 of permanent expenditure reductions to assist the campus in closing the projected 2014-2015 State budget gap. Successfully achieved our division's goal of 14.37% of the total institutional target.
- Provided multi-year student service fee revenue and expenditure data to assist the Cabinet in establishing prudent and appropriate 2014-2015 comprehensive fee rates.

- The 18th edition of the Consolidated Operating Budget Book was prepared and posted to the Budget Office website providing an overview of the six components (State Operations, Residence Halls, Faculty Student Association, Income Fund Reimbursable [IFR], State University Tuition Reimbursable [SUTRA], Fredonia College Foundation), as well as planning assumptions and highlights.
- Coordinated the efforts of various Finance and Administration departments in identifying appropriate and adequate space for the new EC English initiative. Established a manageable financial arrangement for the necessary modifications and repairs to satisfactorily repurpose the existing facilities.
- Coordinated the efforts of various Finance and Administration division departments in implementing the rebranding initiative including campus-wide signage, mass-purchase of individual business cards, departmental stationary, and merchandise for the campus retail outlets.
- Worked closely with the System Office of Capital Facilities and coordinated the efforts of the campus financial team to adopt the new methodology for the collection and remittance of residence hall revenue, payment of debt service and funding for new reserve requirements. Monitored monthly Dormitory Income Fund (DIFR) revenue and expenditures and successfully negotiated a negative revenue threshold from the System Controller's Office so as not to impede day-to-day residence hall operations.
- Coordinated the efforts of Facilities Planning, Facilities Services and the State University Construction Fund in administering the Capital Plan. Work on several major state and residential projects was completed/substantially completed including:
 - \$60 million Science Center building
 - \$30 million University Village Townhouse Complex
 - \$1.2 million Igoe Hall Window Replacement
 - \$150 thousand Kirkland Complex Lighting Rehabilitation
 - \$100 thousand Maytum Hall Basement Structural Repairs
- Projects currently under construction include:
 - \$36 million Rockefeller Arts Center Addition
 - \$3 million Elevator Rehab/Upgrade
- Major Projects currently in program study, design or bid phase include:
 - \$30 million Houghton Hall Renovation
 - \$1.5 million Kirkland Complex Roof Replacement
- Assisted in the coordinated effort of The State University Construction Fund, Facilities Planning, Facilities Services, University Services, Information Technology, the Project Shepherd and science faculty to relocate Jewett Hall and Houghton Hall occupants to the new Science Center.
- Resumed service as President of the Faculty Student Association Board of Directors for the second half of the year.
- Coordinated the collective efforts of Information Technology, Human Resources, Purchasing and University Services to compile and prepare the annual campus "Shared Services Initiatives Update" as required by System Administration.
- Provided service to the community through active membership on the United Way of Northern Chautauqua County Board of Directors.

- Continued to serve as Chairperson of the Chautauqua County State Employees Federated Appeal (SEFA).
- Provided training to the Financial Analyst on the preparation and submission of the Residence Hall Capital Plan.

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

While serving throughout the interim vice presidency, the Associate Vice President actively participated in State University Business Officers Association (SUBOA) meetings, conference calls and webinars in order to stay up-to-date on financial, construction, Executive Orders and administrative directives, and provide relevant and timely feedback to the Cabinet to guide campus actions.

The Associate Vice President provided leadership to the financial team and coordinated their collective efforts in completing all reporting requirements and responses to/implementation of System and State mandates.

The Associate Vice President provided leadership to the division, conducting regular staff and individual department head meetings to share information and guide the collective 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 her with cabinet level efforts to address the structural deficit in our operating budget.
- Assess the effects of flat state support, unfunded contractual salary increases, TAP-Gap requirements and fluctuating enrollment to provide accurate data in the development of the 2015-2016 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.
- Collaborate with Student Affairs staff in developing future residence hall rental rates, and revenue and expenditure projections based on fluctuating residence hall occupancy. Adequately budget for 2015-2016 expenditures including debt service obligations and determine the capacity to finance future capital projects and critical maintenance initiatives.
- Transition responsibility for preparation of the annual residence hall capital plan to the financial analyst and continue efforts to cross train finance staff.

Budget Office

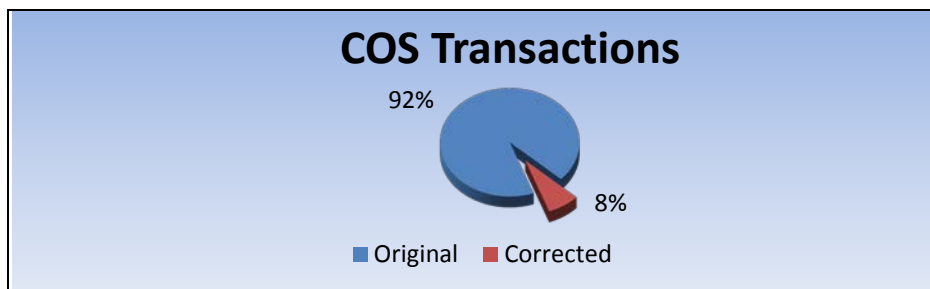
Annual Report

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 I) 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.



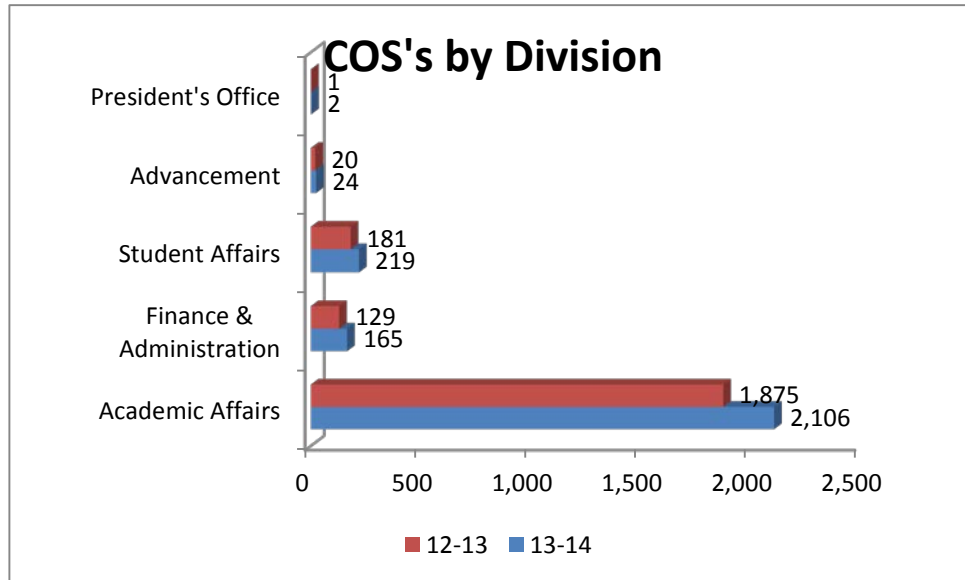
From left to right: Rachael Coon and Ann Aldrich

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.



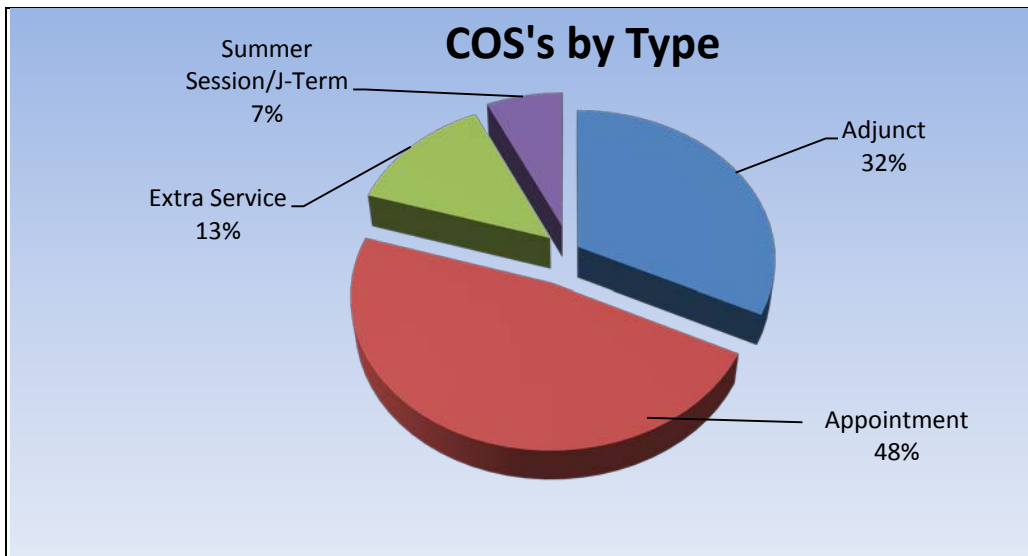
COS's Original/Corrected

Original	2,326
Corrected	190
Total	2,516



COS's by Division

Division	13-14	12-13
Academic Affairs	2,106	1,875
Finance & Administration	165	129
Student Affairs	219	181
Advancement	24	20
President's Office	2	1
Total	2,516	2,206



COS's by Type

Number of COS's by Type	
Adjunct	812
Appointment	1,197
Extra Service	335
Summer Session/J-Term	172
Total	2,516

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 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, directors and deans in Academic Affairs, Student Affairs, and University Advancement. Monthly meetings are held among 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 monthly reconciliation of the Petty Cash bank account, and bi-weekly reconciliation of administrative and graduate assistant payroll. The Budget Office also maintains adjunct budget projections on a monthly basis.

The office is staffed by a Financial Analyst (UUP) and a Budget Director (UUP).

Significant Accomplishments

- Worked in collaboration with administrative directors to develop the 2014-2015 Consolidated University Operating Budget.
- Submitted Fredonia's FORM 1 spreadsheet detailing department level allocations used to populate the SUNY's SMRT accounting system.
- Completed Fredonia's Campus Financial Management Strategies with collaborative efforts of the Associate Vice President for Finance and Administration.
- Continued tracking the history of all lines and FTEs by department.
- Processed 2,516 COS's, verifying funding and updating SUNY HR, the Payroll Distribution Management System (PDME), the comment section of the local HRMS clock tower database, and various internal spreadsheets.
- Collaborated with COS Users Group to identify and implement enhancements to the COS Employee Action Form. Provided a drop in and an update session to inform users of changes.
- The Budget Director served on the Information Technology Advisory Board (ITAB) and the Brand Investigation Committee.
- Budget Director served on the search committee which resulted in the successful hire of a new Vice President for Finance and Administration.
- Work in conjunction with Academic Affairs and Finance and Administration in the implementation of full funding of the adjunct budget to the state's operating base budget.
- Developed a five-year budget forecast.
- Developed and participated in various PowerPoint presentations informing the campus community of the budget forecast, financial reserves and an "all funds" approach to budgeting.
- Developed an interactive "Budget Road Map" to assist Cabinet in budget planning. The Roadmap was utilized to implement state budget operating reductions of \$1.2 million across divisions as well as identifying other sources of revenue to help fund the structural deficit.
- Worked with Finance and Administration personnel to successfully utilize all State budget allocation in order to maximize State funding.

Statistical Data

The Fredonia 2013-2014 Consolidated Operating Budget totaled \$106,630,545 representing an increase of \$3,217,620 (3.11%) from the 2012-2013 Consolidated Budget. Please refer to the following chart for comparative data for each of the six budget components.

Consolidated Budget Proposal

Components:	2013-2014	2012-2013	Change	Percent
University Operating Budget	\$49,669,600	\$48,143,900	\$1,525,700	3.17%
DIFR Budget	17,484,750	17,163,400	\$321,350	1.87%
FSA Budget	18,624,195	19,488,625	-\$864,430	-4.44%
IFR Budget	15,000,000	13,925,000	\$1,075,000	7.72%
SUTRA Budget	5,308,000	4,200,000	\$1,108,000	26.38%
College Foundation	544,000	492,000	\$52,000	10.57%
Total	\$106,630,545	\$103,412,925	\$3,217,620	3.11%

The 2013-2014 budget provided funding for approximately 904 FTE employees, including over 1,000 full and part-time employees, and approximately 1,000 part-time student workers. Please refer to the following chart for comparative data for each of the six budget components.

	2013-2014		2012-2013		Change	
	FTE Employees	Student Employees	FTE Employees	Student Employees	FTE Employees	Student Employees
University Operating	585.36	222.00	573.25	218.00	12.11	4.00
DIFR Budget	93.70	230.00	91.20	224.00	2.50	6.00
FSA Budget	185.00	340.00	202.00	350.00	-17.00	-10.00
IFR Budget	31.08	202.00	29.08	206.00	2.00	-4.00
SUTRA Budget	5.80	0.00	3.80	0.00	2.00	.00
College Foundation	3.50	4.00	3.50	4.00	0.00	0.00
Total	904.44	998.00	902.83	1,002.00	1.61	-4.00

The student enrollment target was 5,250 FTE, although actual enrollment recorded by Institutional Research was 5,377 FTE.

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.

Assessment Activities

The Consolidated University Operating Budget Book is published every year, generally prior to the spring meeting of the College Council. The 2014-2015 book was electronically published on schedule.

The accuracy of the information in the Budget Book is verified after the passage of the New York State Budget and the issuance of the SUNY Financial Plan. The Budget Book was completed in early May and the final Financial Plan Package was received from Albany in July.

With the passage of the SUNY 2020 bill, and presently in year four of a five-year rational tuition plan, Budget Book tuition projections were in line with financial plan numbers. The University maintained funded enrollment at 5,250 FTEs for the 2014-2015 budget cycle. Original Budget Book projections did not include one-time funding of \$174,100 of additional tax support to partially offset unfunded mandated salary increases.

The Consolidated University Operating Budget Book is a valuable resource document to the financial service units within Finance and Administration. The presentation with the narratives and pictures provides the consumer with more than “just the numbers”, by linking institutional priorities and divisional goals to the campus budget. The 2014-2015 Budget Book incorporated for the first time the College of Visual and Performing Arts and the Division of Engagement and Economic Development.

Another assessment goal contained in last year’s Annual Report was that the COS team would continue to implement enhancements to the Online COS system as needed to meet the needs of end users. In a collaborative effort, Mike Gerholdt from Information Technology, in consultation with Finance & Administration, Academic Affairs, and Institutional Research Planning and Assessment worked on a COS upgrade to accurately calculate FTE’s for part-time adjunct instructors. In the past, the part-time adjunct FTE was automatically calculated in the COS based on a salary and did not accurately reflect workload. In the fall of 2013, Human Resources, Budget, and Institutional Research met with the Provost and Deans to develop a new method for calculating part-time adjunct FTE’s. This method was based on an employee’s instructional hours and is representative of actual workload as opposed to salary. Further enhancements were needed to incorporate calculating FTE’s that applied to studio hours and placements for the School of Music and the College of Education. A drop-in session was held in June to inform users of the upcoming COS changes and an additional session was held in August to provide progress updates. Final roll out of the COS FTE upgrade is anticipated in winter 2014-2015.

Other COS Enhancements include:

1. Automatic generation of "Benefit Flag" (based on the number of paid courses).
2. Inclusion of the COS Record ID on the view and edit pages of the COS.
3. Updating of the print-doc to include benefits flag and supervisor.
4. Revamped the Manage Courses section of the Adjunct (ADJ COS) to an updated Structured Query Language (SQL).
5. Process/workflow changes for Reappointment COS's.
6. Additional action types were added and department names changes were made as warranted.

Recommendations were made once again by the COS Users Group to have the COS re-written to accommodate updates that can no longer be handled in a secure manner by the current system. Major benefits of the COS re-write would be the ability to track course releases (and associated costs) and to automatically generate contract letters. Steps were taken to develop an alternative solution to tracking course releases using existing features and making simple modifications to current dropdown lists. These efforts did not work as planned due to the numerous ways course releases are negotiated. Tracking the releases once again was tabled until the COS is rewritten.

Development of a "COS Refresher" class and changes to the COS Manual are ongoing. The class and the online manual are anticipated to be complete in fall 2014 once the final roll out is implemented for the modifications made to the ADJ COS. Two update sessions were provided during 2013-2014.

Collaboration efforts of networking with SUNY System Administration and other campuses continued throughout 2013-2014. The Budget Office has represented Fredonia in attendance at Accounting, Budget, and Bursar (ABB) meetings; sessions on Business Intelligence (BI); SUNY System Administration trainings and has participated in webinars and conference calls. Networking efforts and best practice efforts enabled the Finance and Administration Office to implement a new way of recording TAP Credit refunds without affecting the cash flow of our DIFR and FSA Operations.

Enhancements to existing budgetary procedures for the 2013-2014 fiscal year (FY) included development of a five-year budget forecast. A detailed PowerPoint presentation was developed to inform Cabinet, Planning and Budget Advisory Committee and the campus community on the five-year budget forecast, financial reserves, and the "all funds" approach to budgeting.

The Budget Office developed an interactive "Budget Road Map" to assist Cabinet in budget planning. The Roadmap was utilized to implement State budget reductions of \$1.2 million across divisions as well as identifying other sources of revenue to help fund the existing structural deficit.

The Budget Office once again enhanced its spreadsheet that tracks Cabinet approvals. This spreadsheet tracked each budget item proposed with Cabinet approval dates and details of the approval. The Budget Office also worked with various personnel on the budgetary impact of departmental re-organizations and other Cabinet funding requests.

The Budget Office continues to explore possibilities of using Business Intelligence for various reporting requirements. Various analyses were prepared throughout the year utilizing Business Intelligence data.

The Office worked in collaboration with Academic Affairs to move the on-going expenditure obligations of the adjunct faculty into the State's base operating budget. Previously, expenditure variances for the faculty adjunct budget were funded/off-set by salary savings from vacant positions, sabbaticals, leaves and unspent institutional allocation. Temporary funding mechanisms were also implemented to address increased adjunct costs due to vacancies caused by early retirement incentives, resignations and sabbatical leave of tenured faculty.

To be consistent with the institutional priorities of sustainability and being cost effective, the Budget Office continually recycles used office paper by printing on the opposite side. Also, once again this year, the Budget Office published the Budget Book electronically resulting in budgetary savings of approximately \$20,000.

The Budget Office participated in the Oracle Budget Project Study. No Feedback was provided by System Administration after this Study took place. Currently there is no impact from this SUNY initiative to the existing budget procedures on campus.

The Financial Analyst developed a new spreadsheet to incorporate monitoring and tracking the effect on cash flow and revenue generation timing for the Residence Hall Programs.

The Financial Analyst continued to perform payroll and procurement card audits that were successfully transitioned from Internal Control into the Budget Office. A total of three payroll audit and 25 procurement audits were done in 2013-2014.

The Budget Director served on the Information Technology Advisory Board (ITAB) and the Brand Investigation Committee.

Assessment Goals

- Complete the 2015-2016 Consolidated University Operating Budget on schedule.
- Continue to implement changes to the Budget Book as warranted.
- Continue to implement enhancements to the Online COS system as needed 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 advocate on behalf of the campus the need to re-write the COS to an updated language.
- Test the COS modifications that were made to calculate adjunct FTEs. Rollout these changes in winter 2014-2015.
- Upload the COS manual online and work in conjunction with members of the COS users group to develop and offer "COS Refresher" and/or training classes for any changes made by winter 2014-2015.
- 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.
- Explore possibilities of using Business Intelligence for various reporting requirements.
- Develop and maintain a five year budget forecast.
- Work with Cabinet and all divisions to implement any budgetary actions and possible cost saving measures to reduce the structural deficit.
- Work in conjunction with Academic Affairs and Administration in the implementation of raising the base pay for all adjunct faculty that currently are paid less than \$900/credit hour. Analyze the budgetary effects on this implementation.
- Continue to provide sustainable and cost savings measures to coincide with University institutional priorities.
- Continue to perform payroll and procurement card audits.
- Work with other Administrative personnel for a smooth transition for the incumbent Vice President (VP) for Finance and Administration. Adapt to possible budgetary changes envisioned by the new Vice President for Finance and Administration.
- The Budget Director will continue to serve on the ITAB Committee.
- The Budget Director will serve on the Assistant Director Institutional Research, Planning and Assessment search committee. The Financial Analyst will serve on the Fredonia College Foundation Controller search committee.

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Payroll Services

Annual Report

The primary responsibility of the Payroll Services Office is to effect 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 and summer session. To effect 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 and FTE percentage, anniversary date, appointment type and increment code for all state and graduate assistant employment. For Student Assistant and College Work Study, the Payroll Office verifies the accuracy of all appointment and new hire paper work, establishes vacant lines for appointment, monitors appropriate rate increases and over-the-max rates, and processes 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.



Seated: Tammi Dahl; back row from left to right: Ruth Phillips, Sue Cortes and Julie O'Connor

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

- Assists with the completion of employment forms, such as employment eligibility, tax withholding, non-resident alien tax documentation, payroll deduction and direct deposit.
- Completes employment verification requests for unemployment insurance and loan requests.
- Processes applications for retirement plan enrollment.
- Offers assistance regarding payroll procedures and schedules.
- Prepares College Work Study reconciliation for completion of 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, a Payroll Examiner 1, and a Clerk 1. Student temporary service employees also provide assistance.

Significant Accomplishments

- Provided Student Payroll training to supervisors, secretaries, and resident directors.
- Contributed and participated in New Hire Orientations for new faculty, and residence hall directors.
- Processed 2,500 COS forms for campus payroll transactions for State and graduate assistant employees.
- Produced over 36,700 biweekly pay checks and direct deposits for State and student employees.
- Continued the implementation of the online Time and Attendance System (TAS) developed by SUNY System Administration. To date, non-teaching UUP professional and M/C employees in all divisions have been moved to and are using the new system. Implementation involves loading each employee's attendance balances and data prior to use of the system. Loading and roll-out to the teaching faculty is on schedule and in-process for the summer of 2014 for fall 2014 roll-out.
- Processed the New York State minimum wage increase to all Student Assistant and College Work Study employees from \$7.25 per hour to \$8.00 per hour.
- Payroll continues to be an integral part in meetings and discussions with Budget, Finance and Administration, Human Resources, and Information Technology regarding the COS application. Major enhancements to accurately capture instructional load and FTE were made, as well as meetings to update the COS Users manual in anticipation of a campus wide training session. The Payroll Director continues to maintain the COS by managing user, department, hierarchy, and coding changes for this campus-wide application.
- The Payroll Services website continues to be maintained and improved with current data and forms. Many of our online forms were changed to fill-able PDF forms. All schedules, procedures, and forms are current.
- Coordinated efforts again this year with Financial Aid and Lakeshore Savings Bank to provide one-stop access for student assistants and College Work Study student workers to complete paperwork, pick up work study referrals, and open banking accounts for direct deposit purposes.
- Attendance by Payroll staff at a training conference in Albany conducted by the Office of the State Comptroller.
- Regular participation of the Payroll Director in quarterly Payroll Users Group web conferences with other SUNY and State agencies in an effort to remain abreast of current and future federal, State, and SUNY policies.

Statistical Data

As a measure of accuracy in processing payrolls, previous annual reporting provided rankings of all SUNY campuses as well as statewide rankings with other State agencies with regards to late separations and late hires. This data was compiled by the Office of the State Comptroller (OSC), but due to ongoing staffing and budgetary constraints, OSC has discontinued the production of the mid-year report card. Through the use of other available reporting tools, the Payroll Office is able to individually report that our number of late terminations decreased from 2013 from 12 to 4. This has 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 decreased from 2013 from 59 to 46. This decrease positively affects the amount of retroactive pay that is required to be submitted through the State Comptroller's Office.

Corrective measures will 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. The COS workflow revisions and campus-wide COS training currently being discussed with Payroll, Budget, Human Resources, and Academic Affairs will provide an opportunity for improved performance in these areas. 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.

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.

Assessment Activities

The Payroll Services unit designed and delivered payroll presentations for New Faculty Orientation, and review of the evaluation forms found that the attendees reported positive feedback.

Payroll Services also provided training workshops for student payroll supervisors to reinforce standard policies and procedures, as well as introduce updated forms and the student payroll website. This unit developed and distributed formal evaluation forms, and upon review found positive feedback regarding the usefulness and effectiveness of this training.

Assessment Goals

- Accurately process payrolls for faculty, staff and students.
- Continue to provide training workshops and formalize feedback as to the effectiveness of the material presented.
- Continue to assist with the new hire orientations and review evaluation forms to improve the effectiveness of the orientations.
- Continue participation with the online COS team to implement enhancements to the system as needed to meet the needs of the end users; formalize feedback as to the effectiveness of the changes.
- 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.
- Complete conversion of UUP employees to the TAS online system.
- Continue to implement enhancements to the online COS system as needed to meet the needs of the end users and comply with System Administration modifications. Work in collaboration with IT staff to implement recommendations.

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University Controller

Annual Report

The University Controller is responsible for providing leadership, coordination and supervision for the Purchasing, Student Accounting, and University Accounting Offices.

The University Controller prepares and submits the annual campus revenue projections to System Administration. Revenue projections are comprised of tuition, fees and interest, based upon approved enrollment figures provided by the Office of Institutional Research. Initial revenue projections are typically prepared in mid-fall and serve as a starting point for preparation of the upcoming fiscal year campus operating budget. Finalized projections are 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. Reconciliation of projected versus actual revenue is prepared on a monthly basis with variances plus or minus 5% from target requiring written explanation to System Administration Controller's Office.



Judy Langworthy

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.

Campus disbursement projections, forecasted by month, on an annual basis are submitted to System Administration upon request. The System Administration Controller's Office is required to manage the entire SUNY System's spending patterns consistent with the State fiscal year and the State's Financial Plan.

Additional responsibilities include coordination among faculty, department chairs, deans and vice presidents 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 and residence hall-funded scholarships; oversight and direction of year-end fiscal closing procedures; service to the campus through committee work and participation in campus sponsored events.

In the absence of the Vice President for Finance and Administration and the Associate Vice President for Finance and Administration, the University Controller assumed the coordination of the financial reviews with the Academic Affairs division and the Student Affairs division.

Significant Accomplishments

- Worked with the Associate Vice President for Finance and Administration and 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 Visual Arts and New Media, Communication, and Theatre and Dance, as well as securing course fee increases in Visual Arts and New Media.
- Prepared detailed analysis of available funding and projections for new and current campus-based scholarship offerings.
- Modified and administered the student fee survey to currently enrolled students. The results were summarized and reported to System Administration as a component of our Comprehensive Student Fee request.
- Attended Accounting/Budget/Bursar and SUBOA meetings and participated in conference calls.
- Continue to serve on the SUNY Fredonia Federal Credit Union Board as secretary; serve as co-captain of the SUNY Fredonia Administration Team for the Relay for Life; serve on the Recruitment Committee for the Chautauqua Leadership Network; serve on the board of the Southwestern Chapter of the American Red Cross, and member of the Chautauqua County SEFA Committee.

Assessment Update

Assessment Statement

The University Controller serves as a leader and professional mentor to the Offices of Purchasing, Student Accounts, and University Accounting. Working with each of these offices provides credible and timely procurement procedures and expenditure analysis to the campus, and billing information to the students. The University Controller serves as a resource to peers, deans, directors and department chairs on financial matters.

Assessment Activities

The University Controller coordinated the fiscal year-end closing proceedings, ensuring that all funds were utilized in the most effective manner and that no state appropriations were lapsed. The Controller maintained 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 fiscal year end.

The 2013-2014 academic year was the fifth full year for the e-Billing and e-Payment processes in the Office of Student Accounts. We continue to evaluate the effect of this methodology on accounts receivable. At June 30th, the fall receivables were slightly higher, \$97,696 for fall 2013 as compared to \$94,558 for fall 2012. However, the spring receivables at June 30th were significantly lower with a 26% decrease from \$170,787 for spring 2013 to \$126,831 for spring 2014.

Increased emphasis to the electronic process and payment plan options have been provided during the new student summer orientation program. Account receivable balances will continue to be monitored on a monthly basis.

Participation in the campus-based “Fredonia Installment Payment Plan” (FIPP) decreased in 2013-2014 to a total of 911 enrollees from 934 enrollees in 2012-2013, a 2.5% decrease. Payment plans were stated on the e-Billing and were also given additional emphasis at summer orientation sessions; participation rates will continue to be an area that is closely monitored.

The electronic advance deposit payments for admission increased 6%, whereas the electronic room rental deposits decreased just slightly.

The mandatory use of Procurement Cards (P-Cards) for purchases under \$1,000 remains in effect. The number of P-Card transactions and the dollar volume decreased in 2013-2014. Transactions were 663 fewer and the dollar volume dropped to \$2.83 million from \$2.96 million in 2012-2013. Similarly, with purchase orders and confirming requisitions in 2013-2014, the number of transactions decreased as did the dollar volume. Efforts to further diminish the number of purchase orders and confirming requisitions will continue, as they cost considerably more to process than monthly P-Card payments.

The University Controller provided detailed analysis of current and proposed campus funded scholarships for the Vice President of Student Affairs, ensuring adequate funding for all new and renewed awardees.

All direct reports participated in their SUNY peer groups affording our campus with full representation at Purchasing, Student Services, and Accounting committee meetings. In addition, various staff attended the following: NAEP fall conference, TouchNet's Straight Talk and the year-end State University Business Officers Association (SUBOA) meeting.

Assessment Goals

- Ensure that year-end accounting and purchasing procedures are completed and closed without any lapsing of State funds.
- Continue to evaluate the effects of the TouchNet eBill and Payment Plan modules on account receivable balances, payment plan participation and advance deposit payments.
- Continue to evaluate the implementation of the mandatory threshold for P-Card purchases under \$1,000.
- Monitor cash flow, revenue, over-enrollment and reserves to ensure that all identified measures to fund the current budget shortfall are properly funded; provide accurate projections to be utilized in the preparation of the 2015-2016 operating budget.

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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 and processing confirming requisitions; reviewing and processing standard requisitions into purchase orders, change notices, and when necessary, cancelations; furniture purchases; processing of office supply orders with various office supply vendors, ensuring the best pricing available. We obtain vendor information for the State Financial System. In the review of requisitions, we provide expertise relevant to cost effective methods, commodity information and sourcing, negotiations, quoting and re-quoting, and problem solving. We also handle returns of incorrect or damaged goods. All aspects of the State issued procurement card are managed by the purchasing staff including training, cardholder set up, auditing, reconciling, and troubleshooting. Research Foundation transactions are also input and corresponding purchase orders are produced.



Seated: Joan Schnur; in back from left to right: Shari Miller and Donna Howlett

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), Industries for the Blind of New York, Inc. (NYSIB), and Minority Women Business Enterprise (MWBE). Responsibilities also include ensuring trademark and licensing procedures are followed, and dissemination of information from the Office of General Services (OGS) website for “P” contracts to the appropriate departments, as well as assisting in the formal bidding process with bid openings.

The Purchasing Office is staffed with a Director, a Purchasing Assistant 2, one part-time Clerk 1, and one student assistant.

Significant Accomplishments

- Expedited purchase orders to ensure there were no lapsed funds at fiscal year end.
- 149 procurement card holders with 7,968 transactions, totaled \$2,825,060.43.
- Presented at the Finance and Administration Training Workshops in August of 2014.
- Added/updated approximately 260 vendors in the Statewide Financial System (SFS).
- Purchasing Department employees attended various conferences and workshops during fiscal year 2013-2014 including the fall 2013 Secretarial/Clerical Conference; the Secretarial/Clerical Mini-Conference; the fall 2013 National Association of Educational Procurement (NAEP) Conference; the spring 2014 SUNY Purchasing Association Conference; weekly WNY Strategic Sourcing Meeting; and monthly WNY Shared Services meetings.

- Purchasing Department staff have a presence in the SUNY Fredonia Federal Credit Union Credit Committee, EAP Committee, the Chemical/Biological Safety Committee, Trademarks & Licensing Committee, SUNY/RF Procurement Team, Fredonia Sustainability Committee, Council for Women’s Concerns Committee, Building Safety Committee, two campus investment clubs, along with various community groups such as National Night Out Committee, Girl Scouts, and more.

Statistical Data

- The SUNY MWBE goals for 2013-2014 are a combined 20%. However, the goals for MWBE commodities are 12% minority and 7% women business enterprises. Fredonia has been documented at well over the 20% SUNY goal with SUNY System statistical data reporting 32.76% total for purchase orders, no order vouchers, and contracts. We continue to work with System Administration, seeking a solution to ensure we capture all MWBE activity in our business transactions so our successes are fully reported. Please refer to the following chart for comparative statistics.

MWBE Activity for Purchase Orders					
	2009-10 %	2010-11 %	2011-12 %	2012-13 %	2013-14 %
MBE	12.19	18.37	7.69	7.94	4.73
WBE	5.98	20.85	15.02	22.21	28.03
Total	18.17	39.22	22.71	30.15	32.76

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 campus 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 online requisitioning, 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 held in August. 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. Evaluation forms are also used at procurement card training sessions.

Assessment Goals

- Continue to present purchasing workshops to include procurement cards, Trademarks and Licensing procedures, and other relevant purchasing issues, policies, and practices.
- Continue to work with SUNY System Administration on the Fredonia Citibank VISA Procurement Card program and web procurement.
- Continue to decrease small dollar purchases through procurement card education and mandatory use.
- Update the Purchasing Department webpage and manual as necessary.
- Ensure that requisitions are processed in a timely and accurate manner.
- Ensure that Research Foundation purchase orders are processed in a timely and accurate manner.
- Continue to strengthen campus awareness of NYS certified MWBE vendors in an effort to increase their usage.
- Strive to meet SUNY's MWBE goals of 12% MBE and 7% WBE for commodities.
- Utilize evaluation forms at all training workshops and incorporate viable suggestions into future sessions.

2013 - 2014
Purchasing Volume Report
July 2013 - June 2014

STATE	2013 - 2014 P.O.		2013 - 2014		2013 - 2014 CONFIRMING		Office Supply ON LINE		TOTAL/Office Supplies		New	CITIBANK VISA				
	VOLUME		PREPAYMENTS		REQUISITIONS		PURCHASES		P.O. s & REQUISITIONS		P-Card	2013-2014				
DATE	P.O.	AMOUNT	NO.	AMOUNT	NO.	AMOUNT	NO.	AMOUNT	NO.	AMOUNT	Holders	# of Trans	Amount			
JUL. 13	67	\$ 474,789.07	32	\$ 24,628.00	42	\$ 64,716.30	45	\$ 4,857.41	186	\$ 568,990.78	0	585	\$ 263,356.46			
AUG. 13	30	\$ 177,816.82	30	\$ 19,172.00	62	\$ 194,759.40	80	\$ 8,818.82	202	\$ 400,567.04	0	787	\$ 273,490.02			
SEPT. 13	57	\$ 345,170.74	6	\$ 1,390.00	49	\$ 126,840.44	74	\$ 8,481.02	186	\$ 481,882.20	1	910	\$ 276,205.23			
OCT. 13	53	\$ 368,115.26	2	\$ 259.00	46	\$ 135,145.27	73	\$ 5,579.69	174	\$ 509,099.22	0	814	\$ 254,120.78			
NOV. 13	27	\$ 291,591.76	3	\$ 1,400.00	33	\$ 81,600.97	61	\$ 8,106.24	124	\$ 382,698.97	3	638	\$ 224,653.02			
DEC. 13	29	\$ 349,258.90	3	\$ 1,500.00	28	\$ 41,193.07	46	\$ 5,017.42	106	\$ 396,969.39	1	420	\$ 113,395.72			
JAN. 14	50	\$ 429,728.43	5	\$ 28,112.00	38	\$ 147,846.10	57	\$ 5,043.73	150	\$ 610,730.26	7	619	\$ 216,382.35			
FEB. 14	55	\$ 280,077.35	16	\$ 1,325.00	49	\$ 126,103.06	58	\$ 7,670.15	178	\$ 415,175.56	0	744	\$ 246,590.77			
MAR. 14	50	\$ 712,507.60	8	\$ 1,700.00	37	\$ 94,714.34	53	\$ 8,289.00	148	\$ 817,210.94	0	647	\$ 204,807.60			
APR. 14	51	\$ 375,334.34	2	\$ 5,636.00	41	\$ 41,202.73	58	\$ 8,957.08	152	\$ 431,130.15	0	686	\$ 225,747.16			
MAY. 14	63	\$ 927,110.23	8	\$ 15,254.00	45	\$ 122,790.08	27	\$ 4,339.23	143	\$ 1,069,493.54	2	523	\$ 226,751.62			
JUN. 14	118	\$ 1,487,167.99	8	\$ 13,262.00	51	\$ 160,599.07	48	\$ 8,834.79	225	\$ 1,669,863.85	0	595	\$ 299,559.70			
YTD 13 - 14	650	\$ 6,218,668.49	123	\$ 113,638.00	521	\$ 1,337,510.83	680	\$ 83,994.58	1,974	\$ 7,753,811.90	14	7968	\$ 2,825,060.43			
YTD 12 - 13	707	\$ 6,269,243.25	144	\$ 493,452.86	539	\$ 1,545,073.24	677	\$ 112,686.99	2,067	\$ 8,420,456.34	9	8631	\$ 2,963,834.20			
JUN. 14	118	\$ 1,487,167.99	8	\$ 13,262.00	51	\$ 160,599.07	48	\$ 8,834.79	225	\$ 1,669,863.85	0	595	\$ 299,559.70			
JUN. 13	90	\$ 417,753.02	10	\$ 46,301.00	53	\$ 171,368.95	62	\$ 13,970.43	215	\$ 649,393.40	0	639	\$ 222,178.75			
RESEARCH	2013 - 2014		2013 - 2014		TOTAL		MBE% WBE%		MWBE%		Vouchers Processed for 2013-2014					
			Other Voucher Processing		Research				Campus		Quick Pay Vouchers		Petty Cash		TOTAL	
	DATE	P.O.	AMOUNT	NO.	AMOUNT	NO.	AMOUNT			NO.		AMOUNT	NO.	AMOUNT	NO	AMT
JUL. 13	2	\$ 13,746.00	214	\$ 97,318.34	216	\$ 111,064.34					363	\$ 2,439,596.00	0	\$ -	363	\$ 2,439,596.00
AUG. 13	7	\$ 3,253.59	82	\$ 114,982.35	89	\$ 118,235.94					330	\$ 1,703,787.80	0	\$ -	330	\$ 1,703,787.80
SEPT. 13	3	\$ 23,333.08	70	\$ 66,946.00	73	\$ 90,279.08	9.26	18.16	27.43		321	\$ 1,294,094.98	0	\$ -	321	\$ 1,294,094.98
OCT. 13	2	\$ 803.85	88	\$ 97,521.08	90	\$ 98,324.93					450	\$ 2,171,632.13	0	\$ -	450	\$ 2,171,632.13
NOV. 13	1	\$ 150.00	168	\$ 50,548.50	169	\$ 50,698.50					351	\$ 1,264,113.05	3	\$ 5,256.00	354	\$ 1,269,369.05
DEC. 13	7	\$ 65,213.58	52	\$ 19,485.35	59	\$ 84,698.93	2.04	37.49	39.53		308	\$ 1,355,607.45	3	\$ 10,200.00	311	\$ 1,365,807.45
JAN. 14	4	\$ 12,655.79	165	\$ 77,463.13	169	\$ 90,118.92					453	\$ 1,603,477.71	0	\$ -	453	\$ 1,603,477.71
FEB. 14	7	\$ 43,214.76	73	\$ 86,226.60	80	\$ 129,441.36					386	\$ 1,175,094.94	1	\$ 4,140.00	387	\$ 1,179,234.94
MAR. 14	3	\$ 68,780.33	78	\$ 54,584.78	81	\$ 123,365.11	4.86	16.25	21.12		383	\$ 1,720,342.30	7	\$ 17,347.00	390	\$ 1,737,689.30
APR. 14	1	\$ 10,925.52	96	\$ 59,905.08	97	\$ 70,830.60					422	\$ 1,123,611.31	1	\$ 900.00	423	\$ 1,124,511.31
MAY. 14	3	\$ 2,791.81	83	\$ 52,820.90	86	\$ 55,612.71					541	\$ 1,058,940.17	2	\$ 1,032.00	543	\$ 1,059,972.17
JUN. 14	2	\$ 28,754.40	128	\$ 42,521.20	130	\$ 71,275.60	4.67	32.16	36.82		430	\$ 2,153,290.05	0	\$ -	430	\$ 2,153,290.05
YTD 13 - 14	42	\$ 273,622.71	1297	\$ 820,323.31	1339	\$ 1,093,946.02	4.73	28.03	32.76		4738	\$ 19,063,587.89	17	\$ 38,875.00	4325	\$ 16,949,172.84
YTD 12 - 13	46	\$ 105,911.24	1231	\$ 717,852.73	1277	\$ 823,763.97	8.63	20.42	29.05		4385	\$ 22,553,655.61	20	\$ 34,429.00	4405	\$ 22,588,084.61
JUN. 14	2	\$ 28,754.40	128	\$ 42,521.20	130	\$ 71,275.60					430	\$ 2,153,290.05	0	\$ -	430	\$ 2,153,290.05
JUN. 13	6	\$ 38,637.00	176	\$ 56,097.39	182	\$ 94,734.39					490	\$ 2,364,664.50	0	\$ -	490	\$ 2,364,664.50

2013 - 2014 STATE	\$ 7,753,811.90	1,974	13 - 14 TOTAL OF ALL STATE PURCHASES	\$ 10,578,872.33	9,942
2013 - 2014 RESEARCH	\$ 1,093,946.02	1339			
2013 - 2014 VISA	\$ 2,825,060.43	7,968	13 - 14 STATE, RESEARCH, VISA	\$ 11,672,818.35	11281
New "P" Card Holders	14		12 - 13 STATE, RESEARCH, VISA	\$ 12,208,054.51	11975

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



From left to right, front row: Becky Siragusa, Mary Jo Rusch, Pat Ippolito, and Angie Astry; in back: Rhonda Gominiak, Dana Berry, Debbie Desmond, Lisa Marrano, and Lynn Bowers

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 each of the Summer, Spring Into Fredonia, International Student, and Graduate Assistant Orientation programs.

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. Work Study and Student Assistant paycheck distribution, and billing and collecting for employee long distance personal telephone calls also reside in this department.

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. Biannually reporting requirements to System Administration include the submission of a Trial Balance, Reconciliation of Fund Balance, Aged Student Accounts Receivable, Reconciliation of Collections, Collection Fund Reconciliation, and Student Revenue Data Submission (SRDS). 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 is staffed with a Director, an Associate Director, a Revenue Accountant, an Administrative Aide, two full-time and two part-time Clerical employees, and a Secretary.

Significant Accomplishments

- Successfully transmitted the Tax Relief Act file to SUNY in a timely fashion.
- 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.
- Continue to certify TAP in a timely manner and properly certify students utilizing the two different SAP charts, dependent upon when they initially received TAP.
- The residency lawsuit continues and we completed the claims phase with the successful and timely review and approval/denial to any claims received. All of our identified class members did respond during the claims phase and will receive refunds. SUNY Legal required us to review our data again to ensure and confirm that we included both undergraduate and graduate students in the initial population that we submitted to them.
- Continue to manage operations in the cashier's area with one less cashier as a result of a retirement.
- The Director attended TouchNet's Straight Talk seminar in Pittsburgh, PA.
- Successfully implemented and billed electronically for the 2013-2014 tuition increase.
- PEER Transfer was implemented in Spring 2013, and the students that have utilized the service have been pleased with the ease of making their payment. Throughout the past year, we received 28 payments through Peer Transfer totaling \$302,792.
- The Enrollment Confirmation Survey continues to provide us with useful data necessary to determine the students that will and won't be in attendance. Those students that respond that they will not be in attendance are verified and their courses are dropped. This new procedure ensures our accounts receivable data is more accurate in addition to opening those classes up to the students.
- Successfully implemented and trained the Student Accounts Office staff on the TouchNet 6.5 upgrade changes so they knew what students and authorized users were seeing on the web.
- Successfully hired and trained a new Secretary I for the Student Accounts Office due to a vacancy from a promotion.
- Tested and implemented an upgrade in check printing software to the latest version.
- All URAS reporting deadlines were met and requirements were satisfied per System Office review.
- Tested and implemented all relevant patches for the Banner Finance module.
- 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 the continued implementation of Direct Loan Program to ensure that loan funds are accurately accounted for in the URAS system.
- Produced the twelfth annual Fredonia Revenue Accounting/Student Accounts Report, a reference document of the financial data generated from these areas that includes appendices with historical statistical data.
- Continued work on the Banner Procedure Manual for functions of Student Accounts and Revenue Accounting.
- Submitted all Student Revenue Data Submissions (SRDS) in a timely manner for the Net Price Calculator.

- 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 18,360 bills for the fall 2013 and spring 2014 semesters, a decrease of 4.83% from last year. All bills were sent electronically. 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.

Fredonia Student Account Bills

	2011-12		2012-13		2013-14	
	# Bills	Billed Amount	# Bills	Billed Amount	# Bills	Billed Amount
Fall						
Registration	5,471	\$32,223,868.86	5,080	\$30,292,169.85	4,934	\$31,922,842.51
Post Registration	2,615	17,231,788.74	2,508	15,897,442.12	2,297	15,986,905.10
Audit #1	1,279	8,614,324.56	1,622	11,203,437.54	1,412	10,496,530.51
Audit #2	1,030	7,297,299.40	1,298	9,699,754.76	1,070	8,361,626.17
Audit #3	441	3,118,882.66	478	3,648,494.74	423	3,334,748.48
Spring						
Registration	4,938	31,345,775.57	4,639	30,571,271.86	4,591	32,063,837.14
Post Registration	1,623	11,093,587.23	1,656	11,540,947.02	1,601	11,969,062.61
Audit #1	808	5,708,844.54	887	6,486,465.64	950	7,328,999.02
Audit #2	690	5,056,157.70	794	6,020,275.43	732	5,759,766.95
Audit #3	358	2,738,804.38	332	2,544,613.31	351	2,918,977.24
Total	19,253		19,294		18,361	

There were 3,337 students subscribing to the Faculty Student Association (FSA) Debit Account for the fall and spring semesters with a billable total of \$1,895,200, representing a 6.3% decrease in the number of subscribers and a decrease of 7% in dollar value.

The Student Accounts Office billed \$646,554 for laboratory and class fees for the 2013-2014 academic year, representing an increase of 15.8% from the prior year.

Direct deposit of refunds directly into bank accounts totaled 1,295 for \$1,796,615, a decrease of 2.2% in number and a decrease of 1.6% in dollar value.

A total of 9,227 credit card web payments were processed for a total of \$14,791,368 during 2013-2014. Since initial implementation in October 2003, \$80,250,425 of credit card payments have been processed via the web payment system. In addition, 2,671 WebCheck transactions were processed in the 2013-2014 year for a total of \$6,257,546. Please refer to the following charts for comparative data.

Web Credit Card Payments					
Month	2009 - 2010	2010 - 2011	2011-12	2012-13	2013-14
July	\$423,120.26	\$622,873.86	\$336,855.62	\$799,119.49	\$1,010,849.30
August	2,417,956.91	4,051,417.65	3,655,853.82	4,148,595.98	4,412,470.97
September	463,060.48	767,369.42	1,531,174.37	882,803.25	779,592.38
October	532,784.75	853,339.43	772,227.22	764,179.88	794,298.65
November	160,312.19	214,081.47	233,075.37	261,076.28	267,022.87
December	614,019.70	812,166.81	950,943.88	1,018,097.43	1,202,895.94
January	3,378,117.40	3,517,180.78	3,738,368.63	3,708,100.41	4,200,922.80
February	541,362.20	657,279.43	959,332.71	917,530.24	869,731.28
March	609,806.47	739,941.20	782,486.16	626,753.61	597,701.76
April	385,030.32	301,771.07	416,299.49	391,734.86	399,271.50
May	161,182.63	194,024.22	208,331.45	284,271.19	202,763.88
June	45,930.35	60,149.43	41,934.93	44,139.01	53,846.43
Total	\$9,732,683.66	\$12,791,594.77	\$13,626,883.65	\$13,846,401.63	\$14,791,367.76
Net Increase		31.43%	6.53%	1.61%	6.82%

Webcheck Payments					
Month	2009 - 2010	2010 - 2011	2011-12	2012-13	2013-14
July	\$159,158.74	\$336,634.40	\$134,304.12	\$391,329.31	\$342,715.49
August	890,333.03	1,506,857.79	1,773,146.40	1,680,246.27	1,841,420.91
September	200,797.70	338,163.56	590,959.34	523,124.48	417,070.14
October	252,062.12	391,113.41	368,283.07	413,191.79	396,355.74
November	78,157.04	135,518.16	112,270.68	193,285.32	172,432.97
December	229,251.45	384,890.13	373,489.77	520,914.26	415,952.51
January	1,281,577.35	1,361,612.07	1,523,281.79	1,559,625.55	1,592,274.08
February	206,937.99	280,539.60	458,403.45	391,188.39	442,713.44
March	275,227.45	382,906.85	318,081.73	301,261.13	341,589.83
April	130,336.25	142,909.79	160,309.68	218,794.76	180,395.06
May	57,272.24	66,891.64	70,150.83	77,332.87	87,710.60
June	9,647.40	26,415.00	21,299.58	14,740.74	26,915.15
Total	\$3,770,758.76	\$5,354,452.40	\$5,903,980.44	\$6,285,034.87	\$6,257,545.92
Net Increase/ Decrease		42.00%	10.26%	6.45%	-0.44%

During the 2013-2014 fiscal year, \$105.8 million of collected revenue and \$29.7 million of cash disbursements were accounted for within the University Revenue Accounting System. These figures represent a 2.50% increase in collections and a 0.93% increase in cash disbursements from last year. Please refer to the following chart for comparative data.

CASH COLLECTIONS				
	2012-2013	2013-2014	Change	Percent
Tuition	\$32,971,983	\$33,988,644	\$1,016,661	3.08%
College Fee & Student Fees	8,749,376	8,746,762	-2,614	-0.03%
Campus Debit Card	2,003,329	1,869,449	(133,880)	-6.68%
Residence Hall Rental	16,311,342	17,250,844	939,502	5.76%
Food Service	11,554,221	12,341,429	787,207	6.81%
IFR Receipts	2,145,096	1,847,033	(298,063)	-13.90%
Disbursements	29,473,272	29,748,270	274,998	0.93%
Total	\$103,208,620	\$105,792,431	\$2,583,811	2.50%

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.

Throughout the 2013-2014 year, Student Accounts worked closely with the Financial Aid Office to assist students with their current balance due in an attempt to reduce accounts receivable.

Our survey numbers decreased by two this year to five completed surveys. We hope to have the survey online when students are logging into “Your Connection” during peak times within the next year.

Throughout the past year, we have worked closely with SUNY Legal Counsel to provide all that was needed for the Residency Lawsuit. We promptly responded to all claims that were submitted by students during the claims period. Additionally, upon SUNY Legal’s request, we reviewed all of our data that was submitted to SUNY Legal initially to ensure that we had included both undergraduate and graduate students in our population, which we had. The Director of Student Accounts attended TouchNet’s Straight Talk in Pittsburgh, PA. At the seminar, she gained valuable information about changes in the PCI standards and how best for the campus to remain compliant. She learned about new features and enhancements coming in the next TouchNet release, in addition to new products available.

During the past year, we have worked with University Services to complete the Collection Agency RFP, and we await University Services to complete the contract.

The Student Accounts Office has worked closely with the Registrar’s Office, Financial Aid, Student Affairs, FSA, Institutional Research, Residence Life, IT, and Admissions on the implementation of an Enrollment Confirmation survey which was implemented in Spring 2013. We continue to utilize the Enrollment Confirmation survey, and the Registrar’s Office is removing the student’s courses and subsequent charges based on the response that the student was not in attendance. This data has proven to be invaluable and we appreciate receiving a majority of the Section 18 notifications that are served when students complete the survey.

In December 2013, we signed a one year extension to our existing contract with TouchNet to provide our eServices. In the recent months, we initiated an RFP for an eBill, ePayment and Marketplace solution. All of the reviews have been submitted to University Services and we are waiting for the contract to be created and approved.

Throughout the past year, we worked with Financial Aid, IT, Lifelong Learning and the Registrar’s Office to implement a new process for the dropping of classes for J-Term and Summer Session. We determined that a shopping cart is a very difficult option to create with all of the variables surrounding aid and Summer Session registration. The next best solution was to create a report for Lifelong Learning to run that would provide email addresses to those that still had a balance due for J-Term and Summer Session. Lifelong Learning runs this report multiple times during the registration period notifying students of their balance due and the pending due date. The result has been a reduction in the number of students that are dropped for non-payment during the J-Term and Summer Sessions.

Unfortunately the Parking Database improvements were put on hold by IT over the past year, so individuals aren’t able to register and pay online at this point. We hope this will be completed next year.

Throughout the past year there was continual progress with IT on the SUNY Business Intelligence Initiative until an IT review was completed recently. Upon the retirement of some key individuals and reorganization of IT, progress has been temporarily postponed.

All 2013-2014 URAS biannual reports, as well as the annual report, were submitted to System Administration prior to the due date. 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 new dorm regulations.

All Banner patches and new releases are continually tested to ensure that they work properly when applied in our production database. Student Revenue Data Submissions (SRDS) is consistently monitored with new patches, as well as reporting the submission to System Administration twice per year.

Students are being notified more frequently through both email and mail if they have an old un-cashed 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.

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 increased 4%; charges for all other banking services increased 5% (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.

Credit Card Merchant Charges				
Comparison Year-to-Date as of June 30, 2014				
Fiscal Year 2012-2013 Compared to 2013-2014				
	13/14	12/13	Inc/Dec	% Inc/Dec
CASHIERS	\$50,343.37	\$62,895.43	(12,552.06)	-20%
INTERNET	339,461.17	314,478.37	24,982.80	8%
INTERNET INCUBATOR	352.95	996.44	(643.49)	-65%
INTERNET MARKETPLACE	10,936.75	6,907.16	4,029.59	58%
INT MARKETPLACE ADVAN.	2,527.05	2,203.39	323.66	15%
FREDONIA BOX OFFICE	7,105.13	7,047.26	57.87	1%
TOTAL	<u>\$410,726.42</u>	<u>\$394,528.05</u>	\$16,198.37	4%

Bank Invoice Charges Comparison Years 2012-2013 and 2013-2014				
	13/14	12/13	Inc/Dec	Percentage Inc/Dec
July	1,407.91	1,161.59	246.32	21%
August	2,732.64	1,801.17	931.47	52%
September	2,723.27	2,661.61	61.66	2%
October	2,931.17	2,930.31	0.86	0%
November	1,664.79	1,591.34	73.45	5%
December	1,376.23	1,483.67	(107.44)	-7%
January	1,852.42	2,016.21	(163.79)	-8%
February	2,775.07	2,968.88	(193.81)	-7%
March	2,232.48	2,001.26	231.22	12%
April	1,681.45	1,592.08	89.37	6%
May	1,320.98	1,321.94	(0.96)	0%
June	1,335.94	1,278.54	57.40	4%
TOTAL	<u>\$24,034.35</u>	<u>\$22,808.60</u>	\$1,225.75	5%

Assessment Goals

- 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.
- Increase the number of customer satisfaction surveys received by the office.
- Work with SUNY Legal Counsel as they refund the eligible students and bill us for the tuition difference, interest, and attorney fees as a result of the class action lawsuit.
- Attend TouchNet's COMTEC in November 2014.
- Work with the Director of University Services to complete the RFP for the Collection Agency as our current region's contract has expired.
- Continue to work with Internal Control and University Services on the RFP for an eBill, ePayment, and Marketplace solution.
- Work with IT on the next phase of the Parking Database improvements to include the ability to register and pay online.
- Work with Financial Aid to include the Veteran's benefits on RPAAWRD.
- Complete a search to fill two upcoming vacancies in the Student Accounts Office due to retirement.
- Create videos to post online showing students how to enroll in a payment plan, pay a deposit and view their eBill.

- Create an online store for students, faculty and staff to pay their parking fines through Marketplace.
- Update to the new logo and campus name on TouchNet, Piracle checks, PEER Transfer, letterhead, envelopes, etc; add logo to the parking stickers.
- Continue monitoring the accuracy and timeliness of the URAS reports.
- 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 submitting the Student Revenue Data Submission two times per year.
- Continue reconciling our records with the Attorney General's record for accuracy as needed.
- Continue notifying students more frequently for old un-cashed checks.
- Reconcile the Grad Assistantship records for accuracy.
- Send dormitory funds to NYS Tax and Finance biweekly.

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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.



From left to right: Kathy Dyckes, Sandy Noble and Cindy Haase

The University Accounting Office also processes all Research Foundation award payments. The expenses, governed by award stipulations, include purchases of office supplies, furniture, utilities, travel expenses on the Travel and Non-Employee Travel Cards and reimbursements, independent contractor payments, rent and lease payments, event (cultural outings) payments, NYS inter-agency transfers for both payments and revenue received, and student stipends. The University Accounting Office 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 Verizon long distance telephone calls, Verizon cell phone calls, personal and business photocopying, campus Copy Center service, postage, storehouse inventory and State fleet automobile usage.

On a biweekly basis, the number of State and graduate assistant paychecks are verified and distributed to campus personnel.

On a monthly basis, departmental accounting reports are prepared summarizing allocation, revenue, cash balance, and encumbrance and expenditure information for State, Income Fund Reimbursable (IFR), and Dormitory Income Fund Reimbursable (DIFR) accounts. Reviewed in detail by the financial services directors, summary findings and recommendations are documented and then distributed with the reports to the vice presidents, associate vice presidents and deans in Academic Affairs, Student Affairs, University Advancement, and Engagement and Economic Development. A monthly Construction Fund account report is also prepared and reviewed summarizing allocation, encumbrance and expenditure information. State and DIFR utility expenditures are monitored against budget to detect unanticipated dollar swings that might necessitate modifications to the planned allocation of resources.

A substantial amount of time and energy is devoted to processing employee and intercollegiate travel payments. Detailed explanations of State Audit and Control travel regulations, requirements and stipulations are provided as needed to individual travelers. Intercollegiate Athletic travel arrangements have their own unique rules and regulations and often require extensive coordination with outside agencies to come to satisfactory closure.

On a continual basis, authorization codes are issued to new employees for long distance business and personal telephone calls. On a monthly basis department heads are notified of their department's long distance business charges. Billing to departmental accounts is accomplished through the campus recharge billing system.

During the 2013-2014 fiscal year, the University Accounting Office was staffed by the Director, one Administrative Aide, and one Clerk 2.

Significant Accomplishments

- The University Accounting Office continues to lead the campus through the many challenging procedural changes caused by the implementation of the Office of the State Comptroller's (OSC) Statewide Financial System (SFS) on April 15, 2012.
- Accounting records for the fiscal year were completed and closed per System Administration deadlines without any lapsing State funds.
- The Director of University Accounting conducted campus-wide training sessions for the SMRT Web Application for reviewing online departmental accounting information.
- 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.
- OSC discontinued use of the Central Travel Account, so on July 31, 2013 State Travel and Non-Employee Travel Cards were introduced to the campus.
- The University Accounting Office's "**Green**" program included eliminating duplicate NCR Travel Authorization Forms and scanning all invoices sent out to the campus.
- The University Accounting Office continued to inform the campus at a training session with regard to updates on the State travel policy, and the issuance of Non-Employee Travel Cards. The University Accounting Office continually updates their webpage with new procedures and forms, providing departments easy access to the most current information.

Statistical Data

- Throughout the 2013-2014 fiscal year, 4,738 State vouchers were processed for payment totaling over \$19 million, and 17 petty cash checks were issued at a total dollar value of \$38.8 thousand (please refer to the chart below for transaction detail). Compared to last year, these figures represent a 2.8% decrease in the number of State vouchers processed with a 23.5% decrease in the dollar value of State voucher payments. In regards to petty cash, the number of vouchers processed decreased by 15.0%, with the dollar value increased by 12.9%, though the overall petty cash usage is low. The decrease in State vouchers processed and the low petty cash volume can be attributed to increased campus card usage for procurement, travel, and non-employee travel.

Vouchers Processed for 2013-2014						
Month	Quick Pay		Petty Cash		Totals	
	# of Vouchers	\$	# of Checks	\$	# of Transactions	\$
July	363	2,439,596.00	0	-	363	2,439,596.00
August	330	1,703,787.80	0	-	330	1,703,787.80
September	321	1,294,094.98	0	-	321	1,294,094.98
October	450	2,171,632.13	0	-	450	2,171,632.13
November	351	1,264,113.05	3	5,256.00	354	1,269,369.05
December	308	1,355,607.45	3	10,200.00	311	1,365,807.45
January	453	1,603,477.71	0	-	453	1,603,477.71
February	386	1,175,094.94	1	4,140.00	387	1,179,234.94
March	383	1,720,342.30	7	17,347.00	390	1,737,689.30
April	422	1,123,611.31	1	900.00	423	1,124,511.31
May	541	1,058,940.17	2	1,032.00	543	1,059,972.17
June	430	2,153,290.05	0	-	430	2,153,290.05
Total	4,738	19,063,587.89	17	38,875.00	4,755	19,102,462.89
Average	395	1,588,632.32	1	3,239.58	396	1,591,871.91

Vouchers Processed for 2012-2013						
Month	Quick Pay		Petty Cash		Totals	
	# of Vouchers	\$	# of Checks	\$	# of Transactions	\$
July	322	2,309,192.98	0	-	322	2,309,192.98
August	419	2,902,422.58	0	-	419	2,902,422.58
September	351	1,859,344.29	0	-	351	1,859,344.29
October	357	2,132,547.70	0	-	357	2,132,547.70
November	476	1,579,342.33	5	4,360.00	481	1,583,702.33
December	322	2,415,898.32	4	11,260.00	326	2,427,158.32
January	396	1,849,801.52	0	-	396	1,849,801.52
February	333	1,840,043.47	1	3,864.00	334	1,843,907.47
March	427	2,571,746.59	8	14,360.00	435	2,586,106.59
April	480	1,379,457.78	0	-	480	1,379,457.78
May	502	1,713,858.05	2	585.00	504	1,714,443.05
June	490	2,364,664.50	0	-	490	2,364,664.50
Total	4,875	24,918,320.11	20	34,429.00	4,895	24,952,749.11
Average	406	2,076,526.68	2	2,869.08	408	2,079,395.76

With the elimination of the Corporate travel card through the Central Travel Account (CTA), University Accounting experienced a 250% increase in the issuance of Travel and Non-Employee Travel (NET) Cards on campus.

Citibank Travel Card Usage

2013-2014

Statement Date	Athletics	Int'l Ed	CTA	President	Engagement	Academic Affairs	Student Affairs	University Advancemen	Finance & Administration	Other Funds			Statement Total
										Research	Foundation	FSA	
7/22/2013	\$4,168	\$4,201	\$2,170	(\$24)						\$384		\$487	\$11,386
8/22/2013	\$522	(\$812)	\$313		\$120	\$1,203	\$11			\$399			\$1,758
9/22/2013	\$2,665	\$1,500		\$326	\$202	\$2,452	\$790						\$7,936
10/22/2013	\$2,640	\$1,888		\$3,888		\$4,906	\$7,597		\$129				\$21,048
11/22/2013	\$3,161			\$1,304	\$2,126	\$3,477	\$7,616		\$248	\$669			\$18,600
12/22/2013	\$1,767	\$20,878		(\$1,988)		\$1,454	\$575	\$216		\$33	\$500		\$23,436
1/22/2014	\$5,767	\$628		\$801		\$1,460	\$50						\$8,706
2/22/2014	\$933	\$6,147	(\$15)	\$1,974		\$1,581	\$968	\$1,061			\$20		\$12,670
3/22/2014	\$1,993	\$2,005		\$1,323		\$5,427	\$0	\$213		\$949	\$195		\$12,105
4/22/2014	\$2,010	\$616		\$282	\$326	\$8,000	\$1,822	\$1,266					\$14,322
5/22/2014	\$1,185	\$222		\$380		\$14,527	\$2,221	\$331	\$456	\$1,110	\$244		\$20,676
6/22/2014	\$4,207	\$3,731		\$468	\$326	\$10,274	\$727		\$1,335	\$785			\$21,853
Usage	\$31,018	\$41,005	\$2,468	\$8,735	\$3,100	\$54,761	\$22,378	\$3,088	\$2,167	\$4,330	\$959	\$487	\$174,496

Citibank Non-Employee Travel Card Usage

2013-2014

Statement Date	Athletics	Int'l Ed	Academic Affairs	President	Engagement	Student Affairs	Finance & Administration	Music	Other Funds			Statement Total
									Research	Foundation	FSA	
9/6/2013	\$11,167											\$11,167
10/6/2013	\$11,137	\$1,700	\$799						\$191	\$533		\$14,360
11/6/2013	\$39,522	\$5,840	\$2,378							\$199	\$101	\$48,040
12/6/2013	\$23,072	\$24,270	\$1,572									\$48,914
1/6/2014	\$15,964	\$35,722	\$1,739									\$53,426
2/6/2014	\$69,013	\$1,911	\$11,970							\$375		\$83,269
3/6/2014	\$40,707	\$503	\$19,806			\$1,040		\$4,858		\$55	\$607	\$67,576
4/6/2014	\$35,807	\$14,415	\$5,292	\$1,881	\$1,713			\$8,409		\$492		\$68,010
5/6/2014	\$35,347	\$5,481	\$11,887				\$1,187					\$53,902
6/6/2014	\$9,979	\$97	\$5,720				\$239	\$319				\$16,354
Usage	\$291,715	\$89,940	\$61,164	\$1,881	\$1,713	\$1,040	\$1,426	\$13,586	\$191	\$1,653	\$708	\$465,017

Citibank Travel Card Usage

2012-2013

Statement Date	Athletics	Int'l Ed	CTA	President	Engagement	Student Affairs	Music	LLL	Other Funds			Statement Total
									Research	Foundation	FSA	
7/22/2012	\$1,668	(\$238)	\$1,473	\$1,937	\$1,379	(\$1)		\$3,174	\$13			\$9,403
8/22/2012	\$7,848	\$1,064	\$3,356	\$1,376	\$128	\$761		\$175				\$14,708
9/22/2012	\$22,872	\$1,747	\$8,973	\$134	\$650	\$309					\$543	\$35,229
10/22/2012	\$28,429	\$3,949	\$5,083	\$35	\$856	\$5,606						\$43,957
11/22/2012	\$28,975	\$37,729	\$5,682	\$98	\$347	\$5,031						\$77,862
12/22/2012	\$31,153	\$32,044	\$7,766	\$500	\$89	\$823			\$1,794			\$74,169
1/22/2013	\$26,189	\$25,736	\$3,230	\$819					\$961	\$157		\$57,092
2/22/2013	\$53,836	\$9,824	\$8,065	\$117					\$237	\$368	\$482	\$72,930
3/22/2013	\$25,355	\$45,591	\$20,426	\$1,540		\$154	\$7,890				\$62	\$101,017
4/22/2013	\$47,397	\$14,107	\$5,391	\$4,609		\$58	\$2,352		\$290			\$74,205
5/22/2013	\$23,626	\$27,693	\$7,369	\$125	\$610	\$3,964			\$862	\$6,606	\$300	\$71,155
6/22/2013	\$4,412	\$29,491	\$2,903	\$308	\$646	\$422			\$549		\$104	\$38,835
Usage	\$301,761	\$228,736	\$79,717	\$11,598	\$4,704	\$17,126	\$10,242	\$3,349	\$4,707	\$7,131	\$1,492	\$670,562

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, long distance telephone and photocopy pin codes, use of the SMRT Web accounting application, and paycheck distribution.

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 zero duplicate payments in the 2013-2014 fiscal year. There were seventeen payments issued through the Central Accounting System that resulted in Refunds of Appropriation (as compared to five in 2012-2013). The seventeen refunds encompassed the following: on Procurement Cards — one for a personal item, one registration not utilized, and five purchases that should have been paid by “other funds.” On Purchase Orders — two incorrect addresses in the SFS Vendor System, one overpayment, one canceled software agreement, one registration not utilized, one item never received, and three items returned for refund. On Employee Reimbursements — one was a canceled flight due to bad weather by which the employee was able to obtain a refund from the airline. As referenced above, refunds of appropriations were processed to restore funding in the appropriate accounts. As a means to reduce the risk of duplicate payments, departments are encouraged to use purchase orders or University procurement cards to obtain goods and services, as opposed to making a personal payment and subsequently filing a confirming requisition to obtain a reimbursement.

At every campus-wide training session offered for Travel and SMRT Web, evaluation forms were utilized to assess their content and presentation, obtain suggestions for improvements, and possible future topics. As a result of this feedback, the University Accounting Office targeted areas needing more emphasis at future presentations, and maintained “Green” in 2013-2014 by not printing and distributing the annual training information. Instead, participants were directed to University Accounting’s website.

Assessment Goals

- Continue to pay vendors in a timely manner to avoid costly interest penalties.
- Continue to closely monitor for duplicate invoice payments.
- Continue to be an integral member of the OSC statewide SFS implementation.
- Continue participation in the Business Intelligence Taskforce.
- Continue to utilize evaluation forms at all training workshops and incorporate viable suggestions into future sessions.
- Continue training workshops to assist departmental personnel in understanding the budget and accounting systems, and the proper completion of related paperwork.
- Continue to add 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).

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Environmental Health and Safety

ENVIRONMENTAL HEALTH AND SAFETY

Introduction

The Environmental Health and Safety Department (EH&S) is responsible for university campus-wide safety and compliance with federal, State, and local environmental and occupational safety regulations. The department is also ultimately responsible for fire safety, emergency planning and compliance issues relating to the State University of New York at Fredonia, and the NYS Uniform Building and Fire Code. In addition to compliance issues, EH&S is responsible for assessing, designing, and implementing programs that ensure the safety of the college community. EH&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 also provides shared services to community partners and colleges. EH&S is located in the Administrative Office Complex.



From left to right: Anne Podolak, Sarah Laurie and Gary Brittain

Mission Statement

The mission of the EH&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 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 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 and Safety'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, emergency response training, employee training and preparation of the campus for external environmentally-related government inspections.

Specific services provided by the Environmental Health and Safety Department include:

- Assess, design and implement all environmental, workplace, and fire safety training for the college community. Oversee campus regulatory compliance. Issue/review permits as required.
- Conduct fire, AED and workplace safety building inspections per requirements. Provide campus community with CPR/AED training.
- Provide guidance and oversight in the proper management and disposal of industrial, hazardous, universal, electronic, biological and radiological wastes generated on campus.
- Lead campus community in emergency planning and response training exercises. Arrange and work with college community to determine scope of emergency planning training.
- Develop a pro-active working relationship with all departments as it relates to new construction and regulatory compliance. Develop training programs for community members.
- Foster support and ensure compliance as it relates to working with outside contractors on the Fredonia campus.
- 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 university-wide environmental related answers to questions posed by all members of the university and surrounding community.
- Foster a team approach to working with the varying University departments to ensure chemical security and assist in the management of chemical 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.
- Calculate occupancy and square footage to meet occupancy needs in areas of public assembly on campus.



In fiscal year 2013-2014 Environmental Health and Safety consisted of three full-time employees, one part-time employee, and two student assistants.

Significant Accomplishments

- Continued to educate and utilize the NY-Alert mass notification system on campus. Currently, approximately 3,260 campus community members have signed up for Fredonia NY-Alert. Monthly internal tests are conducted for the system in addition to “all-campus” tests of the NY-Alert system conducted biannually. We are currently working on linking NY-Alert to social media sites.
- There were 150 people trained on CPR/AED for this 2014 fiscal reporting year. The number of people trained included outside community members, as well as campus employees.
- Addressed radioactive waste issues/radioactive closeout information with Scott Ferguson of the Biology department. Upon completion of the Science Center, Jewett Hall needed to be reviewed for radioactive exposure. At this point in time, the Department of Health has stated that we have no radioactive exposure issues there.
- Reviewed and replaced the current Emergency Planning Booklets. We provided over 750 booklets for areas of public assembly and departments on campus.
- Continued to improve and increase academic compliance and stewardship within the university campus environment. This year we expanded emergency planning and response by adding CERT training to the Fredonia campus. We hosted training for 18 college members.
- Over 76 RA's and RD's were trained on fire safety during the Fall 2014 semester.
- Campus policies consisting of HazCom 2012 and Bloodborne Pathogen programs were updated. Training was revised for these programs and added to the FREDtrain program on campus.
- Provided HazCom 2012, Emergency response review, and fire safety training for over 200 FSA employees. Other “shared services” included CPR/AED for EAP, Ariel lift, Bloodborne Pathogen, fire safety training for other campuses and local private schools.
- Continued to promote the Building Safety Coordinator Program by actively recruiting participants. Conducted training sessions for new Building Safety Coordinators. As of June 2014, there were 81 Building Safety Coordinators. Additional recruiting will continue to occur throughout the semester.
- Conducted an emergency training exercise that included a room/content fire in a residence hall. The team functioned well. Objectives were developed/debrief occurred. Outcomes are continuing to be addressed.
- Developed and assisted with implementation of online FREDtrain Haz/Com 2012/Right-To-Know training for all campus employees. Our success rate was approximately 100% among faculty and staff.
- Developed an emergency planning training matrix which outlines all required and best practice training across campus for each calendar year. Programs are expanded as required.
- Developed MOU sheltering agreement with the Red Cross. Red Cross is in the process of reviewing the document.
- Inspect, tag, and service 1,500 fire extinguishers, 855 pull stations, and 108 AED's located throughout campus. Review new buildings to add mandated equipment. At this point, five AED's were added to the Science Center, and one to the University Village Townhouse complex. We are in the process of adding 50 additional fire extinguishers to the Townhouse complex.

- Conducted annual State fire inspection. This inspection encompasses the entire campus and its off-site buildings. The inspection normally takes two weeks to complete. There are additional days (usually two) for re-inspecting the non-compliance areas.
- Expanded safety training to include the visual arts departments. Also assisted visual arts with accreditation concerns.

Statistical Data

* indicates training not conducted annually

Training Program	Number of Employees Trained	Number of Employees Trained	Number of Employees Trained
Fiscal Year	2012	2013	2014
Aerial Lift	38	*	73
Asbestos Awareness	webpage	webpage	83
H1N1 Awareness	webpage	webpage	*
Avian Flu Awareness	webpage	webpage	34
Bloodborne Pathogen Training	118	147	188
Building Construction Renovation & Permit Training	*	*	*
Building Inspections	48	34	49
Chemical Safety Training –Chem. Hygiene Program	96	40	52
Chemical and Oil Spill Information	*	92	83
Compressed Air	7	27	28
Confined Space Safety	*	*	*
CPR/AED/First Aid	9 SUNY Lifesaver 64 AHA CPR/AED	78	158
EHS Awareness	28	28	*
Electrical Safety	2	31	34
Emergency Response	6	135	192
Ergonomics & Assessments	*	6	42
Evacuation Plan	244	260	236
Fall Protection	0	0	60
Fire Extinguisher Use	68	157	131
Fire Safety	417	260	262
Fredonia Fire Department	*	*	*
Fork Truck	30	*	22
Fume Hood Testing	*	57	*
Hazardous Waste Management	*	140	*
Hearing Conservation	*	*	42
Heat Stress/Heat Exhaustion Awareness	*	41	34
Hotwork Permits	12	22	15
ICS-200	*	*	*
Chart cont'd on next page...			

Continued...	2012	2013	2014
Incident Command System (ICS-100/700)	45	*	*
ICS-701.a,- 702.a,-703.a,-704 Public Information Officers	2	*	*
Laboratory Safety & Security	*	92	*
Ladder Safety & Security	96	*	29
Lead Awareness	14	14	13
Lockout/Tagout	2	31	27
Lyme Disease Awareness	*	19	34
Machine Guarding	8	*	4
NYS Right-to-Know	703	*	*
Oil SPCC	9	92	90
Pandemic Flu Awareness	*	*	*
Pesticides	*	*	*
Power/ Hand Tool	8	*	34
Powered Industrial Vehicle	*	*	*
Personal Protective Equipment	*	260	300
Rabies Awareness	*	19	34
Radiation Safety	*	*	*
Reach Truck	*	*	7
Respiratory Training and Fit Testing	*	*	9
RCRA Online	6	92	18
Safe Lifting	105	92	87
Scaffolding Safety	9	*	14
Slips, Trips and Falls	*	*	60
Theatre Rigging Training	*	*	*
Trenching/Shoring	*	*	*
Universal Waste Management	96	92	101
West Nile Virus Awareness	*	19	34
Work Zone /Flagger	25	*	40

Fire Code Violations

INSPECTION YEAR	NUMBER OF VIOLATIONS
2014	258
2013	208
2012	196
2011	253

Tent and Hotwork Permits

PERMITS	TOTALS
Hot Work Permits	33
Tent Permits	12

Chemical Waste Disposal

WASTE DISPOSAL	POUNDS
Asbestos Waste	9 pickups
Hazardous Waste	2,615 pounds of hazardous waste
Medical Waste	233.6 pounds
PCB Waste	2,000 kilograms
Universal Waste / Batteries / light bulbs	

Shared Services

- SCUBA Code in-service program. Two programs are hosted annually — one at Fredonia and one in Albany. We are currently working on an additional program for the City of Buffalo.
- Emergency Procedure Booklet was updated for the campus. This booklet now includes information regarding tornado warnings and the procedure for an active shooter situation. University of Buffalo and Jamestown Community College's emergency planning was assisted by EH&S.
- BOWMAC software program was updated and shared with various SUNY colleges that had requested information regarding this emergency planning software package and the services it provides.
- HazWopper Training in partnership with Genesee Community College was hosted in April 2014.
- A contract was established for the Western NY Consortium regarding regulated medical waste. Numerous mandated trainings such as CPR/AED, HazCom2012, BBP training, and fire safety were held for schools in the region.

Assessment Update

Assessment Statement

The Environmental Health and Safety department provides a pro-active, synergistic working relationship among the various departments on campus to assess, design and implement campus compliance and safe work practices, in an effort to continue the quality and high level of standards that the Fredonia community has come to expect.

EH&S continues to assess campus activities to develop and enhance training, chemical tracking, training databases, and emergency planning resources that will allow assessment on a periodic basis. Initiatives this reporting period have also included campus program revisions and additions as required by EPA, DEC, DOL, and SUNY regulations.

Assessment Activities

- New changes in regulations have required updating in policies and training. HazCom 2012 has replaced the federal Hazard Communication Standard. Fredonia's Bloodborne Pathogen Policy was also updated. Trainings were modified to reflect the new changes in the policies.
- Reviewed dynamics of the Sustainability Committee, offering suggestions that integrate the climate action plan into the committee structure; ultimately the subcommittees will use the climate action plan to aid in setting up their 2014 goals and metrics. The Sustainability Committee will be working toward increasing campus community education efforts and encouraging positive behavior change.
- Continued to assess the CPR/AED program using surveys to continually enhance and improve the CPR/AED training program. The American Heart Association is the agency which Fredonia will continue to use to train the campus, and the community.
- Provided in-person education of the function of EH&S to both new employees and graduate assistants. We have introduced mandated training via the campus' online program, FREDtraining. HazCom 2012 was added along with Bloodborne Pathogen, and Kitchen Fire Safety.
- Assessed campus-wide regulatory compliance and safety training, and updated workplace compliance training as required. Training included, but was not limited to Fire Safety, asbestos awareness, compressed air, hearing conservation, PPE, aerial lift training, RPP, lab safety, RCRA and fire extinguisher training. These are a variety of training classes conducted throughout the campus.
- Conduct monthly and semi-annual tests of the mass notification system (NY-ALERT) on campus.
- A new report was filed with the Association for the Advancement of Sustainability in Higher Education (AASHE) earning Fredonia a Bronze rating from the Sustainability Tracking and Rating System (STARS).
- A free ride-sharing program was started on campus. FredRide currently has 121 members of the campus community registered.
- NY State Fire Inspection — most of the focus was on student residence hall rooms (tapestry's, candles, and multi-plugs) with follow-ups on corrections.
- We filed 33 tent permits and posted locations with fire extinguisher and exit signs.

Assessment Goals

- Continue to increase NY-Alert participation by conducting various announcements through Public Relations, meeting notifications, distribution lists, flyers, webpage and student email.
- Increase participation in the CPR/AED program by enhancing training opportunities, presentations, website information, newspaper, and email to community members.
- Continue to conduct emergency planning and response training exercises and promote emergency planning training on campus, and to the community.
- Continue to monitor contractor work as well as in-house on campus work as it relates to safety. New guidance was established this year for work areas in which evacuation alarm monitoring had been turned off.

- Provide additional services and training for emergency planning. We trained 18 employees in CERT (Citizens Emergency Response Team) on campus and will utilize them as requested.
- Coordinate and implement training for FSA and Visual Arts employees.
- Benchmark keystone STARS credits with other State University of New York campuses.
- Explore solar and water reclamation options for the campus.
- File Tree Campus USA application.
- Design a Sustainability House program through which students with common interests in sustainable living can live and learn collectively.
- Develop means to quantitatively measure progress of campus initiatives.

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 Five-Year Capital Plan and works closely with the Vice President for Finance and Administration and the President in developing capital facilities priorities. The upcoming fiscal year will see more involvement in campus construction in the areas of minor and major rehabilitation and in-house construction, as well as many design projects.



From left to right: Lori Johnson, Markus Kessler, Shannon Moore and Gretchen Fronczak

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 Assistant Director oversees solicitation and administration of construction/consultant contract services for both Facilities Planning and Facilities Services Departments. In addition, this position addresses project funding issues, and identifies and implements administrative procedures and operations. A full-time Capital Project Assistant provides administration support of construction/consultant contracts and project site support. A full-time Capital Project Manager 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. A full-time Secretary, with the assistance of one .5 Student Assistant, provides the necessary administrative support required of the department and all associated activities.

Significant Accomplishments

The 2013-2014 Annual Report for the Facilities Planning Department highlights many accomplishments including:

- Progression of the administration of 34 consultant and construction contracts for both Facilities Planning and Facilities Services totaling \$4.6M. Ten contracting activities (out of a total of 34) were processed in direct support of Facilities Services operations.
- Completed and occupied several major projects. These are highlighted in the following sections of this report and totaled \$91,500,000.
- Design and construction continue on new major projects. These are highlighted in the following sections of this report and total \$70,000,000.

1. Academic/Administration/Infrastructure Projects

- Studies and Reports:
 - None
- Planning:
 - SUCF Five-Year Capital Plan.
 - Academic Space Study: Scoping work and consultant services.
- There were five projects in design or bid-ready for a total of \$44,900,000.
- There were two projects in construction for a total of \$37,400,000.
- There were two projects completed for a total of \$61,100,000.

Capital Projects in Design or Bid-Ready	Capital Projects in Construction	Capital Projects Completed
Houghton Hall Rehabilitation	Rockefeller Arts Center Addition	Science Center
Dods Hall Exterior Rehabilitation	Upgrade Elevators Various Buildings	Steele Hall Bleacher Replacement
AHU & Controls Upgrade – Bid Ready		
McEwen Hall Exterior Rehabilitation		
Rockefeller Arts Center Third Floor HVAC/Sprinklers		

Academic Major Commissions

- **Science Center Building**



The construction of the Science Center Building provides additional space to house the Departments of Biology, Chemistry and Science Education. The building allows for the redistribution and consolidation of academic departments and increases the utilization of existing buildings. This building will provide students and faculty with a stimulating, collaborative, and technology-focused environment.

Situated adjacent to Houghton Hall, the building is massed and sited such that it completes the larger quad Honey Locust tree grove to its northwest creating a more intimate “Science Court” in connection with Houghton Hall, and maintains a maximum of open land to its south.

The design forms a landscape court between the new building and Houghton Hall, which acts as a unifying element within the “Science Complex”. It consists of a series of diagonal paving strips and layers of vegetation that gesture to the surrounding landscape while creating intimate gathering and learning spaces.

The three-story structure consists of a double loaded corridor with teaching labs and shared research labs on the northern side, and a combination of individual research labs and offices on the southern side. Offices are distributed evenly throughout the main structure. Their periodical alternations with research labs form informal study alcoves along the main corridors.



The ground level is occupied by a mix of departments and common areas. It includes Geology and Science Education spaces. Biology labs, offices, and support spaces occupy the second floor while Chemistry counterparts occupy the third.

Most public functions are located around the main entry in the one to two story protruding volume. The main administration spaces share a suite at the second level, easily accessible from the lobby. Lounge spaces are located centrally, near the atrium, on all floors.



The project Architects are Mitchell Giurgola Architects, LLP of New York, New York. LeChase Construction Services, LLP of Rochester, New York provided construction management services. The Pike Company of Rochester, New York was the General Contractor. The project budget was \$60,000,000. Construction began in early July 2011 and was beneficially occupied in mid-August 2014.



- **Rockefeller Arts Center Addition**



The Rockefeller Arts Center, built 42 years ago to accommodate a Department of Visual Arts enrolling 200 students, currently serves more than 400 full-time students, and as well houses the Department of Theatre and Dance requiring practice dance studios for a recently approved BFA in Dance; it also needs computer labs to support growing Graphic Design, Media Arts, and Animation programs. The campus academic master plan identified the development of a comprehensive Dance major as a top priority. While a small Dance program has recently been

approved, development of the comprehensive program requires more dance studio space. This addition would enable the University to provide a complete offering of all professional performing arts programs. An academic addition to the Rockefeller Arts Center will enable Fredonia to provide a full spectrum of professional performing and visual arts degrees, while improving the quality of the existing academic offerings.

The addition will allow for the redistribution and consolidation of academic departments and increase the utilization of the existing building. This addition will help in providing students and faculty with a stimulating environment as well as providing a facility that could operate year-round, to serve not only the academic calendar but also serve a diverse group of programs, including student summer programs, education workshops, summer camps and local community programs.



The following objectives, developed by Fredonia, include:

- Providing Dance Studios (non performance spaces); providing Computer Labs to support Media Arts, Illustration and Animation, and Graphic, Costume, and Scenery Design.
- Providing Studios to support Sculpture and Ceramics.
- Providing Rehearsal Rooms to support Theater.
- Providing connecting link to Mason Hall.
- Providing Faculty Offices.



Due to State Funding issues the bid phase was pushed back one year. The State University Construction Fund received bids in mid December 2013 and construction began in May 2014.

The project was designed by Deborah Berke & Partners Architects of New York, New York. Campus Construction Management Group of Amherst, New York is providing construction management services. Northland Construction of Syracuse, New York is the General Contractor. The project budget is \$36,000,000 and is scheduled to be completed the summer of 2016.

2. Residence Life Projects

- Studies and Reports:
 - None
- Planning:
 - Residence Hall Capital Plan
- There are two projects in design for a total of \$2,750,000.
- There is one project currently in construction for a total of \$250,000.
- There were three projects completed for a total of \$31,750,000.

Projects in Design or Bid-Ready	Projects in Construction	Projects Completed
Andrews Complex Window Replacement Phase I – IV (Phase II – Schulz Hall)	Hemingway Hall Elevator Upgrade	Fredonia Townhouse
Kirkland Complex Roof Replacement		Disney Hall Lobby Upgrade
		Andrews Complex Window Replacement Phase I – Igoe Hall

Residence Life Major Commissions

- **Fredonia Townhouse**



Fredonia strives to provide a comprehensive residence life program as an integral part of the educational program and academic support services of the institution. There are 14 Residence Halls conveniently

located for students to choose from. These halls consist of five single sex and nine coeducational buildings. Students also have a choice of corridor, suite, kitchen-suite, or independent living. The main benefit of living in a residence hall is convenience. Living right on campus, in the middle of everything, is the best and fastest way to become a part of Fredonia. The Residence Life staff is dedicated to providing essential services for resident students and fostering an environment that promotes personal and community development.

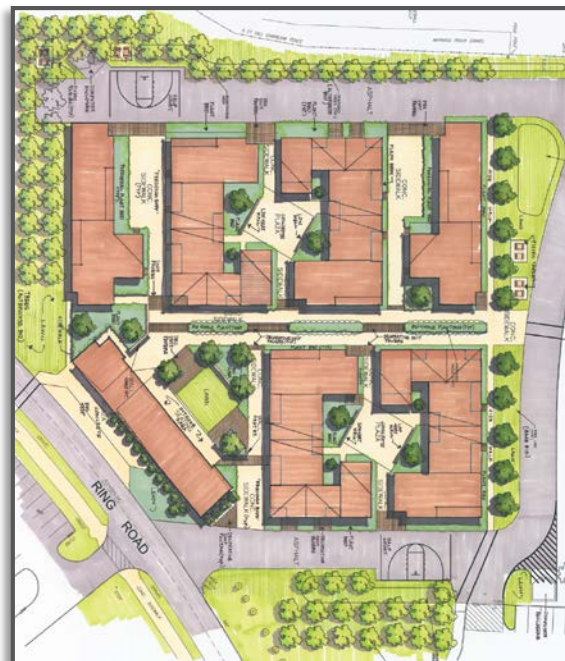


Construction of the townhouse style residence halls were completed in August 2014 and provide housing for up to 200 residents. There are six resident buildings consisting of three apartment styles (single level, two level and three level apartments) with a front porch. Each apartment style independent living unit consist of a kitchen, living/dining area, four single bedrooms, two

bathrooms and a laundry area. In addition, each building is ADA accessible and also provides storage, CTV, data and communications.

A separate community/multi-purpose building adjacent to the townhouses provides meeting spaces, study areas, and recreational activity. The project site consists of a common green space (quad), pedestrian pathways, and existing parking located to the northwest and east as well as the Ring Road lot. To meet storm water management practices small water features are a part of the landscape design. The Townhouses will deliver all the benefits of on-campus living with all the amenities of an off-campus lifestyle, as well as provide students with the opportunity to learn self responsibility along with shared responsibility.

The project was designed by Chaintreuil Jensen Stark Architects of Rochester and Buffalo, New York with the assistance of DASNY. Construction was performed by Burgio & Campofeille Inc. from Cheektawaga, New York. The project budget was \$30,000,000.



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. Fredonia has been recognized as carrying one of the largest workloads of Campus Let projects among all 64 SUNY campuses. Staffed with the knowledge and expertise to administer this program at the campus level, our campus receives additional funding to accommodate a greater 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 \$4.6 million. While an average contract can take six to ten weeks to process from solicitation through award, and an average change order can take four to six weeks to process, the current workload would indicate that Facilities Planning *initiates* approximately .64 new contracts and/or change orders per week, 52 weeks per year. Most contracts are rarely “average” and some may even take months to negotiate before final approval is obtained — needless to say there is a number of contracts in varying stages of progression that are occurring at the same time. An additional consideration is that this function does not end there. Facilities Planning tracks contracts after award through completion. It is not uncommon for a design contract to extend over the course of several years.
- Facilities Planning continues working with SUCF and campus staff to complete and close out projects for the 2008-2013 capital plan. The current 2013-2018 plan consisted of 45 projects with a total budget of \$69,285,000.
- 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.
- Facilities Planning is currently working with SUCF to establish scope of services for Academic Space Study.

- Major Capital Plan design starts for 2013-2014 include the following projects:
 - Houghton Hall Rehabilitation Project.
 - Dods Hall Exterior Rehabilitation Project.
 - McEwen Hall Exterior Rehabilitation Project.
 - RAC Third Floor HVAC and Sprinklers.
- Major Residential design starts for 2013-2014 include the following projects:
 - Andrews Complex Window Replacement Project Phase II Schulz Hall.
 - Kirkland Complex Roof Replacement.
- Various design/construction activities were progressed and/or completed during the past fiscal year. Close coordination was maintained with the Construction Fund and DASNY, as well as the campus to ensure regulatory requirements were met and that all construction activities have been designed to meet the needs of the campus constituents. Projects progressed and/or completed include:
 - Andrews Complex Window Replacement Phase I — Igoe Hall — Construction completed August 2014.
 - Disney Hall Lobby Upgrade — Construction completed August 2013.
 - Science Center — Construction completed August 2014.
 - Townhouse Residence Hall — Construction completed August 2014.
 - RAC Addition and Rehabilitation — Construction began April 2014.
 - Elevator Upgrades Various Buildings — Construction began June 2014.
 - Design starts include Andrews Complex Window Replacement Phase II Schulz Hall, Kirkland Roof Replacement, McEwen Hall Exterior Rehabilitation, Rockefeller Arts Center Third Floor HVAC/Sprinklers, Dods Hall Exterior Rehabilitation and Houghton Hall Rehabilitation.
- During the 2013-2014 Fiscal Year, 34 construction and consultant contracts and formal change orders were in varying stages of solicitation/contract award by Facilities Planning. The volume of contracts during this fiscal year decreased by a total of 39 from the previous fiscal year; the total dollar value of contracting activities during the 2013-2014 fiscal year totaled \$4.6 million. Of this total, \$500 thousand represents 11 contracting activities (out of a total of 34) that were processed in direct support of Facilities Services operations. Following State regulations, fully administered contracts consist of all stages of advertising, bidding/solicitation, bid reviews, and contract administration for approval on campus. The Office of the State Comptroller and Attorney General approval is no longer needed on construction and design contract; however they are subject to their review and approval at any time. These projects consist of those that are funded through DIFR funds, Minor Rehab and Repair, Capital funding, and in-house sources. Refer to 2013-2014 Campus Let Design and Construction Projects Report and chart page entitled Campus Let Construction and Design Contracting Activities.
- Facilities Planning continues to track the progress of projects administered by the Dormitory Authority. All projects previously identified for closure with unexpended funds identified for the return to campus have been completed. Facilities Planning also continues the closeout process with the Construction Fund with all closeouts current as of this fiscal year end.
- Facilities Planning along with Facilities Services, Finance and Administration and the Construction Fund are continuing to refine the 2013-2018 Campus Capital Plan to fit

within yearly spending caps and to establish funding requirements for major capital projects. The 2013-2018 Plan is the fourth consecutive multi-year plan which has allowed 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 plan identifies several Special Project Initiatives such as Houghton Hall Rehabilitation, Academic Space Study for Renovations of Jewett Hall for Academics in lieu of New Academic Building, and the Welcome Center Project. This new plan has identified approximately \$112.7 million of critical maintenance projects and adaptation projects, and \$34 million in special initiative projects.

- Among the 64 campuses, Fredonia's Facilities Planning Department continues to administer one of the most active Campus Let project programs.
- 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 17 building permits, and seven 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 (2013-2014), Campus Let Design and Construction Projects Report, and related charts illustrating unit support and volume/value increases 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 2012-2013 Annual Report and Assessment Update:

- Completed design and construction of the Andrews Complex Window Replacement Phase I Project.
- Completed Construction of the Fredonia Townhouse Project.
- Completed Construction of the Disney Hall Lobby Upgrade Project.
- Began construction of the the Rockefeller Arts Center Addition and Rehabilitation Project.
- Began construction of the Elevator Upgrade — Various Buildings Project.

- Began design of the Andrews Complex Window Replacement Phase II Project.
- Began design of Kirkland Complex Roof Replacement Project.
- Began design of the Houghton Hall Rehabilitation Project.
- Began design of the Rockefeller Arts Center Third floor HVAC/ Sprinkler Project.
- Began design of McEwen Hall Exterior Rehabilitation Project.
- Began design of the Dods Hall Exterior Rehabilitation Project.

Assessment Goals

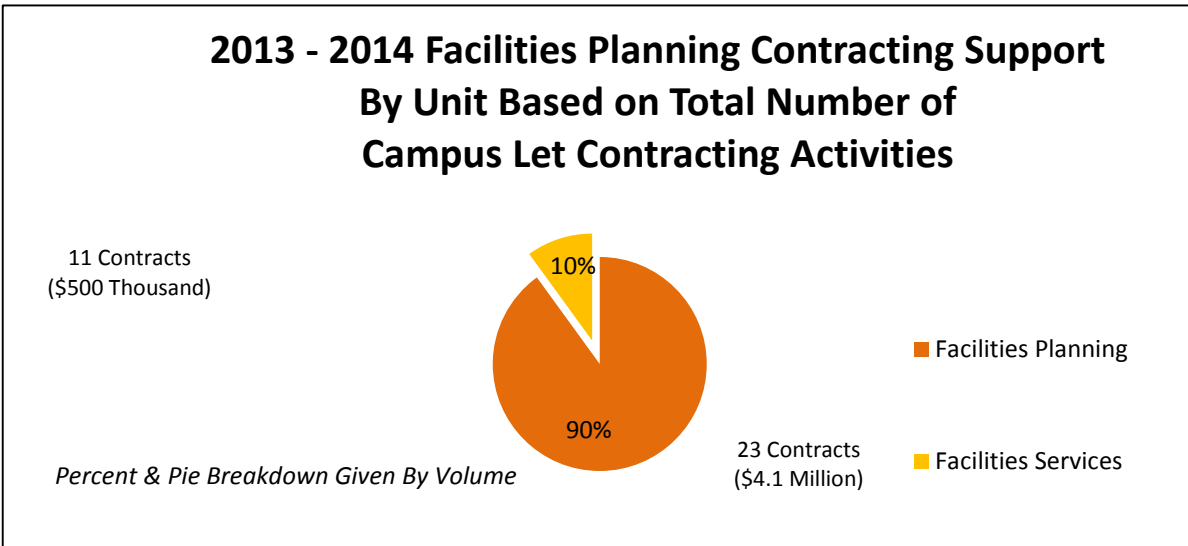
- Work with all entities involved in the implementation of projects identified in the next Five-Year Capital Plan.
- Continue to progress ongoing projects and identify and address those not already identified. Ensure close coordination with those affected by the planning and construction, and maintain 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 and begin construction of the Andrews Window Replacement Project Phase II.
 - Complete construction of the Hemingway Hall Elevator Upgrade Project.
 - Complete design of the McEwen Hall Exterior Rehabilitation Project.
 - Complete construction of the AHU and Upgrade Controls Project.
 - Complete construction of Elevator Upgrades Various Buildings Project.
- Continue to provide support to newly identified priorities in an effort to obtain funding toward the continuous advancement of campus facilities and grounds. Continue working towards establishing the next 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.

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Summary of Facilities Planning Capital Projects 2013-2014

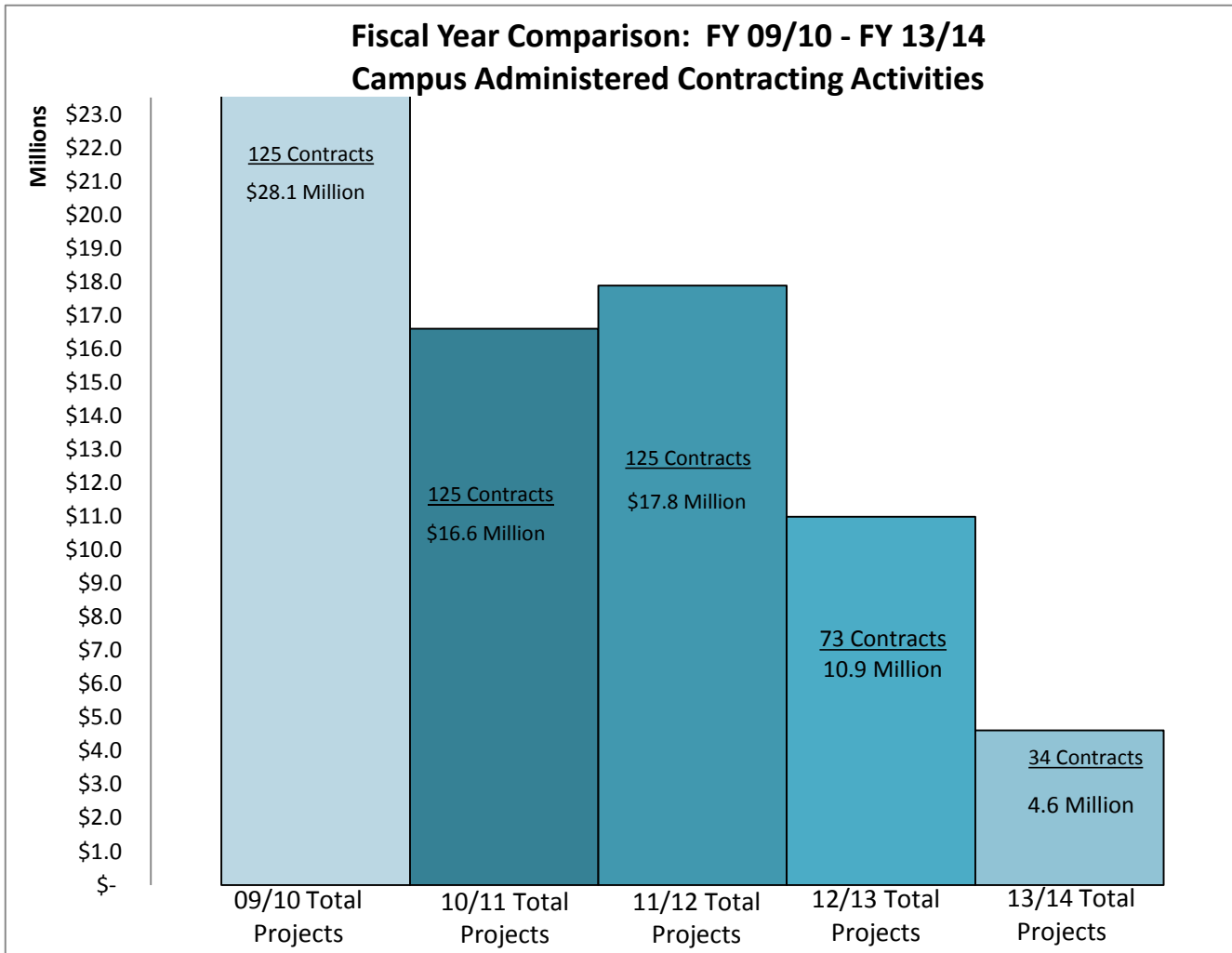
Project Description	Estimated Cost	Project Status	Contractor
<u>I. Academic/Administrative Buildings</u>			
Science Technology Center	\$60,000,000	Punch List	The Pike Company Northland/Campus
Rockefeller Arts Center Addition	\$36,000,000	Construction	Construction
Field House Bleacher Replacement	\$2,300,000	Completed	Picone Construction
McEwen Hall Exterior Rehabilitation	\$4,600,000	Design	Bell & Spina
Houghton Hall Renovations	\$33,000,000	Design	Mitchell Guigola
Upgrade Elevators Various Building	\$1,400,000	Construction	Concept Construction
Rockefeller Arts Center-3rd Floor HVAC/Sprinklers	\$4,100,000	Design	M/E Engineering
<i>Subtotal - Academic/Administrative Buildings</i>	<i>\$141,400,000</i>		
<u>II. Residence Hall</u>			
Townhouse Residence Hall	\$30,000,000	Punchlist	Burgio & Campofelice
Hemingway Hall Elevator Upgrade	\$250,000	Construction	Spicer Group
Andrews Complex Window Replacement (Phase I Igoe Hall)	\$6,100,000	Construction	Windows Specialist
Disney Hall Lobby Upgrade	\$550,000	Design	RB Mac
Kirkland Roof	\$1,500,000	Design	Young & Wright
<i>Subtotal - Residence Halls</i>	<i>\$38,400,000</i>		
<u>III. Parking Lots and Roadways- Other Site/Infrastructure</u>			
Rehabilitation/Upgrade Elevators	\$3,000,000	Construction	Concept Construction
Replace AHU's & Controls Phase I	\$3,000,000	Design	Wendel Companies
<i>Subtotal - Other Site/Infrastructure</i>	<i>\$6,000,000</i>		
<i>Total Construction Cost</i>	<i>\$185,800,000</i>		

CAMPUS LET CONSTRUCTION AND DESIGN CONTRACTING ACTIVITIES

The following chart shows the distribution of design and construction campus-administered contracting activities provided by Facilities Planning in support of Facilities Planning and Facilities Services



The following chart shows the level of increase in both volume and dollar value for design and construction campus-administered contracting activities provided by Facilities Planning comparing five consecutive fiscal years

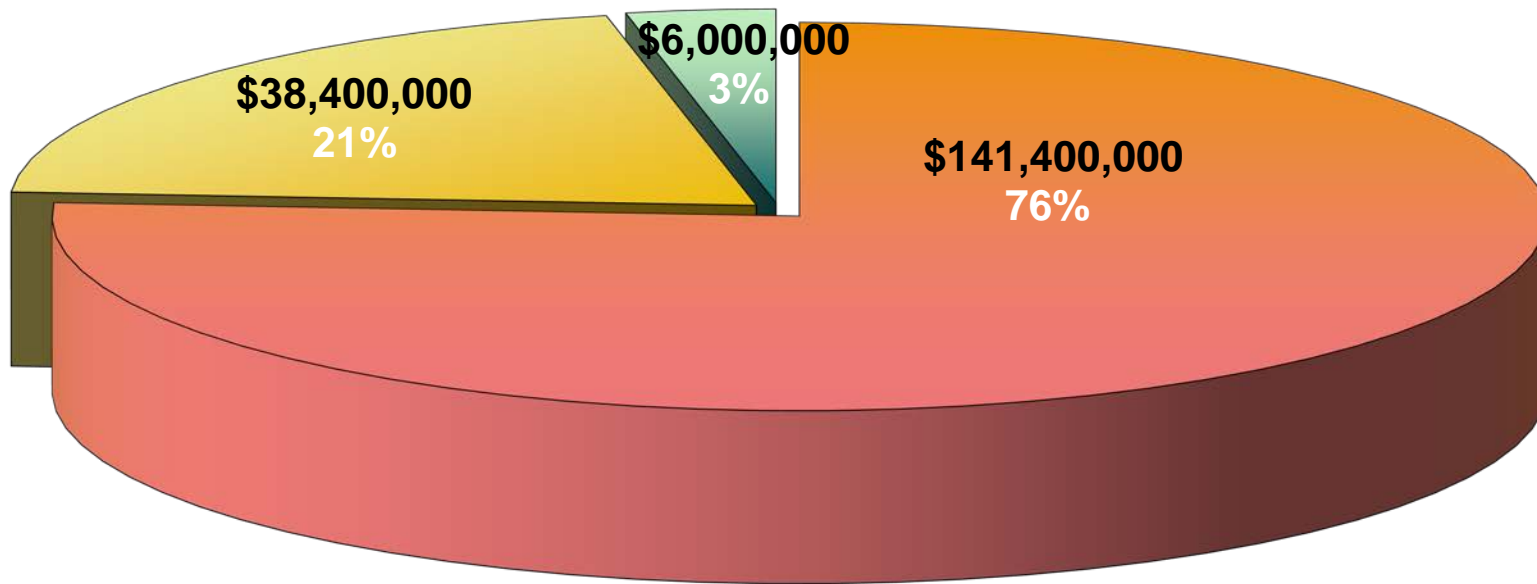


State University of New York at Fredonia
 Facilities Planning Office
SUMMARY OF CAPITAL CONSTRUCTION PROJECTS

	PROGRAM BUDGET	PROJECT STATUS
I. ACADEMIC / ADMINISTRATIVE BUILDINGS		
Science Technology Building	\$ 60,000,000.00	Punch List
Rockefeller Arts Center Addition	\$ 36,000,000.00	Construction
Field House Bleacher Replacement	\$ 2,300,000.00	Construction Complete
McEwen Hall Exterior Rehabilitation	\$ 4,600,000.00	Design Underway
Houghton Hall Renovations	\$ 33,000,000.00	Design Underway
Upgrade Elevators Various Building	\$ 1,400,000.00	Construction
Rockefeller Arts Center-3rd Floor HVAC/Sprinklers	\$ 4,100,000.00	Construction
	\$ 141,400,000.00	
II. RESIDENTIAL REHABILITATION		
Townhouse Residence Hall	\$ 30,000,000.00	Punch List
Hemingway Hall Elevator Upgrade	\$ 250,000.00	Construction
Andrews Complex Window Replacement (Phase I Igoe Hall)	\$ 6,100,000.00	Construction
Disney Hall Lobby Upgrade	\$ 550,000.00	Design Underway
Kirkland Roof	\$ 1,500,000.00	Design Underway
	\$ 38,400,000.00	
III. OTHER SITE/INFRASTRUCTURE		
Rehabilitation/Upgrade Elevators	\$ 3,000,000.00	Construction
Replace AHU's & Controls Phase I	\$ 3,000,000.00	Design Underway
	\$ 6,000,000.00	
PROJECTS -- GRAND TOTAL	\$ 185,800,000.00	

CAPITAL CONSTRUCTION PROJECTS

Total Program Budget: \$185,800,000.00



- ACADEMIC ADMINISTRATIVE BUILDINGS -- Consists of new construction and renovations in academic 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

Construction and Design Projects

Facilities Planning Construction Projects (July 2013 – June 2014)		
Project #	Project Title	Cost
05324	Bleacher Replacement - Steele Hall	\$876,830.00
05324	CHANGE ORDER #1	\$11,482.57
05324	CHANGE ORDER #2	\$13,738.33
05331	Rehabilitation Dods Hall Fitness Center - CHANGE ORDER #5	\$123,882.78
05331	CHANGE ORDER #6	\$13,344.61
D059EK	Kirkland Complex Window Replacement, Phase IV - Disney	\$961,000.00
D059EK	CHANGE ORDER #1	-\$11,400.00
D059FY	Hemingway Hall Elevator	\$143,000.00
D059FY	CHANGE ORDER #1	\$0.00
D059FY	CHANGE ORDER #2	\$41,307.00
D059FZ	Disney Hall Lobby Upgrade	\$412,450.00
D059GA	Andrews Complex Window Replacement Phase I - Igoe	\$1,054,000.00
D059GB	Gregory Hall Stair Replacement	\$234,420.00
	TOTAL:	\$3,874,055.29

Facilities Planning Design Projects (July 2013 – June 2014)		
Project #	Project Title	Cost
05324	Field House Bleacher Replacement-AMENDMENT #2	\$0.00
05331	Rehabilitation Dods Hall: Fitness Center-AMENDMENT #3	\$42,143.13
05337	Replace AHUs and Controls-AMENDMENT #1	\$0.00
05350	President's House Air Conditioning	\$38,197.50
D059EK	Kirkland Complex Window Replacement-AMENDMENT #1	\$0.00
D059FY	Hemingway Hall Elevator Upgrade	\$24,090.99
D059FY	AMENDMENT #1	\$0.00
D059FZ	Disney Hall Lobby Upgrade	\$81,412.52
D059FZ	AMENDMENT #1	\$0.00
D059GB	Gregory Hall Stair Tower	\$51,130.02
	TOTAL:	\$236,974.16

Facilities Services Construction Projects (July 2013 – June 2014)		
Project #	Project Title	Cost
D059FV	Andrews Complex Lighting Rehabilitation-Phase II	\$63,900.00
D059GG	Kirkland Complex Lighting Rehabilitation-Phase I	\$57,000.00
I286ST	Campus Roadway and Parking Lot Asphalt Install	\$114,475.00
I287ST	Campus Roadway Asphalt Replacement 2014 -Rebid	\$46,300.00
M05409	Maytum Hall Computer Center Replace A/C Ph. III CO #2	\$7,540.00
M05414	Maytum Hall Basement Structural Repairs	\$62,556.00
M05414	CHANGE ORDER #1	\$14,992.40
M05416	Jewett Hall 101 Lighting Improvements	\$23,400.00
M05418	Mason Hall Recital Hall Reheat Boiler/Humidifier	\$58,250.00
M05419	Thompson Hall CF-5 HVAC Modifications	\$58,700.00
	TOTAL:	\$507,113.40

Facilities Services Design Projects		
Project #	Project Title	Cost
05317	Masonry Repairs - Various Buildings - AMENDMENT #3	\$1,631.80
	TOTAL:	\$1,631.80

	34 Projects Total TOTAL:	\$4,619,774.65
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Facilities Services

- **Capital Projects/Energy Management/HVAC**
 - **Building Automation Systems**
 - **Heating / Refrigeration/Air Conditioning Services**
- **Custodial Services**
- **Facilities Trades Services**
 - **Electrical and Plumbing Services**
 - **Grounds and Landscaping Services**
 - **Structural Trades**
- **Office Operations**
- **Technical Services**

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 144 full-time permanent, part-time and seasonal employees. Numerous students during the academic year



From left to right: Kevin Cloos, Mike Jackino, Bob Lawson, and Mark Delcamp

and summer months provide additional support staffing to the department. The department maintains 2,091,080 gross square feet of buildings; 256 acres of land; 24 acres of parking lots with 3,087 parking spaces; over five miles of roadways; over eight miles of sidewalks, and cleans 1,859,525 net square feet of academic and residential building area. The department services and maintains over 10,000 energy management control points; 6,000 fire alarm devices; 5,000 doors; 2,500 clocks; 1,700 motors; 490 street lights; 74 boilers; 63 hot water heaters; 46 fire hydrants; 32 elevators; 23 emergency generators; 265 outdoor emergency phones, and over 20,000 light fixtures.

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

1. Capital Projects, Energy and HVAC
 - a. Building Automation Systems
 - b. HVAC/R (Heating Services / Refrigeration / Air Conditioning)
 - c. Project Management
2. Custodial Services
 - a. Cleaning and Minor Maintenance
 - b. Moving and Event Setup
 - c. Flooring and Window Treatment Installations
3. Facilities Trades Services
 - a. Electrical and Mechanical Services (Electrical and Plumbing)
 - b. Grounds and Landscaping Services and Athletic Field Management
 - c. Structural Trades (Carpentry / Masonry / Lock Shop / Painting / Roofing)
4. Office Operations
 - a. Work Order Processing and Key Management
 - b. Purchasing and Requisitioning

- c. Personnel Record Management
- 5. Technical Services
 - a. Access Control / CCTV Network (Non Residential)
 - b. Work Order System and Physical Space Inventory Management
 - c. 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 9,000 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, then budgets 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 capital construction 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

- Received the Exemplary Service Award from the Fredonia Education Development Program in recognition of the support and dedication of the department in helping EDP accomplish its mission.
- Prepared the project request information for the State University Construction Fund for the 2014/2015 Minor Critical Maintenance program totaling \$616,000.
- Successfully coordinated the Annual Community Electronic Recycling Day and provided assistance with many events as part of Earth Week.
- The department conducted a campus wide customer satisfaction survey, seeking our customers' perspective and assessment of the custodial, maintenance and grounds services operations.
- Successfully transitioned the department to a new more user-friendly online work order system; averaging 40 to 50 work requests per day.
- Completed the replacement of all banners on the light poles across the campus and updated all exterior signage with the newly branded Fredonia name and logo.

Capital Projects, Energy and HVAC

The [Building Automation System \(BAS\)](#) 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 10,000 control and monitoring points throughout the campus.

Controlling the campus' energy usage is the most significant operation of this group. Currently, there are over 10,000 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.



Tim Bentham

Examples of the monitoring include:

- Space temperatures
- Supply air fan speeds
- Fume hood status in Houghton and Jewett Halls
- Outside air temperature (OAT)
- Exterior lighting at:
 - Parking lots
 - Rockefeller Arts Center
 - Symphony Circle
 - Roadways
 - Tennis courts
 - Basketball courts

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
- Air compressors

Significant Accomplishments

- Continued to expand the use of the BAS by installing additional control and monitoring points. Most campus mechanical systems are controlled by the BAS.
- Managed the BAS development for the Science Center and University Village Townhouse projects.
- Added the restroom exhaust fans at Schulz, Hemingway, Nixon, and Chautauqua Halls to the system.
- Managed the upgrade of the Carnahan Jackson Center Variable Air Volume (VAV) controller replacement project.
- Completed an ongoing project of upgrading over 100 field panels for the Carrier BAS.

The HVAC/R group 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.



From left to right: Herb Farner, Steve Carutis, Randy Grant, Gary Hardy and Tim Branden

Significant Accomplishments

- Performed preventative maintenance on all of the heating boilers throughout the campus.
- Provided after hour and weekend coverage to the campus.
- Completed monthly testing of the emergency generators throughout the campus.
- Responded to several work orders regarding heating and cooling issues.
- Performed preventative maintenance on all refrigeration equipment on campus including, refrigeration equipment at all FSA locations, Biology department, water coolers throughout campus and air conditioning equipment across the campus.
- Completed the annual maintenance and startup of the equipment at the Ice Rink at Steele Hall.
- Replaced the main steam traps in Fenton Hall and the radiator traps in Mason Hall as well as adding some steam vents.
- Worked closely with the Building Automation Systems to make systems on campus perform more reliably and efficiently.
- Replaced the #2 compressor at the Ice Rink at Steele Hall.
- Provided temporary air conditioning for summer programs, Resident Director Apartments, and several offices on campus.
- Performed ductwork modifications at Centre Pointe Lounge in the Williams Center and the Cranston Marché in University Commons to provide a cooler, more comfortable working environment for the employees.
- Fabricated and installed air filtration covers for the air intakes at Andrews complex.

- Worked with Facilities Planning and contractors commissioning the equipment in the New Science Center and University Village Townhouses.
- Two employees completed the Aerco Service Technician certification training at a four-day school at the factory in Blauvelt, New York.

Custodial Services

The [Custodial Services](#) unit consists of the Assistant Director, Head Janitor, four Supervising Janitors, 28 Janitors, 54 Cleaners, two SUNY Campus Workers and two seasonal cleaners. Custodial Services is responsible for the routine and construction cleaning of academic/administrative buildings and residence halls, which includes trash removal, collection of recycling, surplus equipment transfers, dusting, mopping, waxing, and polishing terrazzo floors, vacuuming, shampooing of carpets, cleaning of public areas and restrooms, lamp replacement, window washing and much more.

The staff provides snow shoveling at building entrances and ensures the entrances are safe and well maintained. The department also performs minor routine maintenance and repair of items such as blinds and drapes. Most notable, the unit is responsible for commencement setup at Steele Hall each year and also 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.



Mark Delcamp



1st Shift Custodial – Supervisor, Tim Lillie

From left to right, seated: Tim Lillie, Robert Miller, Randy Goodemote, Jose Rosario, Cathy Walters, Sonia Kulian; back row: Natalio Matias, Kevin McCarthy, Robert Degolier, Dave Tarnowski, Sue Valentine, Lee Szalkowski



1st Shift Custodial – Supervisor, Art Franklin

From left to right, seated: Ramona Padua, Julie Echevarria, Linda Saletta, Nancy Pawlak, Kathy Stempkowski, Molly Jelonek, Maryann Wykstra, Melissa Buchanan, Gladys Lockett, Art Franklin; back row: Jeff Deering, John Jackubowicz, Richard Logan, Hector Figueroa, Leonard Coniglio, Nick Valentine, Jorge Rosa, Rick Mackenzie, Jim Michaels



2nd Shift Custodial – Supervisor, Melanie Jacoby

From left to right, seated: Melissa Mt. Pleasant, Phil DeFrancisco, Kitty Pencek, Jack Anderson, Elizabeth Goblirsch; 2nd row seated: Roxanne Logan, Barb Barecca, Iris Rosa; back row: Jeff Jakse, Vic Collura, Charles Miller, Marc Stewart, Joe Andrasik, Melanie Jacoby



3rd Shift Custodial – Supervisor, Darlene Miller

From left to right, seated: Nick Polvino, Tom Schibetta, Andrew Cross, Ken Szymczak, Richard Gugino; back row: Debra Kujawa, Denilson Costa, Steve Kosierb, Susan Lucas, Matt Walters, Sal Lorenzo, Mike Schwertfeger, Brenda Lemanski, Lori Martin, Darlene Miller

Significant Accomplishments

- Custodial Services completed the process to update the Benchmarking Analysis originally performed in 2009. The Benchmarking Analysis provides an attainable standard for performance excellence and helps to maximize the services provided to the campus.
- Successfully relocated the faculty, staff and labs from Jewett and Houghton Halls to the new Science Center.
- Continued to serve as a major contributor to the successful maintenance of Fredonia's facilities, including the pro-active repairs based on daily observations, biannual building inspections, and the Annual Residential Custodial Report (ARCR) conducted immediately after commencement.
- Performed moving services for many departments including inter-office furniture moves for academic and residential areas, and larger furniture moves resulting from construction.
- Provided services for the many specialized athletic and educational camps and programs residing on campus; the groups associated with these programs use academic, athletic and residential areas throughout the year.
- Provided extensive cleaning to buildings that had major construction work occurring during the summer months.
- Replaced window treatments in several areas of the campus.
- Replaced carpet and vinyl floor tile in many offices, classrooms, hallways and student rooms including new carpeting at Kasling Hall, Mason Hall computer labs 2016, 2017, clinic rooms for the Department of Communication Disorders and Sciences and the office of Multi-Cultural Affairs.
- Assisted with the coordination, set up and tear down for many campus events, most notably commencement, scholars breakfast, and the all campus party.
- Worked with Facilities Planning to schedule cleanup efforts for all capital projects such as the Disney Hall Lobby Project, Igoe Hall Window replacement project, Science Center, and the University Village Townhouses.
- Evaluated and purchased many new environmentally friendly equipment items for use in the custodial department.
- Continually evaluated and made the necessary staffing changes to positively support the day to day custodial operations.
- Continued working with Residence Life to ensure their cleaning standards are being met daily.
- In conjunction with the Office of Environmental Health and Safety, continued to provide annual training in Right-to-Know and Blood Borne Pathogens, as well as the annual Custodial Safety training.
- Worked with Residence Life to remove old furniture and install new furniture at several Residence Halls, and to also relocate and repurpose furniture into other Residence Halls.
- Collected and recycled approximately 590 used mattresses from the Residence Halls.
- Coordinated and managed The Waste Wipeout Initiative during move-out at the Residence Halls in May; the totals for items collected included: just over 9,000

lbs. of assorted clothing, 213 lbs. of non-perishable food items and many misc. items such as (TV's, rugs and other small appliances and home furnishings) totaling 2,500 lbs. for a total combined weight of 11,713 lbs. which is an increase of 3,588 lbs. from the previous year. The items are collected for reuse and/or resale by Chautauqua County Rural Ministries in Dunkirk, New York, a nonprofit organization that was developed in the 1950's to meet unmet living needs for the community.

- Worked closely with Property Control and University Services to provide many equipment transfers of various surplus items within the last year.

Facilities Trades Services

The **Electrical** group 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.



From left to right: Thomas Deike, Rodney Hayes, Daniel Riewaldt

Significant Accomplishments

- Completed numerous fire alarm upgrades throughout the campus.
- Managed the annual testing of the campus fire alarm system.
- Upgraded to LED lighting at several locations around campus.
- Upgraded the hallway lighting to LED in Grissom Hall and Kasling Hall.
- Installed fire alarm door holder magnets in Alumni Hall.
- Assisted with the installation of several drinking fountains throughout campus.
- Completed several smart classroom installations throughout campus.
- Installed occupancy sensors throughout campus to control lighting.
- Assisted with the maintenance and inspection of the campus high voltage system.
- Assisted many contractors with electrical needs on campus.

The **Plumbing** group maintains the chemical treatment systems, swimming pool, plumbing fixtures, storm and sanitary drainage systems, supply fan units, water softeners, fire hydrants, backflow preventers, dishwashers 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

- Upgraded drinking fountains at several locations; the new fountains provide chilled, filtered water and include bottle filling stations.
- Completed annual testing for the backflow preventers in many campus buildings.
- Managed the annual fire hydrant testing across the campus.
- Managed the annual testing for the fire sprinkler systems, as well as several repairs and upgrades to the system.
- Managed the semi-annual flushing of sanitary sewer lines at the dining halls.
- Addressed many work orders for plugged drains in the Residence Halls.
- Completed annual preventative maintenance inspections and repairs to the plumbing fixtures in the Residence Halls.
- Exercised campus water main valves throughout campus.
- Replaced one of three hot water tanks in Grissom Hall.
- Replaced the sanitary and storm sewer pumps in the Services Complex.
- Replaced two sanitary manholes outside of Jewett Hall.
- Replaced plumbing fixtures throughout Dods Hall men's locker room.
- Repaired roof drain leader at Eisenhower Hall.



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

The [Grounds and Landscaping Services](#) group is responsible for maintaining 256 acres of land; 24 acres of parking lots with 3,087 parking spaces; over five miles of roadways and over eight miles of sidewalks. The group includes the Head Grounds Supervisor who oversees the entire operation, Supervisor of Grounds, Senior Athletic Groundswoker and seven trades people consisting of Highway Equipment Operators, Groundswokers and several Student Workers during the summer months.



From Left to right: Jim Foringer, Chuck Gatto, Richard Newton, Steve Gromala, Willie Fuentes, Gerald Polvino, Brent Kawski, and John Cole

The staff specializes in 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, and design, plant, and maintain all of the numerous flower beds. The group is also responsible for around the clock emergency control 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 perform set up operations for events such as Alumni Weekend and Fred-Fest, and continually look for ways to enhance the campus' appearance. The grounds crew also maintains several athletic fields, including the University Stadium soccer/lacrosse fields; one practice soccer field, baseball and softball fields, outdoor running track, and the cross-country running course. The maintenance includes layout, lining, irrigation and fertilization of the fields. The crew also cleans up debris and litter, and maintains the numerous waste and recycling stations, keeping the campus looking great.

Significant Accomplishments

- Maintained existing planting areas, and continued to increase the ratio of Perennials vs Annuals planted on campus, in an ongoing effort to be more environmentally, and fiscally sustainable.
- Continued 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 courts, tennis and basketball courts, rugby field and the balance of acreage where campus groups, general students and community alike partake in activities.
- Continued the use of environmentally favorable products such as winter ice melt, weed treatments and fertilizers.
- Introduction of "Horganix" for use on Athletic Fields and highly visible areas on campus, in an effort to introduce a 100% organic fertilizer and reduce the amount of chemicals used on campus turf.

- Continued the plan to phase out many annual flowers on campus and install perennial plantings to increase sustainability and reduce expenses.
- Created a new “No Mow” Zones to assist in reduction of emissions as well as fuel consumption.
- Provided tools, and occasionally assisted or guided various campus groups that were performing service projects, whether an invasive weed pull on campus or assisting the elderly community residents with yard clean up.
- Took on the new responsibilities of maintaining grounds of the Technology Incubator in Dunkirk, the intricate landscaping of the new University Village Townhouses, and the extensive landscape and Living Roof of the new Science Center.
- Selected and decorated pots for several mums, to beautify the buildings on campus.
- Managed to keep the campus roads, parking lots, and sidewalks passable, through one of the harshest winters in local history.
- Provided set up for a growing number of outdoor events, picnics, gardens and community use including FredFest, Alumni Weekend, Athletic Tournaments and the Senior Picnic.
- Completed parking lot, crosswalk, sidewalk and roadway maintenance, improvements, paving and striping throughout the entire campus.
- Installed new street signs and parking lot signage at many locations on campus.

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.



From left to right: Joe Siragusa, Wayne Dorler, Brian Hobbs, James Kuras, Duane Blakely, and Ray Bogue

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.

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. Additionally, campus parking meters are serviced and maintained by the Lock Shop. 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.
- Replaced numerous broken windows in the Residence Halls.
- Developed, maintained and prepared lock systems, keys for numerous Faculty, Staff and Student requests; programed hundreds of 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.
- Power washed the limestone window sills at the exterior of Chautauqua Hall, Nixon Hall and Jewett Hall.
- Installed new flooring in the upper level hallway at Steele Hall and the upper and lower level hallways connecting Dods Hall and Steele Hall.
- Painting the interior CMU walls and doors at the Steele Hall Fieldhouse and upper level hallway.
- Completed concrete sidewalk replacements at several locations on campus and masonry repairs at the loading dock at the Commissary, entrance to the Facilities Services office and at the Andrews and Kirkland Complexes.
- Completed several office renovations and classroom projects including renovations at Jewett Hall for the EC English Program, Maytum first floor for ITS, Reed Library office areas and improvements at the Resident Director apartments.
- Completed several smart classroom improvement projects at Fenton, Mason, Jewett, and Thompson Halls.

- Completed the installation of new interior ADA signage at Hendrix Hall and updated exterior building signs and all banners as a result of the campus rebranding.
- Prepared the keying assignments, installed cores and issued keys for the new Science Center, University Village Townhouses, Disney Hall lobby project and Igoe Hall window project.
- Installed new raised dance flooring at the dance studio in Dods Hall.
- Completed improvements at the Gregory Hall mid-level conference Room and former Guest Rooms.
- Installed wall and floor tile coating system at the public restrooms at the lobbies of Chautauqua and Nixon Halls.

Office Operations

The **Office** is the customer service center for the Facilities Services Department. This unit is staffed with two Calculations Clerk 2 positions. In addition, student workers provide valuable assistance with the day-to-day tasks. 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 and projects and monthly payment of all blanket purchase orders by procurement card.
- Processing key requests for faculty, staff and students.
- Maintaining records for:
 - Work Order System (PM's, building inspections and corrective maintenance)
 - Department budget
 - In-house and minor rehab/repair projects
 - Asbestos Abatement
- Maintaining the department's personnel records for:
 - Change of Status transactions (COS)
 - Training files
 - Performance Evaluations
 - CDL Compliance
 - Asbestos Handling License
 - Accident Reports



Shannon McKoon

- Providing the following weekly and monthly reports:
 - Incubator Work Cost Report to Accounting
 - Incubator Completed Work Order Report
 - Building Access Work Status Reports
 - Janitor Report on Completed Work Orders
 - Residential Work Order Reports

Significant Accomplishments

- Processed purchases with the online Web Procurement System.
- Increased the 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.
- Trained and supervised student assistants in office procedures.
- Maintained the student key database.
- Maintained the database and records for pest control needs.
- Processed 10,547 work orders.
- Processed 158 online requisitions and 53 paper requisitions.
- Assigned, processed and tracked many projects including in-house; Minor Rehab and Repair; Capital Construction Projects; and Residence Hall (DIFR) projects.
- Processed department staff travel arrangements for meetings, trainings and certifications.
- Processed 173 student key requests.
- Reconciled purchases on blanket purchases to local vendors on a monthly basis.
- Processed 335 pest control problems.
- Processed over 1,400 transactions using the Citibank Visa procurement card for a total amount of \$1,007,681 which continues to be an increase from previous years.
- Managed the Marketplace uStore for 23 student key deposits and refunds.

Technical Services

The Facilities [Technical Services](#) unit supports the computing and technology needs for the entire Facilities Services Department by providing staff support, network support, personal computer support, computer upgrades, software updates and installations, and the planning and ongoing review of the systems in place. Support is provided for the department's two-way radio system, department webpage, academic and the administrative card access control, and CCTV network. This unit also serves as the Physical Space Inventory Coordinator which includes maintaining the physical space inventory (PSI) information database as required by SUNY System Administration. The campus PSI drawings are updated and maintained by this unit. The Computerized Maintenance Management Software (CMMS) Maintimizer work order system is also managed by Facilities Technical Services.



Mike Jackino

Significant Accomplishments

- Processed PSI update sheets sent to the State University Construction Fund (SUCF) System Administration using new web form.
- Created the BCI and PSI information for various renovation projects.
- Maintained the Facilities Service portable two-way radio inventory.
- Completed several upgrades to the department computers as per campus requirements.
- Collected the data for the 2014 Annual Residential Custodial Report (ARCR) for the Residence Halls, which included 1,956 scanned repair codes generating 21 work orders.
- Upgraded the work order system to web version 4.0. This was a significant project that addressed customer needs by allowing the person submitting a work request to receive notifications and the option to view the status of their request on a web page.
- Created a web report for viewing live data of the status of all work requests, sortable by building.
- Completed the Installation of Card Access and security cameras at the Science Center and University Village; this included 160 card readers and 18 cameras.
- Completed the Thompson Hall project providing card access to computer labs W207 and W217.
- Upgraded card readers to iClass format at Reed Library and McEwen Hall.
- Managed the operation of CCTV cameras across the campus.
- Processed requests for access cards granting building access to contractors and consultants.
- Installed card access on all exterior doors at LoGrasso Hall.
- Installed card access and video cameras at the South ADA entrance of Fenton Hall.
- Processed and managed the card access reservations for the guest room in LoGrasso Hall.

- Installed card access on three exterior doors at Rockefeller Arts Center to allow for student after hour access.

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 request for qualifications (RFQ) for consultant design services have been completed for many new projects.

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 2013-2014	No. Closed 2012-2013	No. Closed 2011-2012	No. Closed 2010-2011	No. Closed 2009-2010	No. Closed 2008-2009	No. Closed 2007-2008	No. Closed 2006-2007	No. Closed 2005-2006
Structural	1,868	2,074	2,035	2,337	2,648	2,539	2,774	2,653	2,567
Electrical	1,631	1,845	1,685	1,852	1,232	1,353	1,387	1,305	1,273
HVAC/R	1,403	1,310	819	823	532	457	484	584	547
EMS	33	8	6	2	1	6	2	10	20
Lock Shop	1,381	1,595	1,385	1,430	1,355	1,414	1,379	1,321	1,301
Plumbing	1,267	1,606	1,445	1,615	1,529	1,817	1,743	1,801	1,797
Grounds and Landscaping	200	297	342	185	182	266	365	199	257
Asbestos	55	44	56	81	108	109	172	163	196
Custodial	786	487	715	758	644	795	803	990	761
Total:	8,624	9,266	8,488	9,083	8,531	8,756	9,109	9,026	8,719

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.
- Surveys were sent over a six year period to the originators of the Trouble Call Category work orders. Responses were isolated between academic and residential areas. The information gleaned from the results was reviewed and used to enhance the services provided by the department. The following information has been gleaned from the survey responses:
 - Response time to work request was acceptable
 - Service staff was introducing themselves
 - Service representatives were explaining process
 - The work was completed promptly once started
 - The work is being completed in a professional manner
- Overwhelmingly, 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. These comments are expressed at the All Campus Meeting and throughout the year by the campus.
- In the fall of 2013, the Facilities Services Department conducted a Customer Service Survey by third party vendor, *Sightlines*; the survey was sent via email to the campus news listserv which includes over 10,000 people; the scope of services is included below along with key information gleaned from the vendor.

Customer Service Evaluation

At colleges and universities, facilities departments are ultimately customer service organizations. Therefore, it's critical to include the customer's perspective in any service review. Sightlines assesses service at all campuses in three ways: service process reviews, representative inspections of campus space, and customer surveys.

Sightlines' assessment of customer service begins with a review of the operating processes for the collection and scheduling of work. From the collection of work orders to service completion, these processes and interactions with the department often shape the customer's view of the facilities organization. The process review assesses the following:

- Effectiveness of the service request process;
- Management and scheduling of requests for service: what is to be done, when it is to be completed, who it is assigned to, and how the activity is completed;
- Organizational structure and reporting relationships within the facilities department;
- Effectiveness of systems that catalogue work orders, provide performance measurement, and track the backlog of work.

An inspection of campus buildings and other facilities is performed to assess general conditions and daily service levels. Sightlines inspects a representative sample of buildings – typically spaces representing between 25% and 40% of the total square footage. The following aspects of campus appearance are assessed using Sightlines' standardized service ratings:

- Cleanliness of common areas, hallways, bathrooms, etc.;
- General building repair;
- Cleanliness of mechanical spaces and systems;
- Building exterior repair;
- Grounds condition.

Sightlines surveys facilities service customers. Institutions select key users through Sightlines' double-blind, web-based tool. Generally, the user group is between forty and one hundred individuals at each campus.

Since this process can be replicated easily, we can measure customer opinion during the initial Sightlines start-up as well as during each annual update. This enables you to gauge the effectiveness of changes to your department over time.

Customer Satisfaction Survey results

Background and scoring process

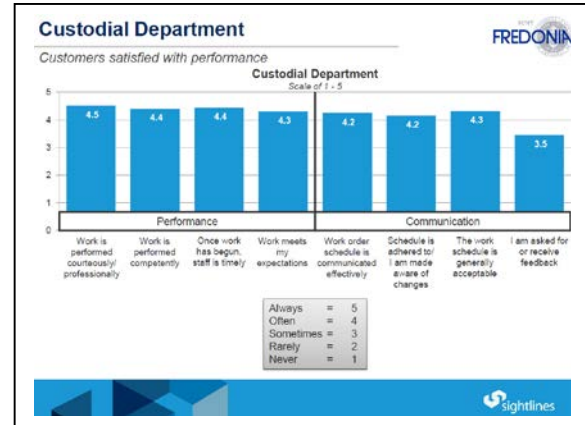
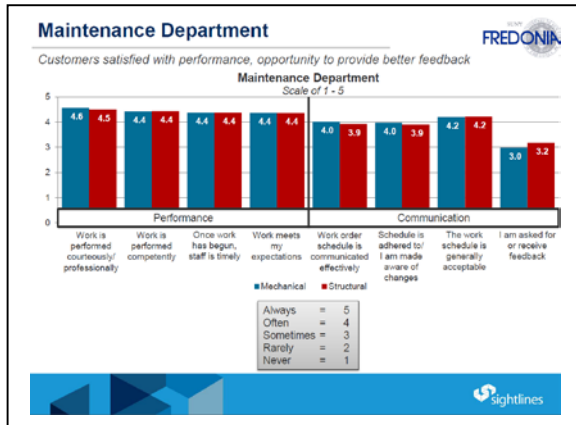
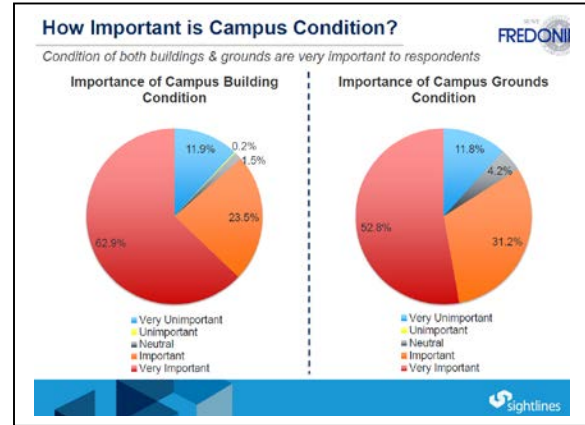
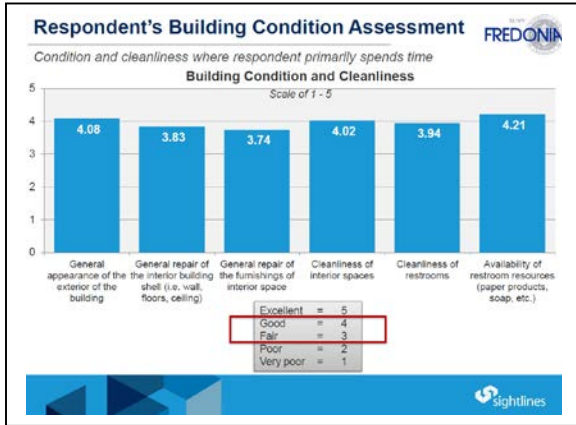
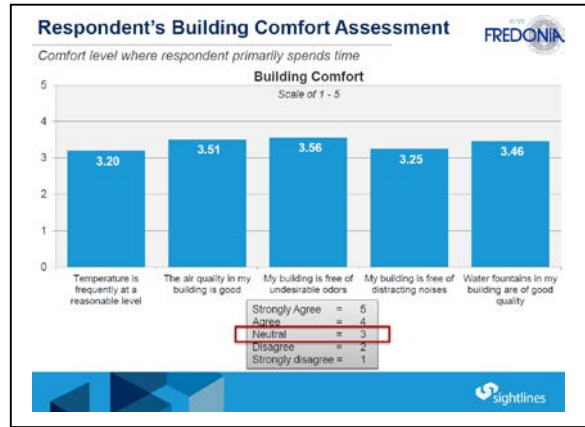
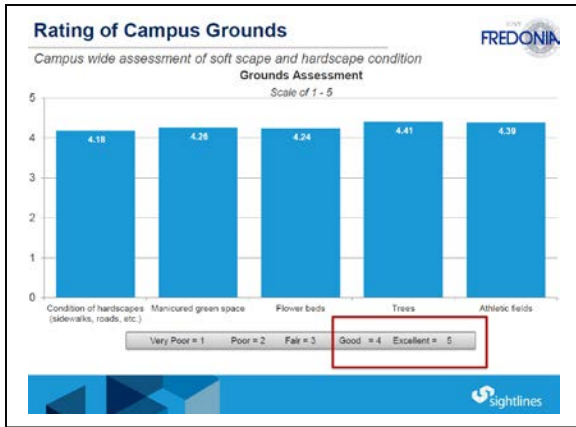
Total surveys viewed:	713
Total surveys started:	577
Total surveys completed:	477
Completion rate:	82%

Key observations

Overall response from survey participants indicates customers have high expectations. The majority of customers feel their expectations are being met or exceeded.

Communication with customers plays a key role in overall satisfaction. Survey results again indicate that customers desire more communication; improving communication regarding customer feedback will increase overall satisfaction scores.

Work order data has identified buildings with high work order counts. Utilize this data to determine if capital projects would alleviate strain on reactive maintenance repairs by staff.



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.
- 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 10-year agreement between the FSA and the State University of New York at Fredonia was amended to include an extension for an additional period through June 30, 2018. 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. The 10-year agreement satisfies requirements for a contract between FSA and Fredonia that corresponds with the term of financing for FSA funded construction projects.

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 decreasing support for Fredonia from the State of New York. 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.

The Executive Office staff consists of five full-time management employees, four full-time CSEA employees, and two part-time CSEA employees.



From left to right, front row: Katie Thies, Terri Helwig, Courtney Remington, Mary Zielinski, and Lucas Catalano; back row: Moriah Keddle, Darin Schulz, Sarah D'Amaro, Matt Snyder, and Michelle Kowalski

Significant Accomplishments

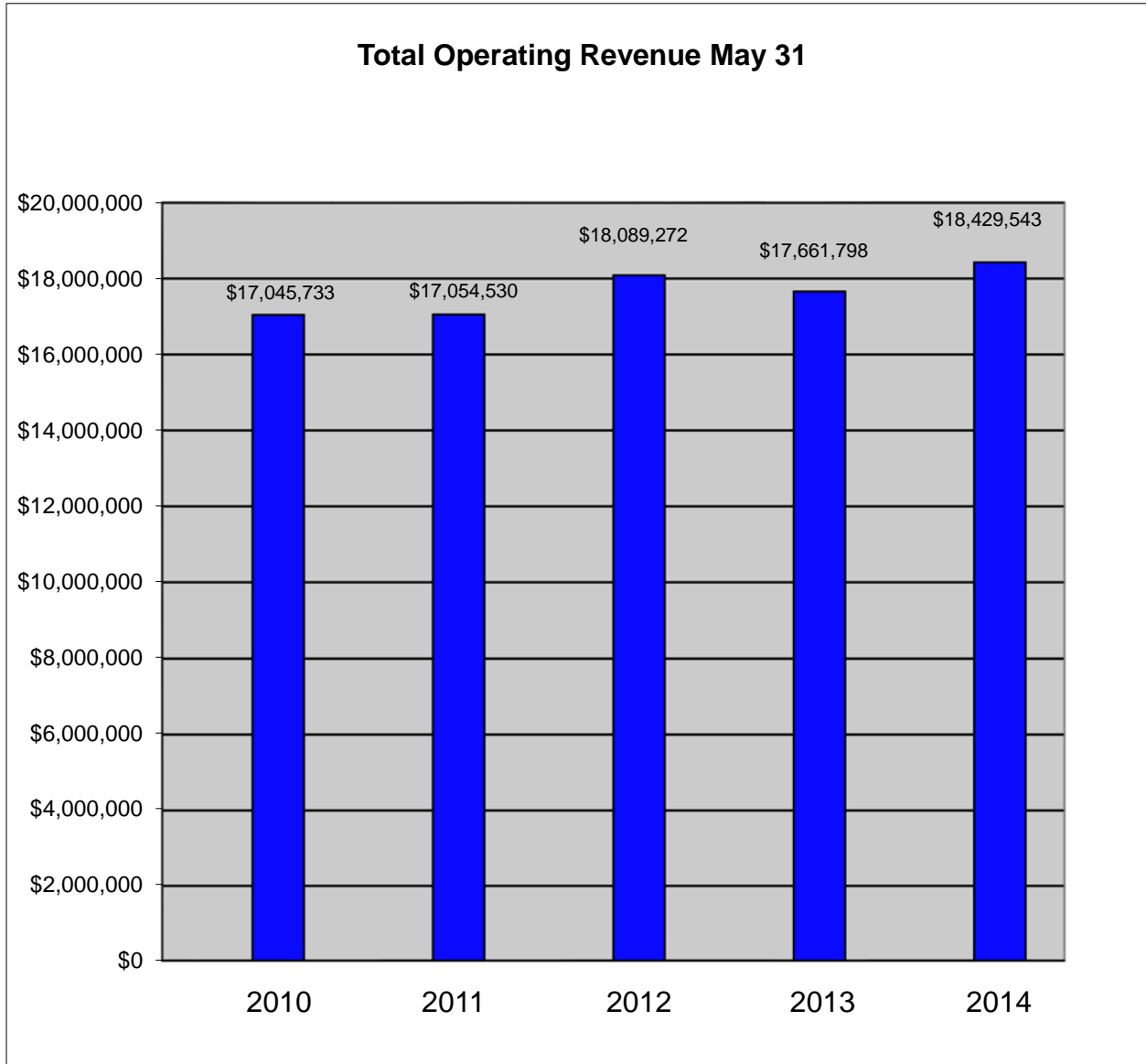
- Budgeted the same level of support to the Campus at \$1,183,525.
- Budgeted the same level of FSA Board Program allocations at \$681,525.
- Budgeted the same level of Space and Utility charge support at \$500,000 which includes a \$350,000 special assessment for SUNY budget reductions.
- Renovated the Centre Pointe food court to improve variety and increase sales.
- Managed downsized operations and turned around financial results after three consecutive years of losses (with decreased enrollment) by instituting several cost cutting measures, improved clothing sales, and modification to the university meal plan policy for first semester freshmen.
- Developed the 2014-2015 operating budget based on \$18,606,370 in revenue and will return net revenue under expenditures of \$66,433 or -.6%.

Statistical Data

- Revenue from operations totaled \$18,429,543 representing a 4.3% increase from the previous year.
- Operating expenses totaled \$10,306,646 which is a 2.3% decrease from the previous year.
- Program expenditures, serving 50 campus groups and organizations, totaled \$677,748.
- While providing the high level of support, net results from operating and non-operating activities yielded an increase in Net Assets of \$683,840.

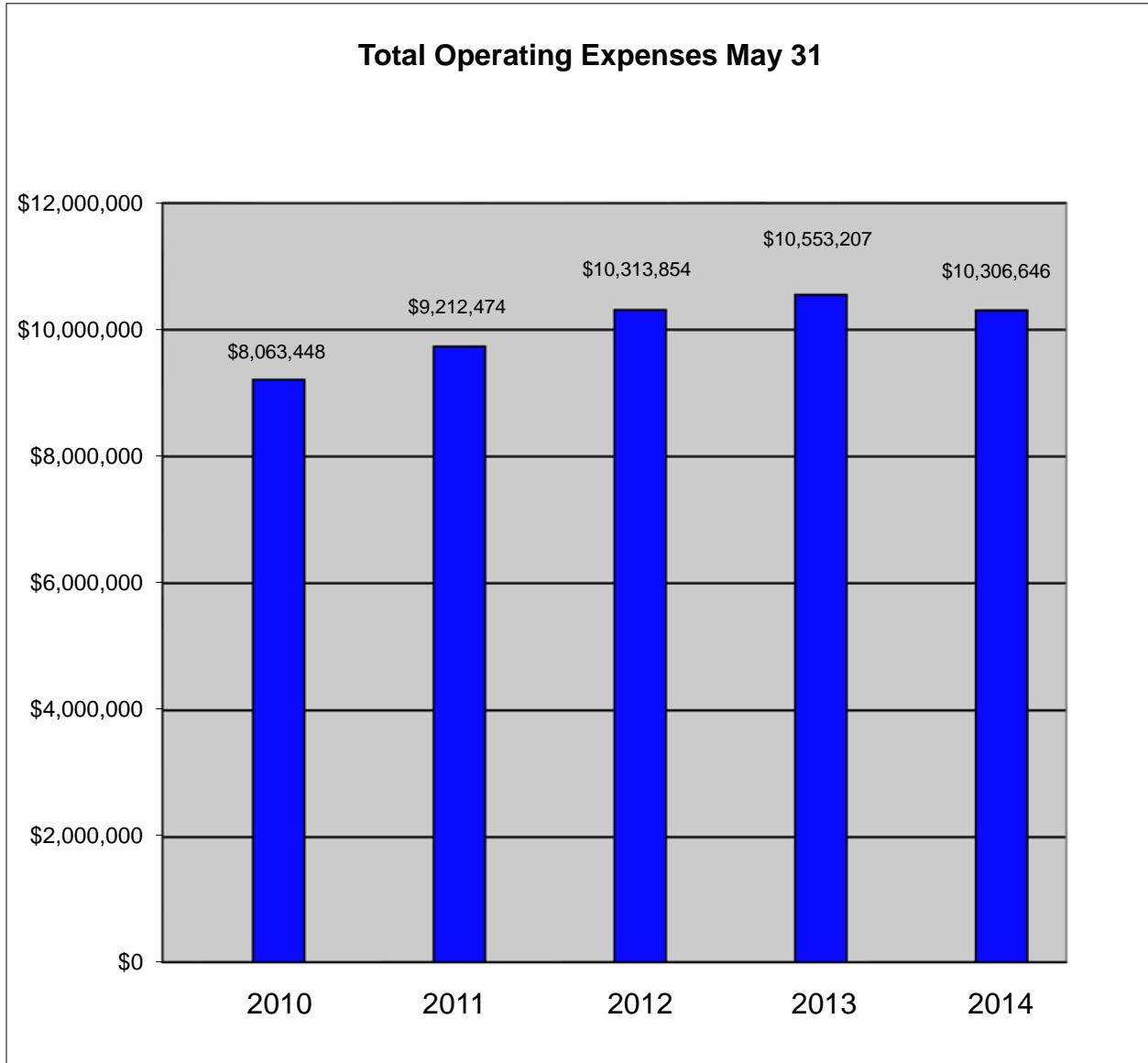
FACULTY STUDENT ASSOCIATION OF THE STATE UNIVERSITY OF NEW YORK
AT FREDONIA

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



FACULTY STUDENT ASSOCIATION OF THE STATE UNIVERSITY OF NEW YORK
AT FREDONIA

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 and the auditor's internal control recommendations were implemented where appropriate. 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

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.
- Improve operational efficiency by analyzing labor utilization in services provided.

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, Satellite Convenience Store and a Starbucks Coffee that enables us to meet the requirements of Fredonia's dynamic residential population. The facility is designed to be a flexible retail outlet that can adapt to Fredonia's needs.



From left to right, front row: Nicolette Lamb, Tina Reilly, Jessica Saletta, Sharon Hogg, Marge Wheeler, Kim Fancher; back row: Dot Russo, Chris Zenns, Yvonne Wright, Peggy Hillman, Dawn Hill, Jeff McMinn, and Laura Lynden

The Bookstore's greatest challenges are with the textbook pre-pack program, as well as the emerging online textbook orders. This is the tenth year the Bookstore has offered residence hall survival kits. The kit is customized each year to include several of the most popular items requested when students move into a new residence hall.

The Bookstore operates a full service Starbucks Coffee 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 oversees vending machine operations throughout campus that are sub-contracted to The Cuyahoga Group. Retail Operations handles a majority of the service calls and other customer service issues with vending.

The Bookstore, Convenience Store, and Starbucks Coffee staff currently consists of six full-time management employees, six full-time CSEA employees, 14 part-time CSEA employees, and seven part-time student employees.

Significant Accomplishments

- Enhanced textbook rental program.
- 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.
- Revised the product mix of the Dorm Survival Kit.
- 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.
- To allow students to shop and compare textbook prices, Verba Software was implemented to the www.fredoniabookstore.com website in order to reduce loss of market share.
- Increased product mix from local vendors.



FREExpress

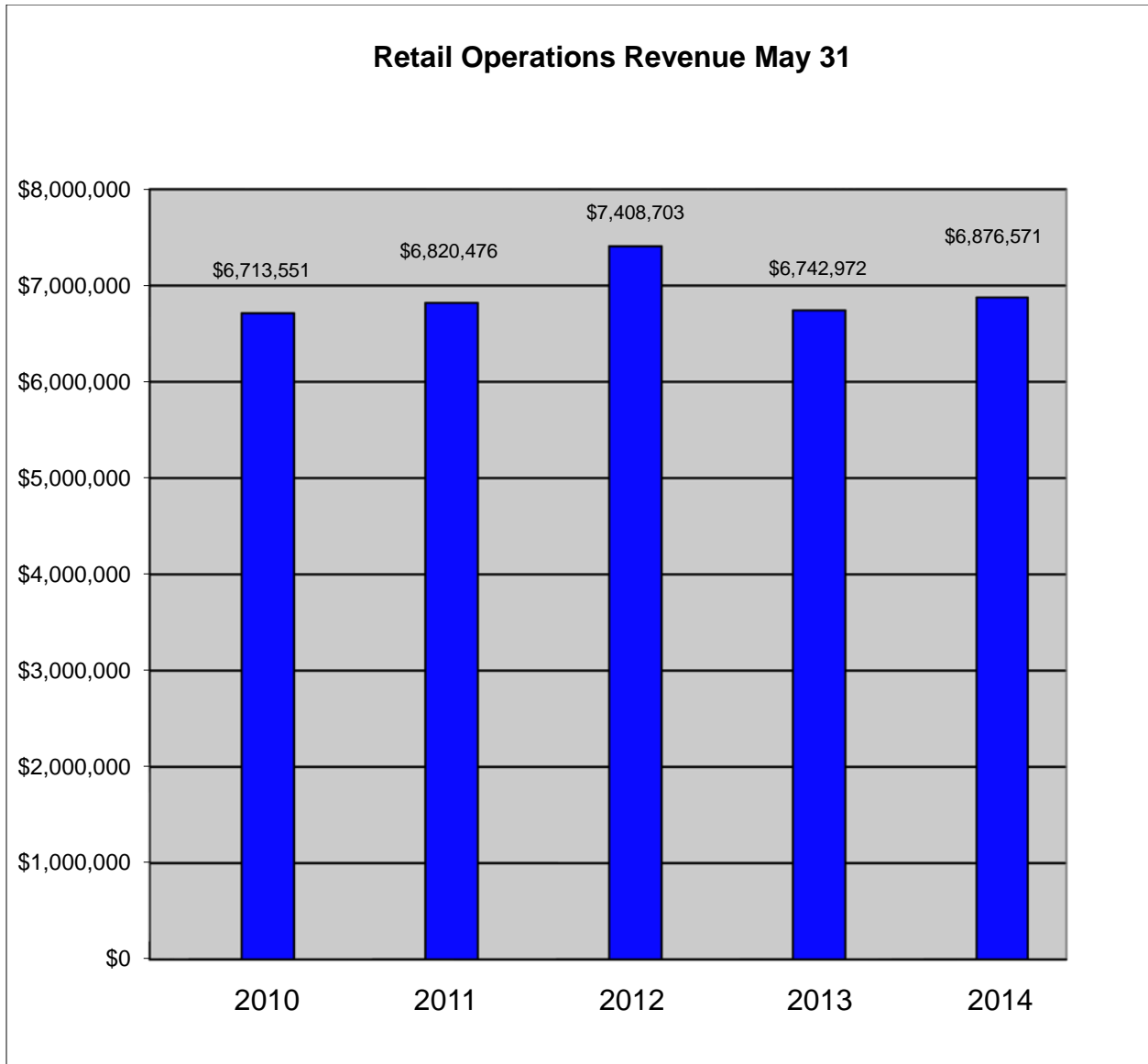
*From left to right: Lindsey Lobb and
Tricia DeJoe*

Statistical Data

- Revenues for the 2013-2014 fiscal year were \$6,876,571 compared to \$6,742,972 in 2012-2013, an increase of 2.0%.
- Debit Accounts decreased by 122 participants to 1,764 in fall 2013, from 1,886 in fall 2012.
- Fall of 2013 Textbook Pre-packs totaled 793; an increase of 18.9%.
- Net Revenues increased 12.3%.
- Operating expenses increased only \$546, or 0%.

FACULTY STUDENT ASSOCIATION OF THE STATE UNIVERSITY OF NEW YORK
AT FREDONIA

The following chart represents total FSA operating revenue by year for each of the past five years which includes Convenience Store, FREDExpress, Starbucks, and the University Bookstore:



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 varied amount 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 textbook and 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, 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 revise as needed in order to increase annual retention rates.
- Maintain 100% compliance with the college-licensing program.
- Maintain compliance with 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 develop a campus wide marketing program.
- Enhance Starbucks lunch program with increased menu items following Starbucks mandated ingredient guidelines.

- 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.
- Refine product mix for the FredExpress convenience store in Thompson Hall.
- Look for new and interesting social media marketing opportunities.
- Implement faculty relations program to increase textbook adoption rates.
- Explore and increase product mix from local vendors.
- Enhance e-commerce by having the www.fredoniabookstore.com site include textbook rentals, and accept the Fredonia debit plan, FredFunds and Fredonia gift cards as tender methods.

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 full-time management employees, full-time CSEA employees, part-time CSEA employees, and part-time student employees.



Cranston Marché

From left to right, front row: Brenda Butler, Lisa Lampert, Sue Maggio, Pat Wilde; back row: Darlene Thomas, Carol Dloniak, Nancy Rowland, Michelle Abate, and Felicia Nowak



Centre Pointe & El Diablo Azul

From left to right, front row: Cheryl McCoy, Darlene Brinkman, Leslie DeWolf, Sandi Buckley, Danielle Gee, and Taylor Walker; back row: Dean Messina, Diane Mekus, Allison Kozlowski, Cindy Holcomb, Cindy Korzeniewski, Lisa Williams, and Ed Koning



Tim Hortons

From left to right, front row: Shanessa Escobar, Lei Gao, Kaitlin Mu, Danielle DePastino; back row: Aaron Manigault, Garrison Koehler, Will Sulkowski, Heike Magdowski-Hawker, Michelle Congdon, and Arynne Bednasz



Café McEwen

From left to right: Sean Edelman, Elizabeth Jurczak, Angelina Storelli, and Elijah Rhodes



Café Mason

From left to right: Pamela Kus and Lynette Neallard



Café Fenton

Sarah Ciesielski



Catering Office

From left to right, seated: Dean Messina, and Linda Kurgan Monaco; back row: Mike Proffer, Jeff Walter, and Mark Kinney

Significant Accomplishments

- Implementing cost cutting initiatives and operational efficiencies created major fiscal turn around resulting in significant profit extraction.
- Increased customer service levels in Tim Hortons through staff training and adjusted to high volumes with the Express Line.
- Expanded Café menus to help increase sales.
- Opened El Diablo Azul, a Mexican concept station serving rice bowls, burritos, tacos and nachos with daily offerings of fresh cooked meats, beans and vegetables along with fresh salsas made in our commissary.
- Refined stations in Centre Pointe and added in new stations including a self-service fresh salad bar, home-style station, Asian concept station and a made-to-order stir fry station.
- Featured Holiday Dinners and Special Theme Days in Cranston Marché, including a week of International Meals to celebrate the campus' International Education Week and an event for Relay for Life, entitled "Paint Cranston Purple".
- Focused on staffing efficiencies for catering production and execution, resulting in major fiscal turnaround.
- Continued internal web-based sanitation training, complimented by hands on instruction.
- Increased our local purchasing to 17.4% of total items, surpassing our established goal of a 1% annual increase.

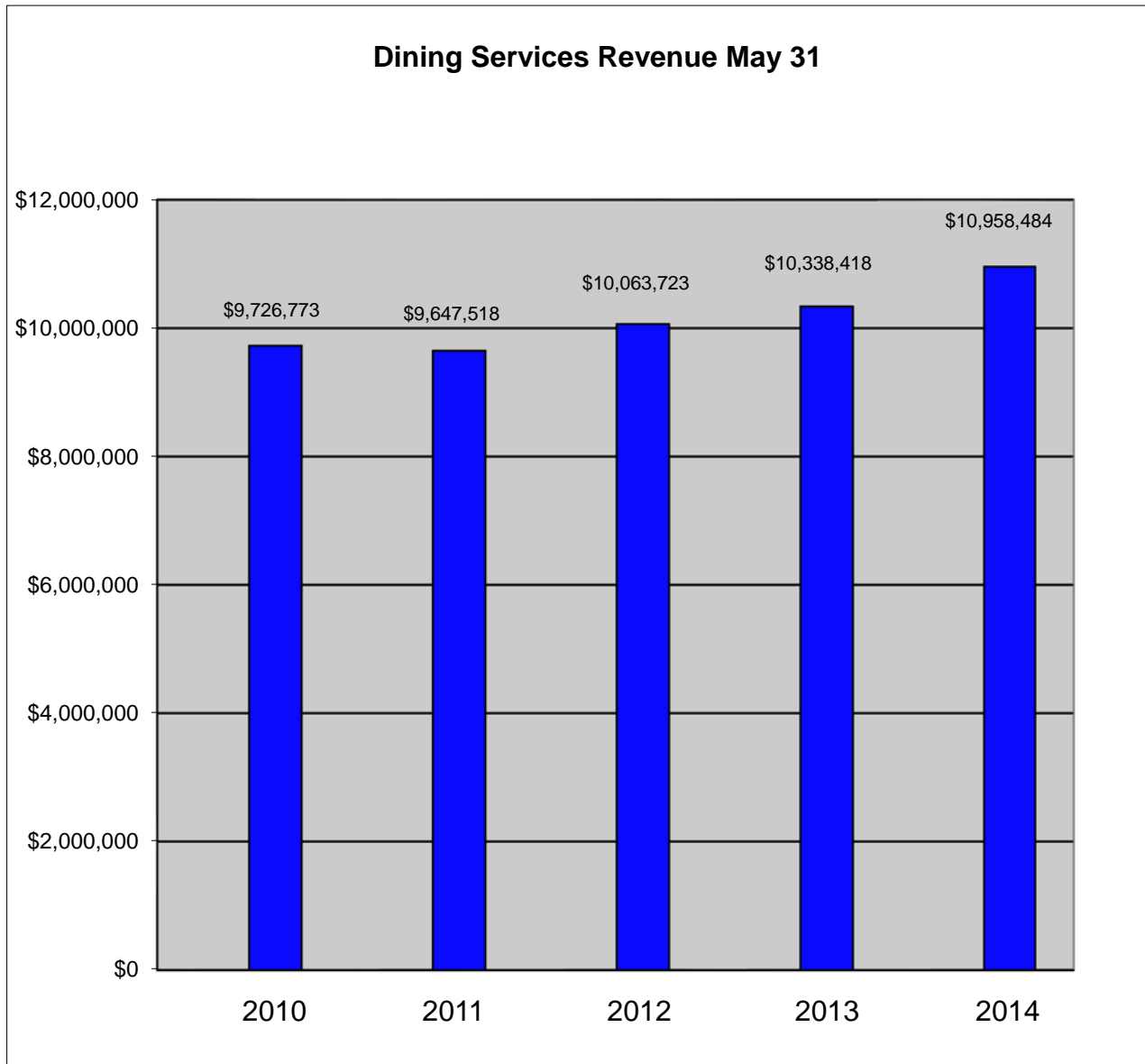
- In conjunction with our primary vendor Maplevale Farms, we evaluated and selected new products to increase quality and cost of goods efficiency.
- Proactively engaged food brokers, most of whom underwent major consolidations, to increase quality and cost of goods reduction.
- Provided personalized attention for the increasing number of students with dietary preferences and medical dining restrictions.
- Cross trained management staff in other units for increased efficiency.
- Developed operational plan for a new Café in the Science Center.
- Explored alternative revenue and service streams including EC English and meals for International students during break periods.

Statistical Data

- Self-operated Dining Services revenue for the 2013-2014 fiscal year was \$10,958,484 compared to \$10,338,418 in 2012-2013, an increase of 6.0%.
- Meal plan enrollment decreased by 90 participants to 3,521 in fall 2013, from 3,611 in fall 2012; a 2.5% decrease for the fall 2013 semester.
- Net Revenues increased 7.5%.
- Operating expenses decreased \$215,436 or 3.4%.

FACULTY STUDENT ASSOCIATION OF THE STATE UNIVERSITY OF NEW YORK
AT FREDONIA

The following chart represents total FSA Dining Services operating revenue by year for each of the past five years, which includes Catering, Centre Pointe, Cranston Marché, FSA Cafés & Concessions, MarketPlace at Erie, and Trendz:



Assessment Update

Assessment Statement

Ongoing customer preference for more Points based dining, and grab and go selections. Heightened focus on Cafés, Tim Hortons, Centre Pointe and El Diablo Azul.

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 e-mails 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

Maintain current positive fiscal trend through operational efficiencies, in the face of declining enrollment.

Work with the FSA Board and Food Service Committee to refine operations and springboard new initiatives and operations, including the new Science Center Café.

Explore methods to improve customer service in Tim Hortons, Cafés, and Centre Pointe.

Assess possibility of expanding Made to Order features in Cranston Marché.

The Sustainability Committee membership provided insight into the bottled water issue and local purchasing initiatives.

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.

- Launch new Science Center Café, evaluate unique menu selections, and adjust to operational changes impacting other Cafes. Creatively meet challenge of increased volume in Tim Hortons and Cafes through staff training and necessary infrastructure enhancements.
- Continue to fine tune Café menus for freshness and popularity.
- Evaluate stations in Centre Pointe, revamping less popular options and adding new menu choices.
- Maintain menu integrity and portion control in El Diablo Azul to accurately reflect retail counterparts.
- Add special features to Cranston Marché to maintain customer base, such as International menus every Tuesday.
- Maintain current positive catering operations through efficient operations and adding more outside catering to increase revenue.
- Plan short and long-term operational response to the anticipated enrollment decline trend and increased popularity of points.
- Market all units to increase customer awareness via various media.
- Consider alternative management organizational model.
- Develop Operations Manuals for all units.
- Develop training program for all management staff, regular employees, and students.
- Evaluate menu items, recipes, and product specs to effectively control anticipated significant increases in cost of goods.
- Implement the Dining Services Sustainability Program which includes pre-consumer and post-consumer waste reduction programs, and increased local purchases.
- Continue prompt and thorough responses to comment cards and e-mails.
- Develop more sophisticated food and labor cost monitoring and control tools.

Human Resources

Annual Report

The Human Resources (HR) staff currently consists of two full-time management employees. 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. Also performs payroll functions and administers pension, health insurance, and dental plans for Management, CSEA and Student employees.

The FSA Corporation consists of 80 full-time management and CSEA employees, 103 part-time CSEA employees, and 275 student employees.

Significant Accomplishments

- Coordinated Annual Employee Orientation meeting.
- Trained all employees on the “Right-to-Know” law, fire extinguisher use, and workplace safety.
- Maintained Wage Theft Prevention Act Compliance.
- Provided online Workplace Safety training to all management employees.
- Maintained “Lose 10” Wellness Program with quarterly weigh-ins.
- Held Annual Student Recognition Banquet.
- Recognized Employee of the Semester and Years of Service.
- Completed orientation for all new CSEA and management employees.
- Provided a cost savings on health insurance by implementing a higher deductible plan.
- Conducted safety audits in each work location.
- Provided monthly safety, wellness, and management training material.
- Followed 23 grievance procedures.
- Successful implementation of new Payroll Software, Paylocity, resulting in significant savings in payroll processing.
- Provided information on Smoking Cessation to all employees.
- Attend SHRM Conference.

Statistical Data

- 152 FSA employees attended Annual Orientation Meeting.
- Hired eight 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

- To help ensure fiscal compliance, continuation of the biweekly report of budget vs. actual hours worked.
- Meet regularly with management staff to review employee policies and procedures outlined in employment handbooks and 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 into the Material Safety Data book.
- Prepare review of monthly unemployment experience rating to ensure compliance.
- Assure Department of Labor Compliance by posting Wage Theft Prevention Act information.
- 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.

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.
- Continue to investigate implementing Wellness and Smoking Cessation programs.
- Meet with each employee annually to increase employee awareness of individual benefits including, retirement, SRA, health insurances and EAP programs.
- Conduct annual employee evaluations for CSEA and Management employees.
- 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-CREF representative to provide 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.
- Brainstorm ideas to build morale.
- Implement employee recognition programs.

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 three full-time management employees.

Significant Accomplishments

- Developed and successfully implemented a new digital menu board system for Centre Pointe and El Diablo Azul.
- Launched new College Lodge website and moved to locally hosted FSA servers.
- Relocated Cable TV head end and installed a new all-digital Cable TV system.

Statistical Data

- 5,172 add-on online deposits totaling \$390,510.41 through the MyFREDCard.com site.
- 1,534 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 develop and implement new mobile apps and technologies that will directly benefit customer interaction with FSA.

- Expand use of new digital menu board system to all café locations.
- Provide POS and technical needs for new Science Center café.
- Develop FSA mobile apps.
- Develop online ordering system.
- Streamline processes and information where needed/requested.
- Enhance resiliency/redundancy for mission critical systems.

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 and 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.

Significant Accomplishments

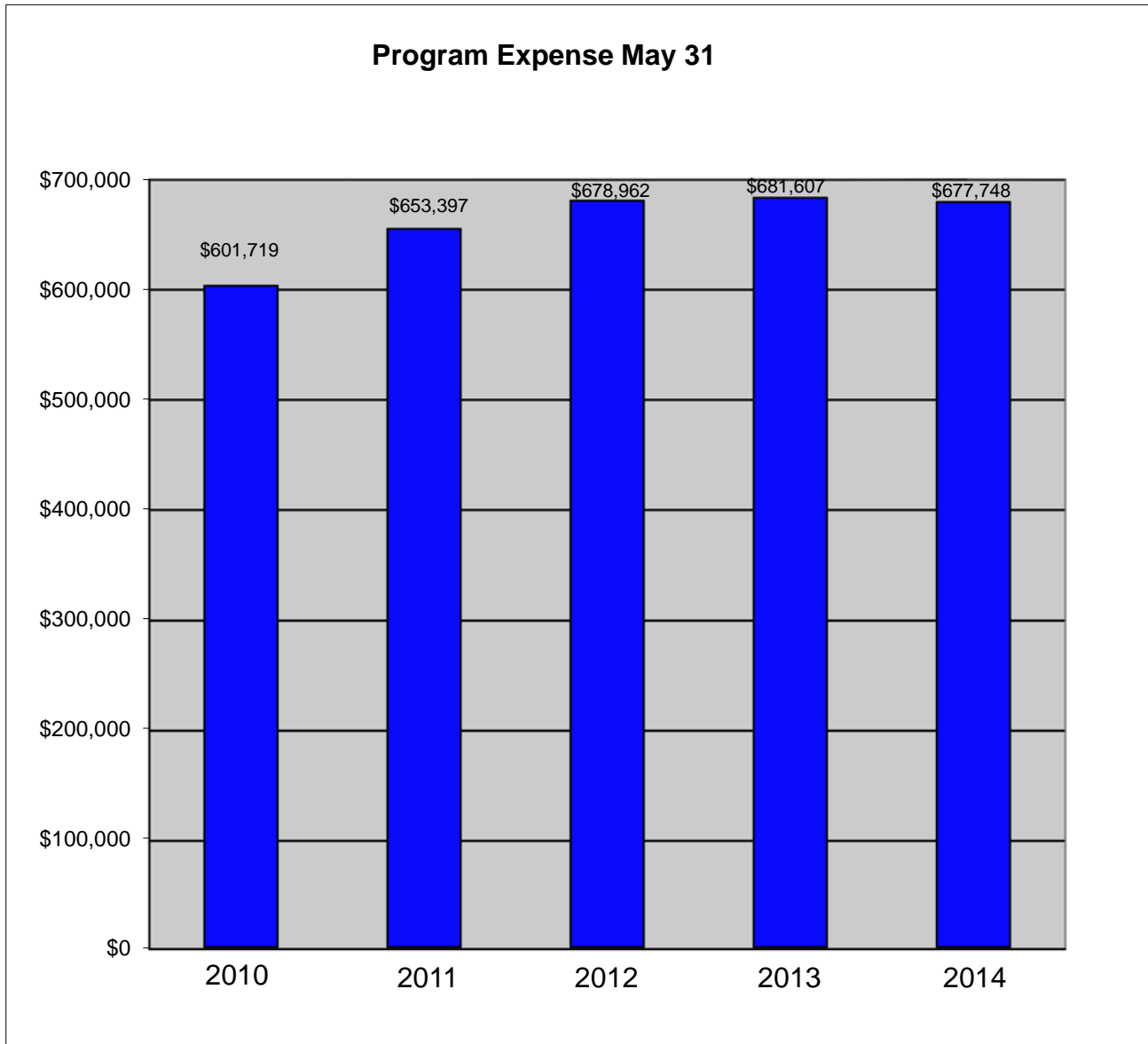
- Coordinated the planning and implementation of all marketing for the 2013-2014 Academic year, which included special events in both Dining Services and Retail Operations.
- Continued to expand social media marketing efforts.
- Presented the Administrative Services Orientation DVD at the 2013 New Student Summer Orientation sessions.
- Coordinated all 2013 summer conferences, which included: The Quartet Program, two NYSSSA (New York State Summer School for the Arts) programs, the School of Choral Studies, the School of Visual Arts, the Rotary Youth Leadership Academy (RYLA) , and both the EDP and Upward Bound Summer Programs.
- Continued involvement as emeritus of Chautauqua Leadership Network (CLN).
- Successfully hosted six weddings/receptions at the College Lodge from June 2013 to May 2014.

Statistical Data

- 15 residential summer programs on campus.
- 12 summer day programs on campus.
- Eight residential summer experiential training programs at the College Lodge.
- Three summer day experiential training programs at the College Lodge.
- 99 licensed vendors.

FACULTY STUDENT ASSOCIATION OF THE STATE OF NEW YORK
AT FREDONIA

The following chart represents total FSA Programs supporting over 40 activities annually
On campus by year for each of the past five years:



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.

Assessment Activities

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

Regular monitoring of licensing procedures has helped to promote the production and sale of Fredonia merchandise, both on and off campus. The 2013-2014 fiscal year represented another good year for Fredonia's royalties.

Encouraged open communication with all faculty and staff via the Special Events Committee to ensure that our campus guests attending a variety of summer conferences had an enjoyable stay, and their programs were successful. We continue to meet and exceed expectations as a campus.

Assessment Goals

- Continue to market all FSA operations.
- Continue to promote the College Lodge as a wedding venue, for the Experiential Training Program, and the property as a whole through expanded efforts with the Chautauqua County Visitors Bureau (CCVB).
- 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 seminars, sessions and workshops at the regional meeting and the annual conference.
- Continue to foster relationships with faculty and staff via the Special Events Committee and other campus constituents to ensure successful campus experience for our conference groups.
- Continue to monitor, provide for training, and approve the numerous needs of Trademarks and Licensing by licensed and non-licensed vendors, 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 meetings held once a semester and via e-mail.
- 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 for them at Fredonia.
- Remain an active member of the Chautauqua Leadership Network (CLN) by serving as a committee member, assisting as a facilitator at the retreat weekend, and 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. Starbucks Coffee and FRED-Express increased the food production in Central Prep with new menu items and higher demand.

The Support Services group continued with five full-time management employees, full-time CSEA employees, part-time CSEA employees and student employees.



Front row: Fred Tripp; from left to right, 1st row: Amanda Reading, Linda Willoughby, Dennis Kaiser, David Lewis, Robin Killion, and Bob Watson; 2nd row: Kimberly Collins, Craig Moore, Julie DePasquale, Toni Bausum, Ron Wasik, and Jeff Keddie; 3rd row: Tracey Simmons, Josh Roman, Chris Sipp, Jared Farnham, and Gary Wise

Significant Accomplishments

- Completed more than 580 work orders.
- Cleaned and maintained all FSA operated facilities.
- Provided Experiential Training for 573 participants in 2013-2014, which reflected an increase of over 14% from the previous year. Clarence Central School returned in November 2013 after being unable to book in 2012, and Leadership Buffalo participated

in training. As part of our training services we participated in the Fredonia Clerical Conference and the Provost Retreat.

- Continued to expand operations of Central Prep by adding new items with Starbucks, FREDExpress, and the Convenience Store.
- Re-routed and combined deliveries for better utilization of equipment and cost savings.
- Started preparing fresh salsas on a daily basis for the Mexican concept grill, El Diablo Azul.
- Developed new recipes including corn bread, focaccia, mini weck and plain rolls, garlic bread and Italian bread for Cranston Marché.
- The Lodge hosted a successful Earth Day with over 150 people in attendance and a Bioblitz was planned.

Statistical Data

- Revenues from Support Services for 2013-2014 totaled \$594,488 compared to \$580,408 in 2012-2013, which is an increase of 2.4%.
- Operating expenses increased 2.2%.

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 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 FSA's Experiential Training Program at the College Lodge.
- 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.
- Plan for the additional support and logistics for the new Science Center Café.

- Assist in the renovation of our buildings and equipment to meet the changing demands of our customers.
- Expand additional fresh baked items into the Convenience Store and FredExpress.

Human Resources

HUMAN RESOURCES

Introduction

As a staff function, no departments report directly to Human Resources (HR). Yet, based on the multiple functions performed, Human Resources has ongoing and detailed interactions with, and provides guidance and advice to all campus employees. Whether supporting recruitment efforts, communicating benefit-related information, updating the HR information system, vetting grievances (and conducting related due diligence activities), managing a Workers' Compensation case, interpreting contract or policy language, or advising Management on a course of action, Human Resources' work impacts all employees at Fredonia.



From left to right, seated: Jen Costa, Mike Daley, and Stephanie McMasters; back row: Leah Betts, Diane Howard, Laurie Ensign and Jodi Rzepka

Mission Statement

The core mission of HR is closely aligned with the university's vision. The HR department seeks to support Fredonia's efforts to produce students who are "Skilled, Connected, Creative and Responsible." Human Resources seeks to attract and retain the best-qualified applicants by constantly promoting Fredonia as a "Great Place to Work." Specifically, HRs' Mission Statement is:

"As a strategic partner with University Leadership, Human Resources is committed to providing exceptional and evolving, innovative service in the recruitment, retention and continuous development of a diverse workforce. Our efforts are directed by common values of trust, respect, and promotion of a positive work environment designed to support excellence in teaching, scholarship, research and administration."

Once that best-qualified individual is identified, it is important that HR as an initial and primary campus contact, facilitates the employee's seamless transition to campus. To that end, the orientation programs commence the newly hired employee's "on-boarding." Through the orientation process, HR endeavors to provide relevant information to staff, thus allowing them to focus on instruction, student support services, administrative activities and the performance of their duties thereby supporting the larger mission of the campus namely "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."

HR is committed to a continuous review of its activities to ensure they promote efficiencies and best practices. HR strives to partner with Senior Management to provide advice, proactively and creatively solve unique, often non-recurring problems, and promote service excellence and champion positive and productive employee relations on campus. HR also works to ensure that all activities are performed in compliance with governing Federal, State and SUNY statutes, thus insulating the University from external liability.

Annual Report

HR is responsible for the following functions: position classification and compensation; compliance training, Faculty, M/C, Professional and Classified recruitment and employment - including tasks related to advertising positions externally and on the HR web; benefits administration and consultations regarding three health insurance plans; three retirement programs; three vision and dental plans and numerous other employee benefits (e.g.: tuition reimbursement, flex-spending accounts, disability insurance, life insurance, etc.); new faculty and staff orientation; employee relations including contract administration, grievances processing and, as appropriate disciplinary action; interpretation of six collective bargaining agreements; advisement of faculty, staff, administrators and supervisors regarding Civil Service law, the SUNY Trustees' Policies and other relevant State and Federal laws; Immigration; Change of Status (COS) processing; data base management; report preparation; pre-retirement education programs for faculty and staff; administering attendance and leave policies for faculty and staff; staff development programs; employee evaluations-both probationary and annual; ethics compliance; production of the campus phone directory; Workers' Compensation; renewal notification for all employees moving toward permanent or continuing appointment; and monitoring the preparation of required Performance Programs and Evaluations for all Fredonia employees and the preparation of the RF payroll.

The Human Resources Office is staffed by the Director of Human Resources, an Associate Director, an Assistant Director of HR-Employee Benefits, a Coordinator of Classified and RF Benefits and Immigration, a Secretary 1, a part-time Clerk, a part-time Database Consultant and a part-time Employee Assistance Program (EAP) Coordinator.

Significant Accomplishments

- Continued to improve communication between HR and the campus community. HR utilized its updated website, listservs, and campus mailing to update employees on such issues as: vacancy announcements, retirement planning, retirement vendor educational seminars, updates to various insurance programs, Civil Service exam information, etc.
- In concert with Academic Affairs and UUP local leadership, commenced the reopening and related negotiations on the Handbook on Appointments, Re-appointments and Promotions (HARP).
- Developed and introduced FREDtraining to campus.
- Partnered with the Office of Diversity, Equity, and Inclusion to draft updated Faculty and Professional Staff Search Guidelines.
- Developed and introduced a campus-based Retirement incentive program. Conducted a detailed review of a search in Academic Affairs.
- Updated Interview Exchange, Fredonia's new online applicant tracking system to better serve the needs of applicants and users via integration into the online COS process.
- Updated the online benefit orientation program for part-time faculty and professional staff.
- Continued to respond to an ongoing Equal Employment Opportunity Commission (EEOC) complaint.
- Continued fact-finding to assist in responding to a NYS Department of Labor case.

- Hosted a well-received benefit-related program on *Maximizing Your Benefits* that included: Estate Planning, Public Employment and possible College Loan Forgiveness, NYSHIP Option Transfer, 529 College Saving program and Tuition Waivers and Reimbursement.
- Responded to an Improper Practice Charge filed with the NYS Public Employee Relations Board by CSEA Inc.
- Conducted in-person Prevention of Workplace Violence training program for classified staff and Professional staff in Facilities Services.
- Utilized Interview Exchange to conduct 70 searches and trained 600 search committee users.
- Coordinated seven employee benefit consultation days with TIAA-CREF, two days with MetLife, two days with Valic, two days with ING and two days with the New York State Deferred Compensation Plan. Additionally, each vendor gave one group presentation in the spring and fall semesters affording University staff direct vendor contact and expertise.
- Distributed 40 recruitment brochures to support the hire of Faculty, Professional and MC staff.
- Updated nine benefit brochures representing each bargaining unit. The pamphlets summarize the various benefits provided to employees. The brochures are available to all hiring managers to assist them in their recruitment efforts and also to position Fredonia as an "Employer of Choice."
- Revised Reporting Services reports to assist University Administration in managing such HR issues as: salary administration, reclassification, ethics compliance and employee renewals.
- Continued to produce automated renewal/non-renewal notices to assist supervisors and VP's in the reappointment or non-renewal of all non-teaching professionals.
- Produced the 2013-2014 campus Phone Directory.
- Assumed management of vacancy advertising.
- Provided Community Service via active participation on the following committees: SUNY WNY Regional Consortium, SUNY HR Executive Committee Rewards and Recognition Committee, Campus Equity, Diversity and Inclusion Committee, Chautauqua Leadership Network, EAP Committee, SUNY Fredonia Federal Credit Union Board, Council for Women's Concerns, Senate Planning & Budget Committee, Campus and Community Children's Center Board of Directors, Student Affairs Judicial Board, Veterans Recognition Committee, Professional Development Advisory Board, Professional Development Associates Program, Commencement volunteers, the Northeast Pennsylvania Higher Education Resource Consortium, and State Employees Federated Appeal (SEFA) /United Way Committee.
- Maintained positive and professional relations with campus unions.
- Achieved 100% compliance with NYS Ethics reporting regulations.
- Participated in NYS/CSEA Labor/Management Committee training with newly appointed CSEA board.
- Partnered with the Office of Diversity, Equity, and Inclusion and the Student Counseling Center to host the 1st Annual Partners-In-Purple event to raise awareness and support for the prevention of Domestic Violence (approximately 85 attendees).

Statistical Data

- Distributed, received and processed 1,034 SEFA pledge forms that resulted in the campus raising \$47,184 (103% of goal).
- Issued 5,573 FREDtraining compliance modules. Witnessed 5,100 modules completed, or 91+% completion rate.
- Conducted two Retirement Incentive (RI) “Open Sessions” that were attended by 34 university employees. Met with 15 employees to further discuss the RI. Eight employees accept the RI, yielding \$154,779 in salary savings.
- 38 employees attended a seminar on Estate planning.
- In conjunction with WNY and NE Pennsylvania collegiate partners, continued a “trailing spouse/significant partner” recruitment program. 345 applicants viewed Fredonia employment opportunities through the Northwestern Pennsylvania HERC.
- Received and filed 320 Performance Evaluations for Classified, Professional and M/C staff.
- Received and filed 215 Performance Programs for Professional and M/C staff.
- Established and monitored 31 Classified staff probations.
- Opened or managed 28 Workers’ Compensation cases.
- Processed 2,500 SUNY HR and 245 New York State Electronic Personnel (NYSTEP) transactions.
- Processed 2,500 COS forms.
- Processed 2,500 SUNY HR and 245 NYSTEP transactions.
- Completed 120 pre-employment screens.
- Processed new hires: ensured employment files established, paperwork prepared for payroll and appointment letters completed and benefits consultations provided.
- Prepared and distributed separation letters.
- Secured MC designation for three positions.
- Processed 40 promotions.
- Prepared and posted 70 Fredonia vacancy notices (Classified, Professional and teaching positions) ensuring compliance with appropriate provisions of negotiated Agreements.
- Designed and implemented procedural change for finalist only pre-employment screening resulting in cost savings.
- EAP programming for this cycle included: Unfinished Projects Workshop, Bike to Work Week, Stress Management Workshop, Interludes, Mediation Circle, “Smoothie-Days”, Wellness for the Holiday’s fair, Tuesday on Time, to name but a few.
- Conducted salary analysis for seven UUP-represented positions.
- Analyzed and provided recommendations on five CSEA-represented positions.
- Analyzed and provided recommendations on two MC positions.
- Four Professional staff were non-renewed without incident.
- Processed 102 Tax Deferred Annuities (TDA) enrollments and changes.
- Conducted orientation program for 20 newly-hired colleagues.
- Conducted/created 20 Classified employee searches or job announcements.

- Created and distributed bid sheets for internal, classified lateral transfers and promotions.
- Created, distributed and coded canvass letters for competitive and classified searches.
- Provided benefit consultations for new hires, retirees and those considering retirement.
- Processed 156 Honorarium requests.
- Personal retirement consultations were provided to a total of 85 employees by: ING, VALIC, MetLife, TIAA-CREF and New York State Deferred Compensation Plans.
- 11 employees, their dependents and departments were assisted in dealing with Immigration issues.
- Provided 50 Leave of Absence and FMLA consultations.
- 212 employment verifications were conducted for such things as mortgage verification, UUP's Tuition Assistant Program, the Tuition Waiver Program, issuance of ID cards, etc.
- Processed all requests from departments for labels and reports. Provided labels or information from labels printed directly onto mailings for Wellness Committee, SEFA, billing for employee telephone bills, EAP, Secretarial/Clerical Conference, etc.
- The past review cycle was again an active one for the Employee Relations area. Specifics include:
 - Four CSEA grievances were filed by CSEA-represented staff. All were informally resolved at step one.
 - Two grievances were filed by a UUP-represented employee. One was resolved at step one. The other was resolved at a later stage.
 - One UUP step two hearing was held. The matter was subsequently resolved.
 - Two New York State PERB complaints were responded to via extensive research and fact-findings. A written brief was created and submitted. The matter were subsequently withdrawn by the moving union.
 - Successfully mediated a Hostile Work Environment claim.
 - Provided consultation and guidance on Research Foundation Employee Relations matters.
 - Assist in introducing a tobacco-free program to University.
 - Three Settlement Agreements were achieved involving CSEA-represented employees.
 - Three Notice of Disciplines and various counseling memos were issued.

Responding to grievances, Improper Practices (IP's), Division of Human Rights and EEOC claims is a time-consuming and labor-intensive process. Witnesses must be interviewed, facts and evidence gathered and analyzed, past-practice studied, system-wide implications addressed, counsel secured from both SUNY Administration and Legal, contract language analyzed, and settlement positions considered.

Assessment Update

Assessment Goals

- Successfully distribute and train colleagues on revised search procedure processes.
- Maintain positive relations with all campus unions.

- Successfully re-negotiate HARP.
- Professionally represent Fredonia at a NYSCOPBA Arbitration and an ongoing Legal matter involving a UUP-represented employee.
- Update the Classified Staff Employee Handbook.
- Produce online benefit orientation for full-time UUP-represented professionals.
- Assume larger HR-related role re: RF operations.
- Assist in the development of department Faculty and Professional staff Handbooks.
- Continue to utilize FREDtraining compliance training modules striving for 100% compliance.
- Continue to provide timely and accurate benefit advice and problem resolution for University staff.
- In partnership with Facilities Services, complete Green Cleaning training program and conduct said program for all Custodial staff.
- Produce 2014-2015 campus Phone Directory.
- Provide advice and guidance to campus Management on ITS reorganization.
- Conduct, in partnership with the PDC and TIAA-CREF, a Financial Literacy Series for all campus staff.
- Provide leadership to both the SUNY HR Committee and the WNY HR Directors Consortium and support campus initiatives via participation in various committees.
- Cross-train HR staff in discipline functions with an emphasis on the Benefits area.
- Enhance Reporting Services to the campus.
- Successfully represent the campus at an upcoming Arbitration and ongoing EEOC claim.

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 the State University of New York at 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 distribution of paychecks for the purpose of reviewing employment and payroll procedures, periodic review of authorized cash handling/cash collection sites, periodic review of procurement card activity, issuance of periodic Internal Control *Fast Facts*, bank verification of Fredonia accounts, and analysis of revenue and expenditures within various IFR accounts. The Director of Internal Control is the TouchNet Marketplace Chief Administrator, the campus FOIL Officer, and the campus Records Management Officer (RMO). In addition, all new IFR custodians are trained on the proper handling of funds and the biweekly Student Association payroll is reviewed and monitored.

Annual required reporting to the 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 letter from the President to all campus employees.

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, and the Research Foundation online computer systems. The Director of Internal Control chairs the campus-wide Internal Control Committee and the campus-wide Trademarks and Licensing Committee. The Director is also the co-chair of the campus-wide Information Security Program Team, the E-Discovery Response Team and the campus-wide Policy Advisory Group, in addition to being an active member of various other campus-wide committees, including but not limited to the Council for Women’s Concerns, Clery Act Committee, FPAC and Building Safety Coordinators.

Significant Accomplishments

- Conducted semi-annual Internal Control Committee meetings.
- Maintained the Internal Control Program structure and followed the established timeline for major events.
- Completed two scheduled Internal Control reviews.
- Distributed Internal Control brochures related to paychecks and the general Internal Control environment.

- Successfully submitted responses to multiple FOIL requests.
- Reviewed cash handling procedures in multiple departments.
- Maintained a fully functioning Internal Control Program.
- Maintained and expanded the TouchNet Marketplace by successfully developing over 160 uStores and two uPay sites to date, totaling over 31,000 transactions and \$4.7 million in collected funds.
- Continued assisting SUNY Legal Counsel in the completion of a SUNY-wide e-discovery RFI.
- Chaired the Internal Control Committee, chaired the Trademarks and Licensing Committee, co-chaired the Policy Advisory Group.

Statistical Data

Marketplace Web Credit Card Payments							
Month							% Increase/Decrease
	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	from Prior Year
July	n/a	\$1,592.00	\$14,298.34	\$38,924.29	\$48,274.46	\$26,477.99	-45%
August	n/a	127.00	5,815.00	20,211.94	20,760.43	112,939.71	444%
September	n/a	4,598.00	16,698.64	17,699.09	230,384.75	42,303.29	-82%
October	n/a	13,596.00	154,350.00	113,504.98	96,595.33	89,187.97	-8%
November	n/a	2,335.00	9,934.64	145,925.14	160,676.16	184,706.92	15%
December	n/a	8,096.00	19,547.34	17,253.47	65,269.17	102,248.65	57%
January	n/a	30,075.65	147,979.99	162,676.76	135,192.15	54,775.80	-59%
February	n/a	5,241.60	35,490.81	96,429.62	71,320.58	99,856.61	40%
March	n/a	3,510.00	64,909.13	98,529.67	155,344.18	88,923.86	-43%
April	n/a	104,823.00	92,913.11	145,616.98	141,787.67	96,408.07	-32%
May	2,204.00	68,778.00	73,218.62	86,500.62	124,989.71	102,269.28	-18%
June	790.00	46,995.50	60,174.71	55,193.91	64,412.87	69,210.07	7%
Total	\$2,994.00	\$289,767.75	\$695,330.33	\$998,466.47	\$1,315,007.46	\$1,069,308.22	
Net Increase		9578.28%	139.96%	43.60%	31.70%	-18.68%	

Marketplace Webcheck Payments							
							% Increase/Decrease
Month	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	from Prior Year
July	n/a	\$12.00	\$332.00	\$494.00	\$460.00	\$985.70	114%
August	n/a	11.00	367.00	524.00	533.00	5,177.43	871%
September	n/a	121.00	335.00	453.00	563.00	123.81	-78%
October	n/a	186.00	424.00	373.00	481.00	4,581.30	852%
November	n/a	89.00	395.00	394.00	378.00	9,656.35	2455%
December	n/a	98.00	361.00	447.00	532.00	5,544.35	942%
January	n/a	227.00	492.00	570.00	477.00	4,336.71	809%
February	n/a	156.00	448.00	596.00	495.00	11,957.84	2316%
March	n/a	189.00	411.00	405.00	351.00	3,520.90	903%
April	n/a	1,002.00	755.00	847.00	708.00	11,175.70	1478%
May	23.00	776.00	706.00	701.00	992.00	7,513.48	657%
June	3.00	668.00	669.00	623.00	672.00	2,905.20	332%
Total	\$26.00	\$3,535.00	\$5,695.00	\$6,427.00	\$6,642.00	\$67,478.77	
Net Increase		13496.15%	61.10%	12.85%	3.35%	915.94%	

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 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. 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 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 as noted above. Recommendations were issued where weaknesses were detected 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 our goals and objectives. All audit findings and recommendations were also included in the Internal Control progress report prepared, and submitted as required, to System Administration as well as the Internal Control Summary that accompanied the Internal Control Certification signed by the President. The OSC Accounts Payable Advisory # 28 which required evaluation of the adequacy of controls over the payment process in SFS, Legacy and SUNY Systems was also completed.

Assessment Goals

- Increase awareness of our Internal Control Program.
- Update the campus-wide Internal Control Brochure.
- Conduct program reviews as required by System Administration.
- Oversee random reviews of procurement 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.
- Timely response to situations warranting internal control review.
- Develop and issue campus-wide training on Internal Control via WeComply.
- Develop and issue informative *Fast Facts*.
- 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
 - AIT
 - RAC
 - Career Development Office
 - Student Health Center
 - Campus Life
 - University Police
 - 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
- Academic Advising
- Computer Science Department
- Field Experiences
- History Department
- Accounting Office
- Professional Development Center
- Environmental Health and Safety
- Foundation
- President's Office
- Residence Life
- Human Resources
- Alumni Affairs
- Research Foundation
- Sport Management & Exercise Science
- Athletics
- EDP
- Student Association
- Fredonia Technology Incubator
- Youngerman Center

University Services

- **Campus Photocopy Services**
- **Central Receiving**
- **Central and Mechanical Storehouses**
- **Contracts/Agreements**
- **Fleet Vehicle Services**
- **Garage/Automotive Services**
- **Mail Services**
- **Park and Ride**
- **Property Control**
- **Telecommunications**

UNIVERSITY SERVICES

Introduction

University Services, under the leadership of the Director of University Services, is responsible for providing general support services to the campus community such as contract procurement, asset tracking, parcel receiving, delivering of supplies, mail, and telecommunications to name a few. The units under University Services include the offices of:

- Campus Photocopy Services
- Central Receiving
- Central Storehouse
- Contracts/Agreements
- Fleet Services
- Garage/Automotive Services
- Mail Services
- Mechanical Storehouse
- Park & Ride
- Property Control
- Telecommunications



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 enhance the academic mission of the University, and ensure 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. University Services strives to fulfill the University's mission in education, research, economic and cultural/social development of our students.

In Fredonia's Vision Statement, it states "Fredonia's professional staff will continue its strong contribution to student development and learning outside of class"; 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.

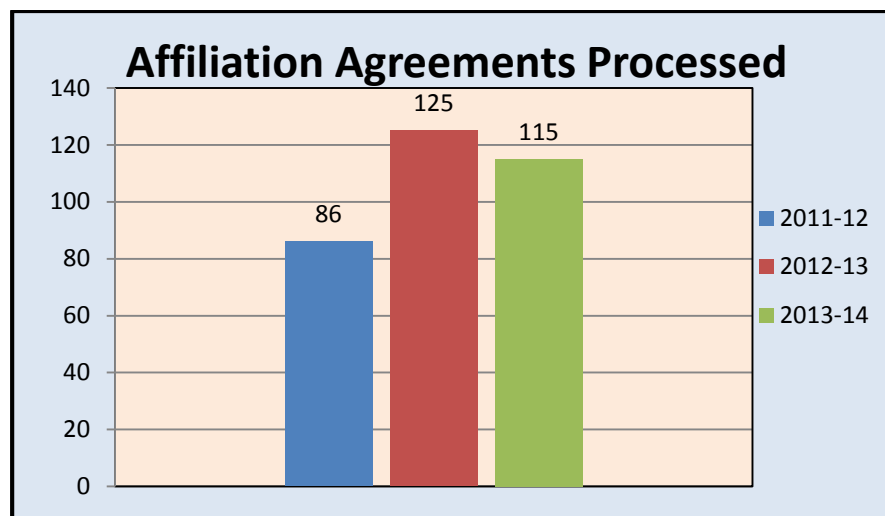
Equally important, University Services has gained from these very students that we are teaching. The statement "as a community of learners, we must respect both individual and cultural differences" reminds us that we too have learned so much from our students.

Annual Report

The Director of University Services is responsible for the supervision of the various departments stated previously. The Director is also 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 reviews 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 115 affiliation agreements for the campus.
- Bid for Internet Service to the campus with a savings to the campus.
- Five year fixed cost contract with Casella Waste Services for trash removal.
- Numerous equipment bids/Purchase Orders for new Science Building.
- Processed software/miscellaneous agreements.
- Involvement with the Campus and Community Electronic Recycling Day.
- Involved in the SUNY initiative of Shared Services.
- Involved with the Administrative workshops for campus departments.
- Member of the Board of Directors of the SUNY Purchasing Association.
- Served on the Board of Directors of the Upstate New York Region of the National Association of Educational Procurement.
- Attended the National Association of Educational Procurement (NAEP) national conference, 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 and Chair of the Credit Committee.
- Member of the Sustainability Committee and co-chairman of the Recycling 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.
- Completion of combining Central and Mechanical storehouses.

Assessment Goals

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

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., we will excel in fulfilling your copying needs. We have a total of nine photocopy centers situated across campus to meet the needs of our faculty and staff. Their locations are:

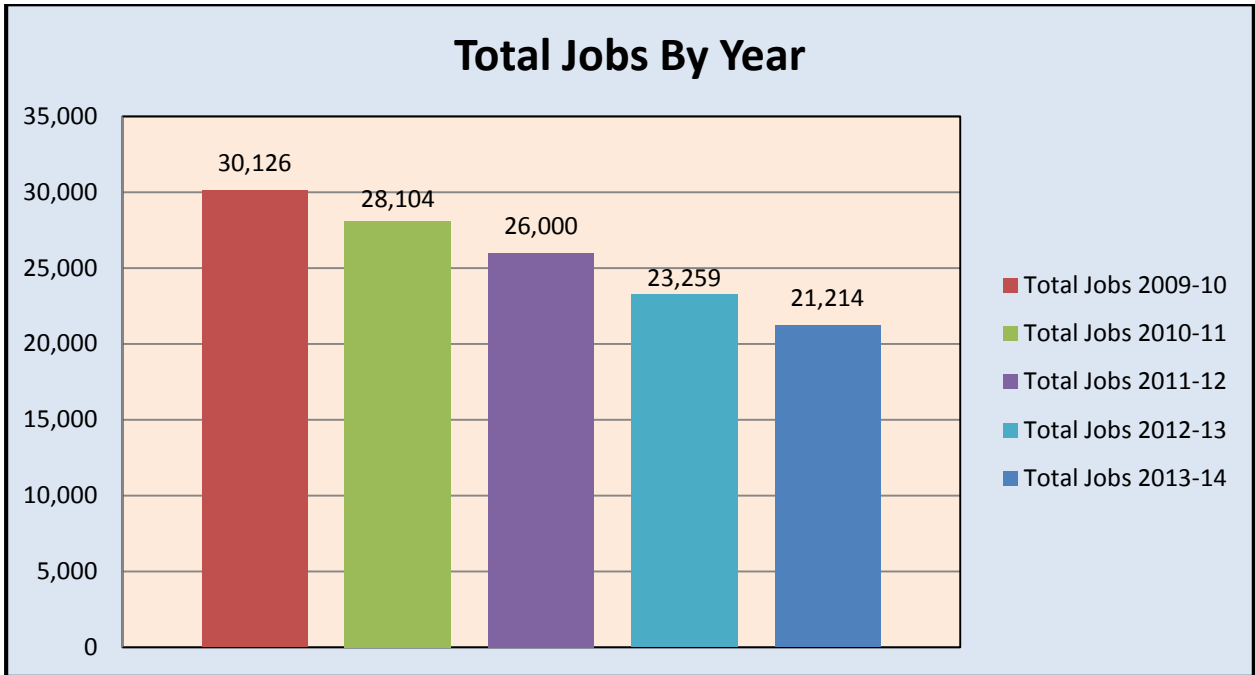
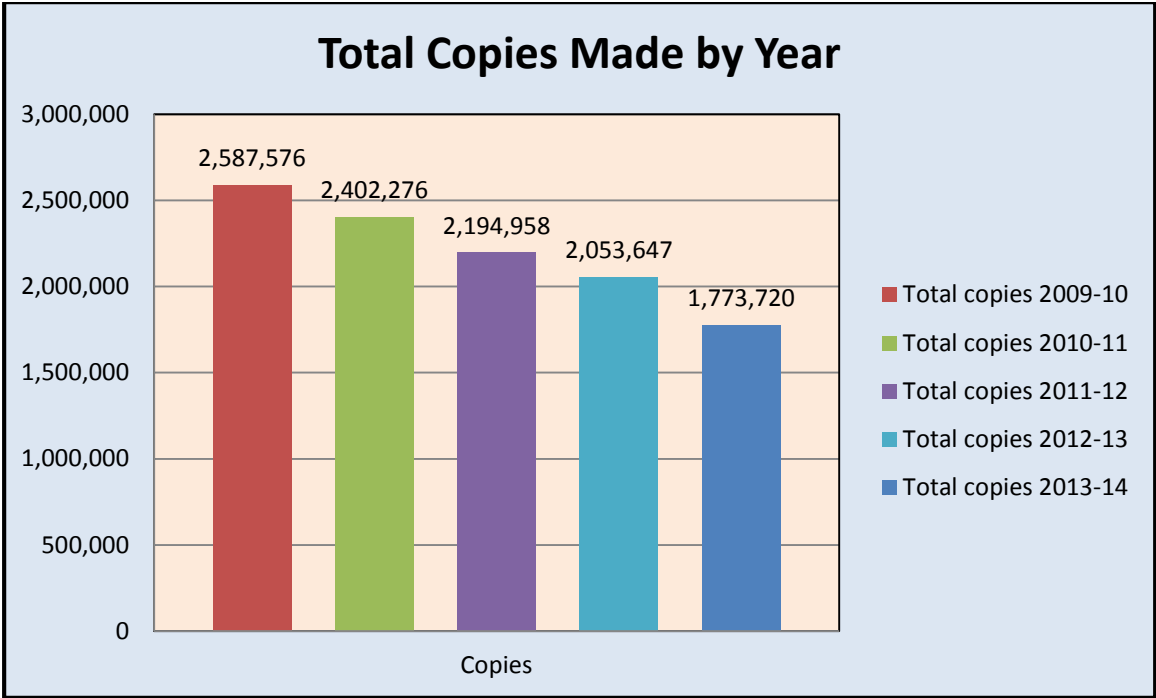
- Thompson Hall, Room E357
Main Manned Center
- Thompson Hall, Room W251
- Fenton Hall, Room 155
- Houghton Hall, Room 118
- Jewett Hall, Room 229
- McEwen Hall, Room 323
- Services Complex, Main Office
- University Police, Gregory Hall
- Campus Life, Williams Center

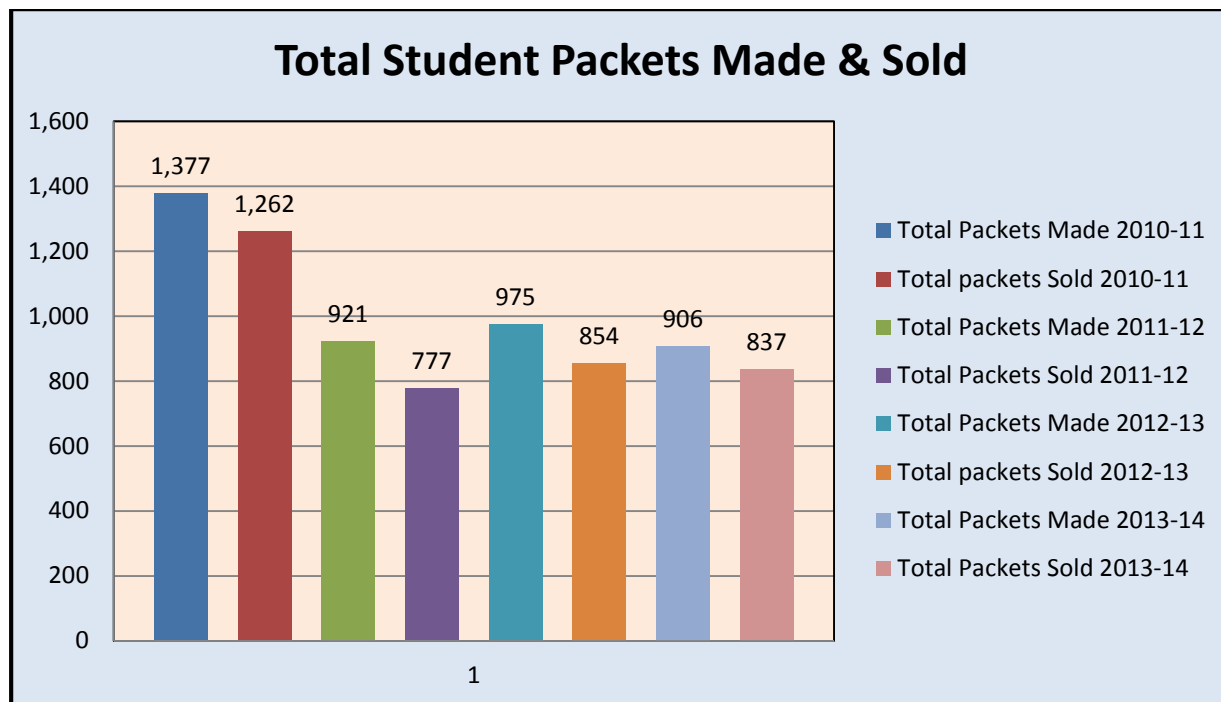
The costs at all centers are tracked to evaluate usage and possible future cost savings. This department was able to maintain the current pricing structure to the departments at the same cost as in previous years, even though some supply costs have risen. As machines age, we are replacing them with new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

The Campus Photocopy Services Department is staffed by a full-time Clerk I and three part-time Green Thumb workers. We anticipate the retirement of the current Clerk I in October 2014.

Significant Accomplishments

- Maintained cost to departments at same level as 2012-2013.
- Replaced two campus wide copiers with new models with digital capabilities.
- Reduction of photocopies made in 2013-2014 of 15.78%.
- There were 21,214 jobs with 1,773,720 copies made at the centers this year.
- We made 906 student packets, and we sold 837 packets this past year; this represents a decrease of 7.6% in packets made, and a decrease of 2% in packets sold.





Assessment Update

Assessment Statement

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

Assessment Activities

- While this department saw a reduction of copies made for the past year, we were still able to keep the price per copy the same for our customers.
- We had a decrease in student packets made and sold.

Assessment Goals

- Upgrade Thompson Hall photocopy equipment that is over five years old to provide un-interrupted service to our customers.
- 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 new web based receiving module which replaces old legacy 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 a 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 Stores Clerk 2 and one Stores Clerk I.

Significant Accomplishments

- There were 30,894 packages received.
- There were 534 common carrier, and three truckload deliveries received.

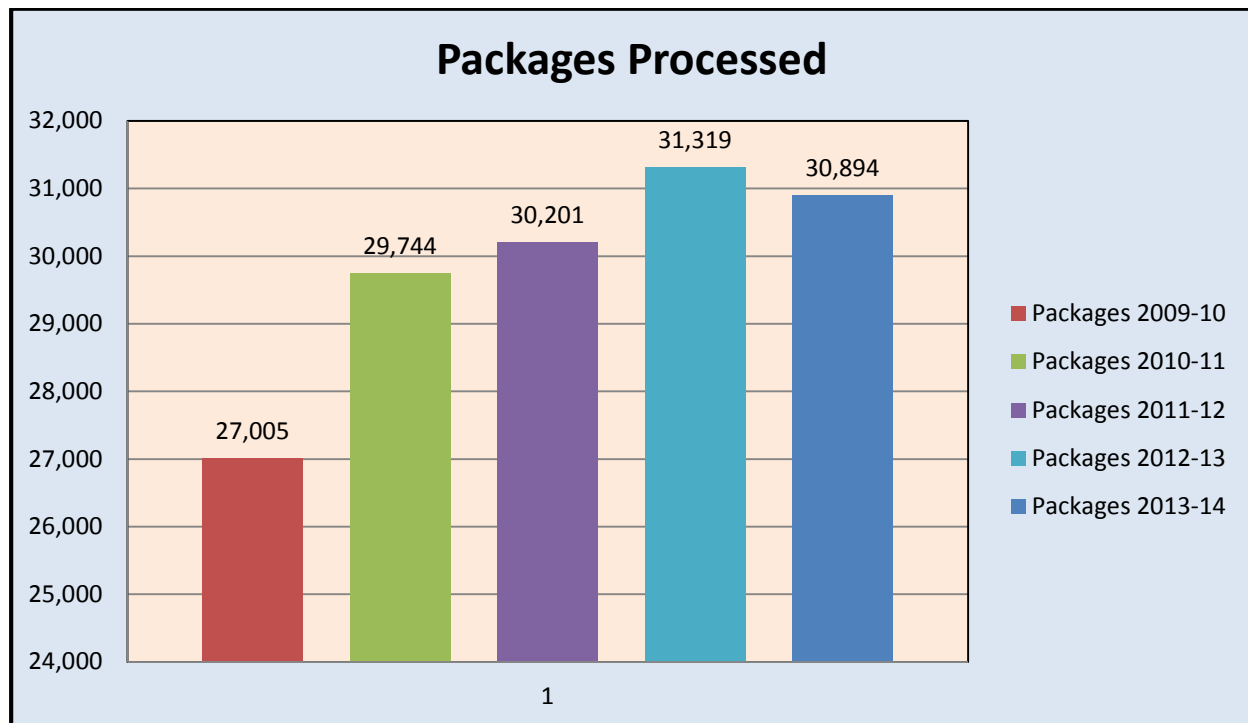
Statistical Data

- | | |
|---|--------|
| • UPS packages received: | 24,887 |
| • Federal Express Ground Service packages received: | 3,996 |
| • Express (FedEX) packages received: | 1,003 |
| • Prestige packages received: | 937 |
| • Miscellaneous deliveries | 41 ** |
| • Common carrier deliveries received: | 487 ** |
| • Individual vendor deliveries received: | 71 |
| • Truckload deliveries: | 3** |

** Note: Common Carrier and Truckloads numbers are the number of deliveries, not the total packages received by the deliveries.



From left to right: Mason Riggle and Carol McKinnis



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.
- Consolidation of the mechanical storehouse to the central storehouse where space was available is complete.
- Central Receiving, Principal Stores Clerk retired.
- New Clerk I was hired.

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 over 280 SKU items with a value of \$200,006.06 at the end of June 2014. The custodial and office supply inventory had increased by 6.0%.

The Mechanical Storehouse is responsible for over 2,500 SKU items with a value of \$431,006.40 at the end of June 2014. 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 71.83%.

The process of combining both storehouses was completed into one area within the existing space constraints of central receiving to afford the efficient distribution of supplies.

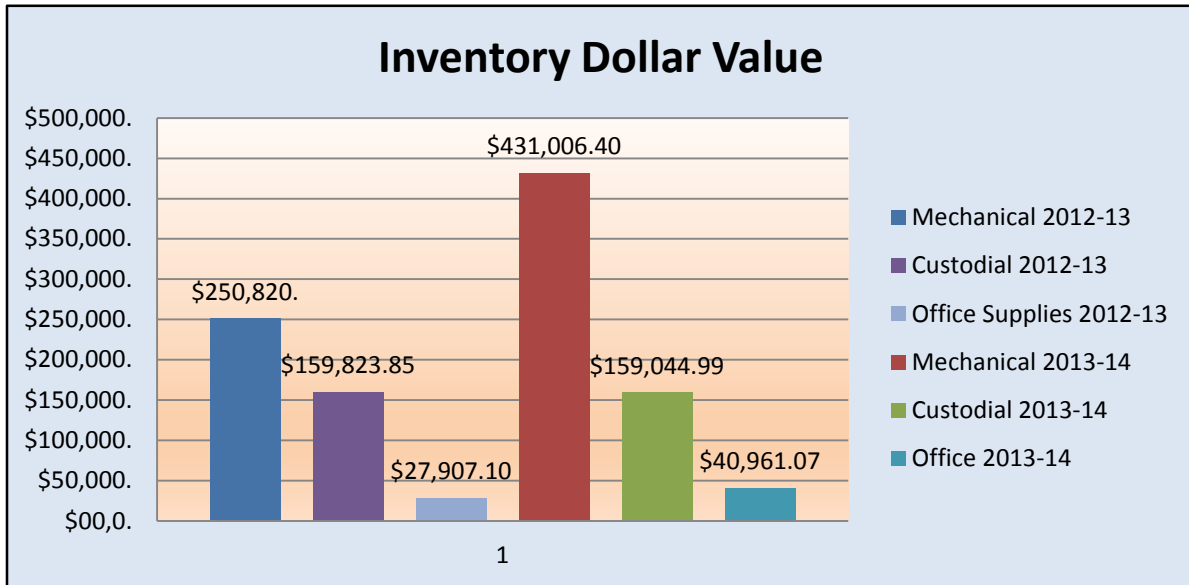
The Central and Mechanical Storehouses are staffed by the Central Receiving personnel.

Significant Accomplishments

- Office supplies inventory items increased by 40% over fiscal year 2012-2013; this brought the inventory to \$40,961.07.
- Custodial supplies inventory items decreased by 1.0% over fiscal year 2012-2013; this brought the inventory to \$159,044.99.
- Mechanical supplies inventory items increased by 71.0% over fiscal year 2012-2013; this brought the inventory to \$431,006.40.

Statistical Data

- Custodial supplies inventory: \$159,044.99.
- Office supplies inventory: \$40, 961.07.
- Mechanical supplies inventory: \$431,006.40.



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 able to reduce our inventory of supplies.

Assessment Goals

- Reduce inventories.

Fleet Vehicle Services

Annual Report

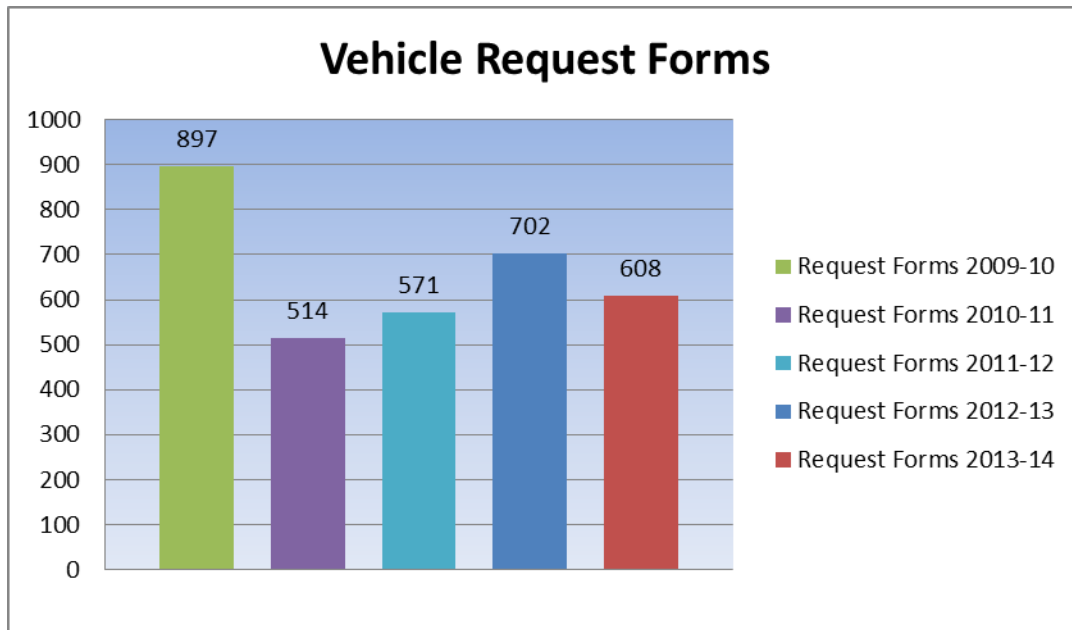
University Services is responsible for managing the campus fleet of vehicles. It is under the supervision of the Director of University Services and one clerical support person. The unit is responsible for the scheduling of all fleet vehicles for faculty and staff use. There are sixteen fleet vehicles and six athletic vehicles which are scheduled out of this office.

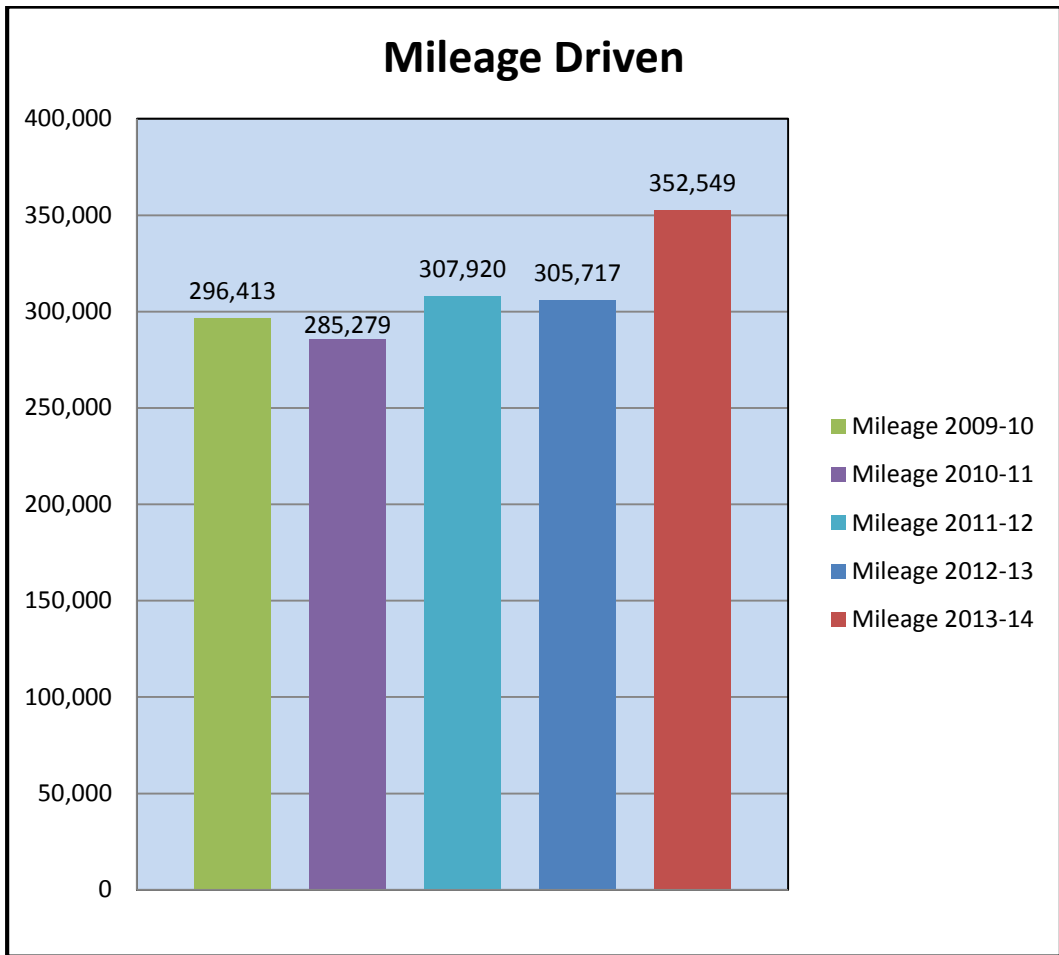
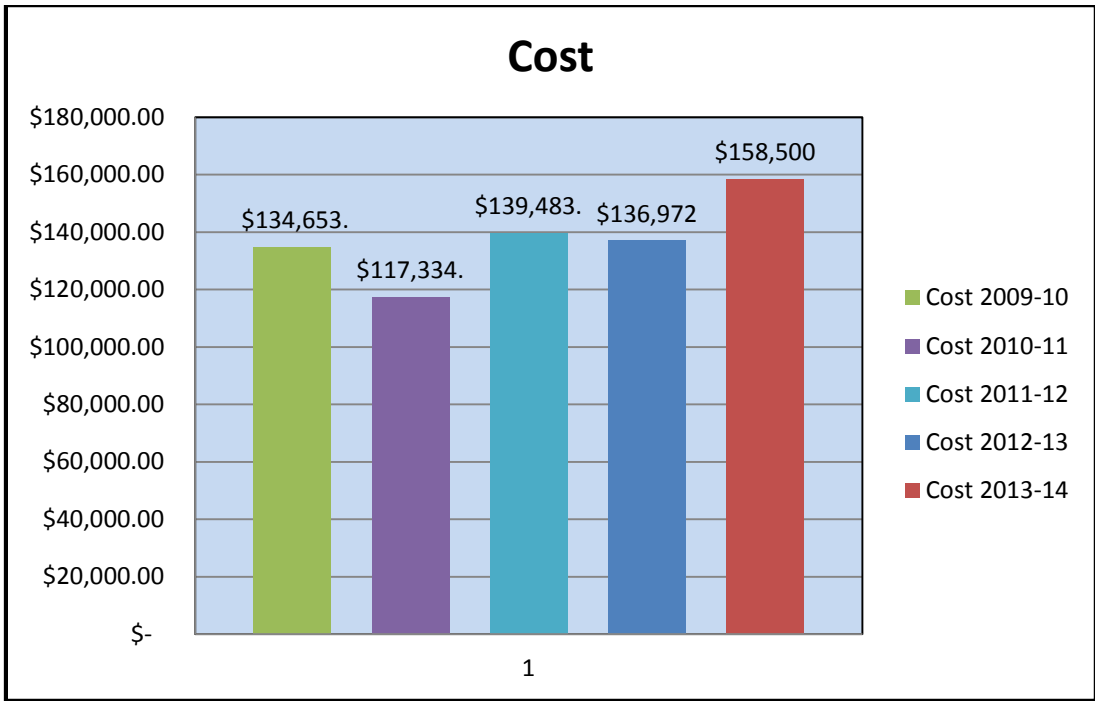
Significant Accomplishments

- Enhanced the University Vehicle Request procedures to provide for better service to the campus.
- There were 608 request forms processed; a decrease of 15.5% over 2012-2013.
- A total of 352,549 miles were driven in 2013-2014; an increase of 15.3% over 2012-2013.

Statistical Data

- For 2013-2014, there were 608 vehicle request forms processed.
- For 2013-2014, 352,549 miles were driven by all fleet vehicles at a total cost of \$158,500.43.





Assessment Update

Assessment Statement

The Fleet Vehicle Services unit provides consistent quality customer service to ensure all vehicles are safe and ready for use for campus faculty and staff.

Two new vehicles were purchased for the fleet to replace high mileage vehicles.

Assessment Activities

- The data collected from the surveys was analyzed and shared with the staff in the Garage Services unit to enable the staff to better understand the needs of the campus, and to continue improving customer service, efficiency and quality.

Assessment Goals

- Provide efficient, safe vehicles for faculty/staff use.
- Rotate/purchase new vehicles as necessary.

Garage Services

Annual Report

The Garage Services unit is responsible for maintaining the campus fleet of vehicles and motorized equipment. The unit has one Maintenance Supervisor and two Automotive/General Mechanics. The staff provides mechanical support to over 100 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 floor cleaning equipment. They repair the campus emergency generators located in many of the buildings on campus and respond to fleet vehicle accidents and equipment malfunctions. The Garage Services unit maintains the gasoline fueling system which provides fuel, using a special key 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 vehicle requests used by campus personnel.



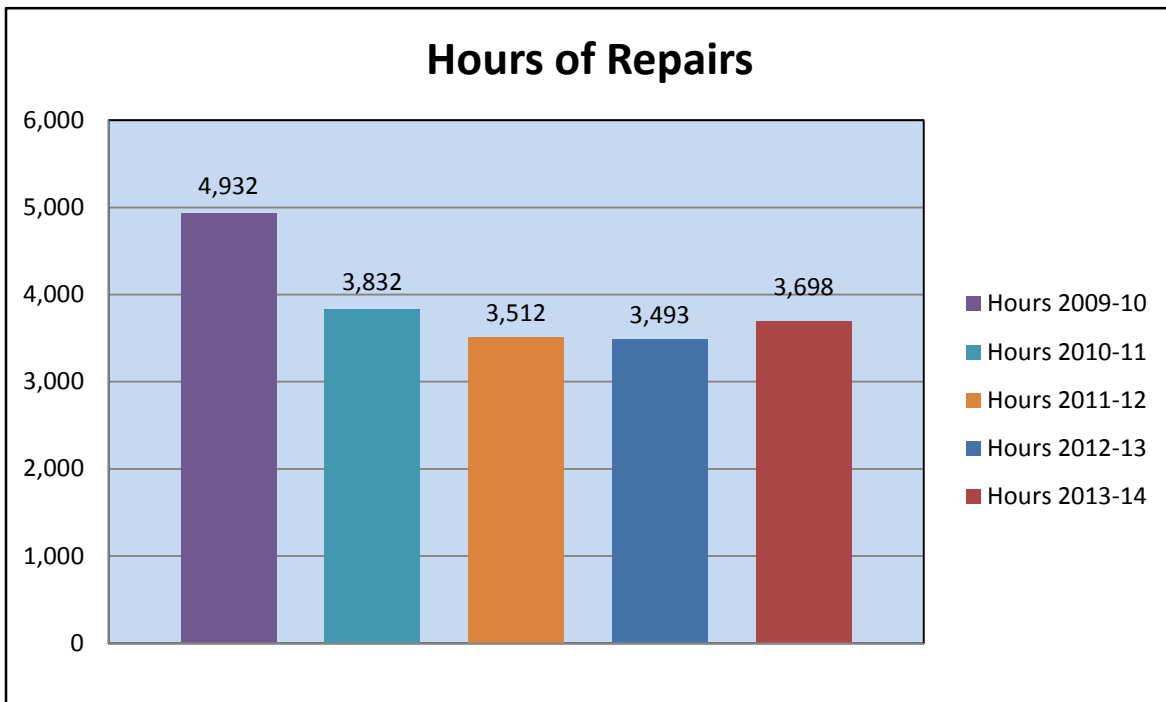
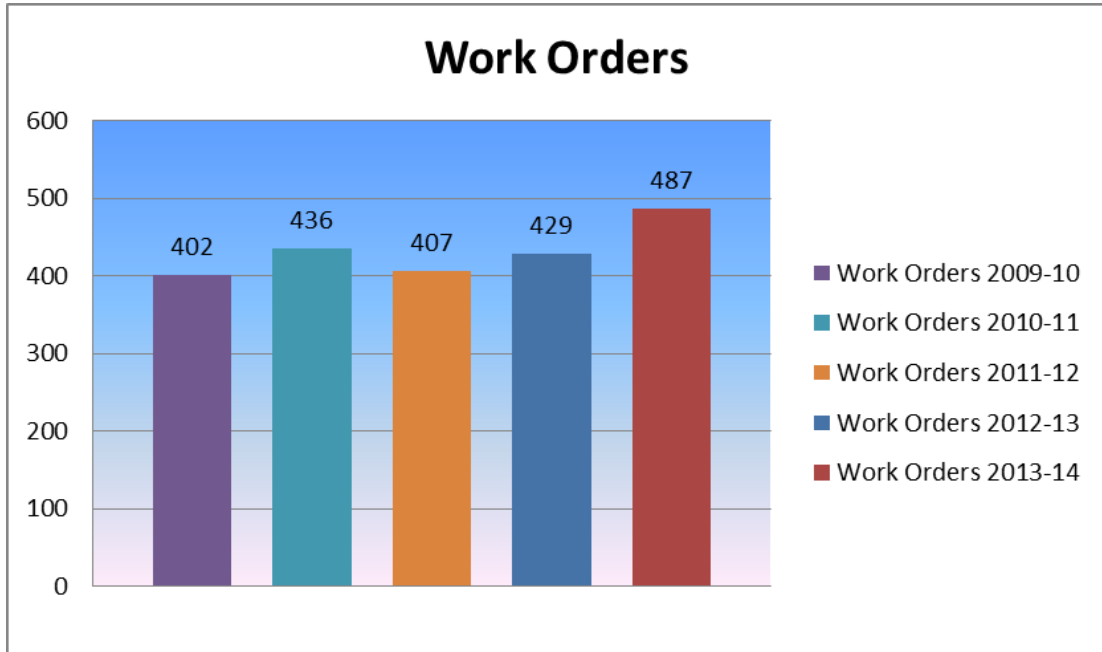
From left to right: John Schmidt, and Justin Jacques

The department is staffed with one Supervisor, and two Grade 12 Mechanics. One Mechanic retired in May 2014 and at the time this report was written the position was not yet filled.

Significant Accomplishments

- Continued to replace various fleet and campus service vehicles, as needed.
- Continued the training of staff on new vehicle repair procedures.
- Enhanced the University Vehicle Request procedures to provide for better service to the campus.
- Prepared, cleaned and fueled fleet vehicles for 608 fleet vehicle requests.
- Responded to various maintenance equipment malfunctions and on-campus building repairs.

Statistical Data



Assessment Update

Assessment Statement

The Garage 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.

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 487 work orders were completed, consisting of 3,698 labor hours.

Assessment Goals

- Continue the training on new equipment for servicing and repairs.
- Keep up to date on new vehicle repair procedures.
- Hire a Mechanic for the vacant position due to a retirement.

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 by one full-time staff position and eight to ten part-time student assistants. The student staff has the benefit of a valuable learning experience in a fast paced work environment. The students play a vital part in the operations of the mailroom. They are exposed to issues of postal regulations, customer service, and are challenged with time constraints, learning first-hand the importance of multi-tasking and teamwork. Among their duties are daily mail deliveries, customer service at the window, and the operation of the postage machine and other office equipment. The student staff is a valuable asset to the department.

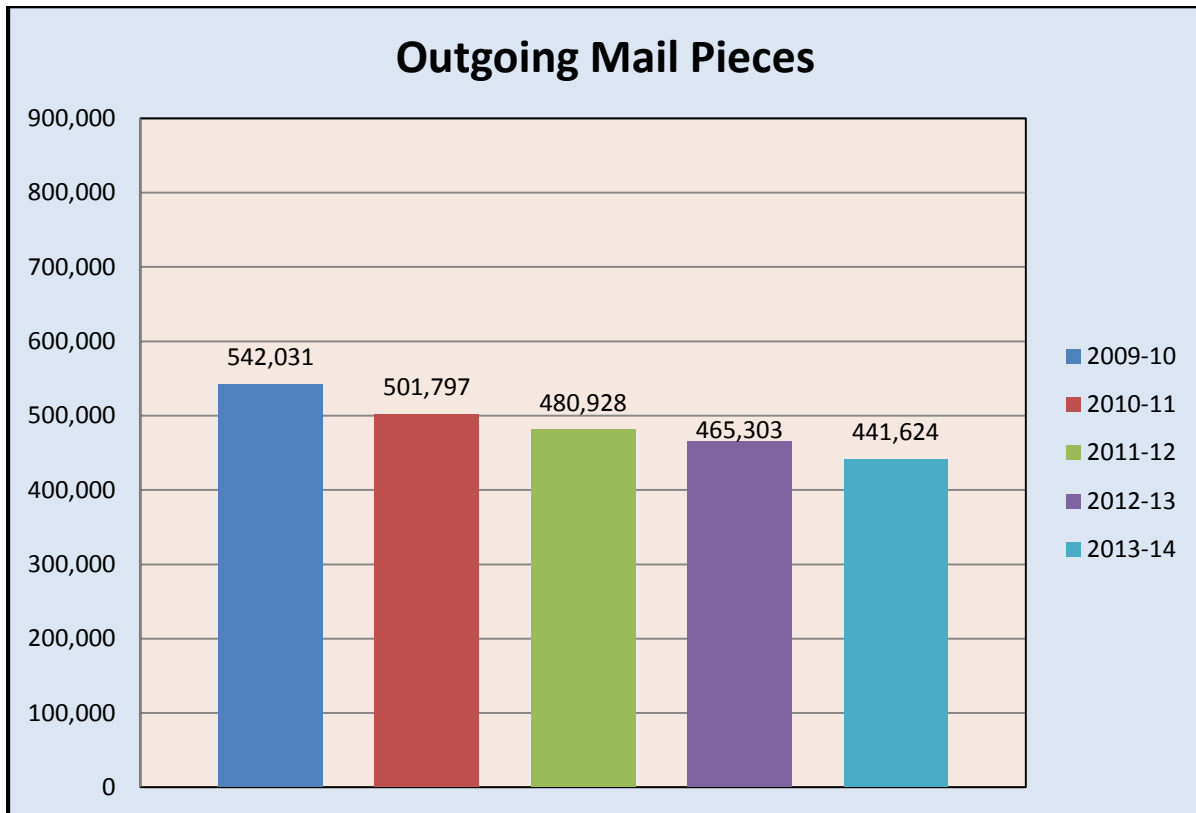


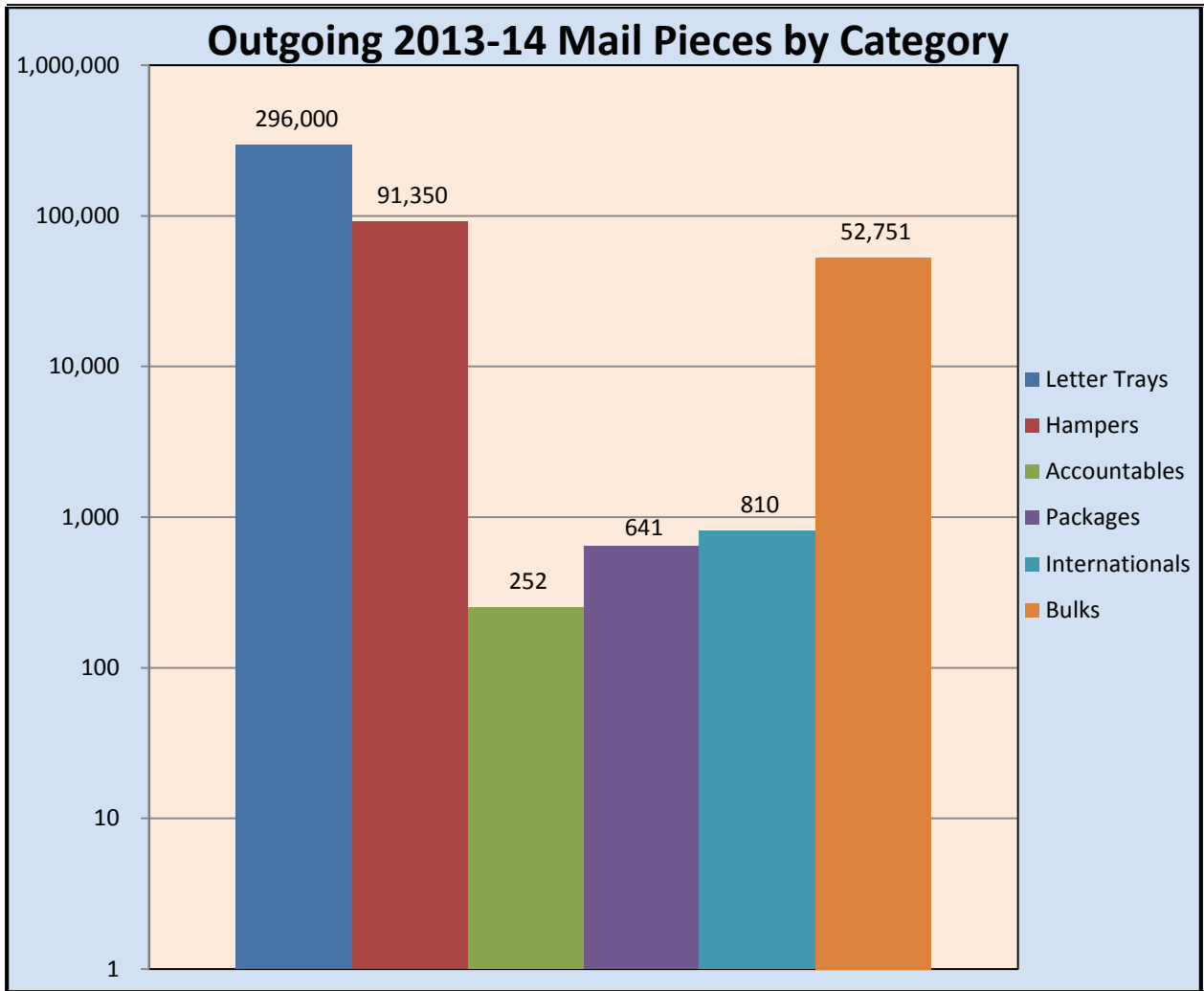
Janet Parsons

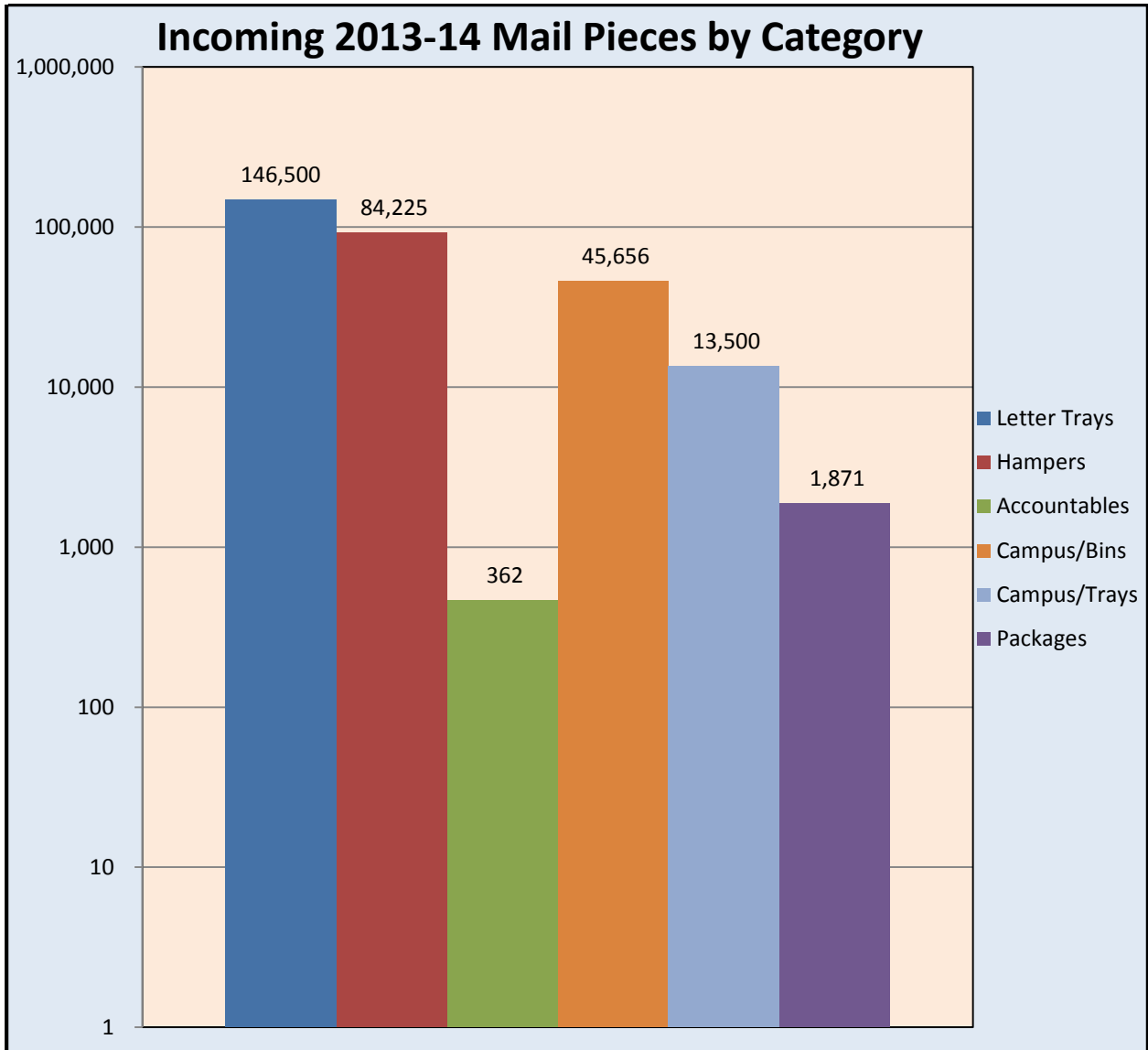
Significant Accomplishments

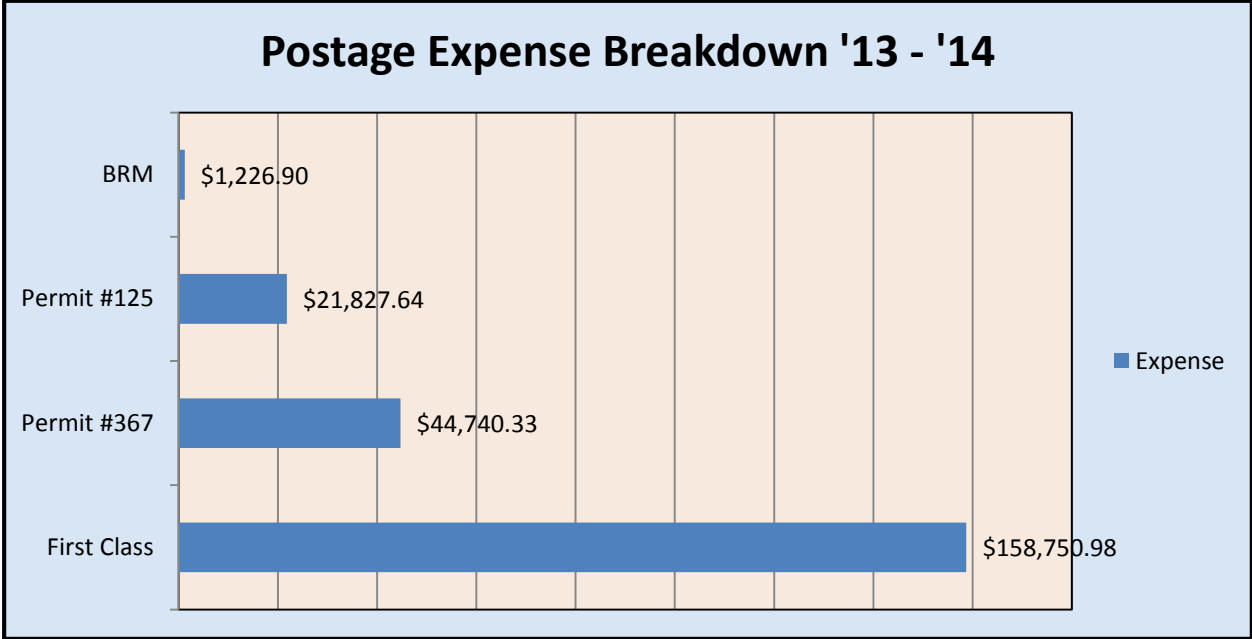
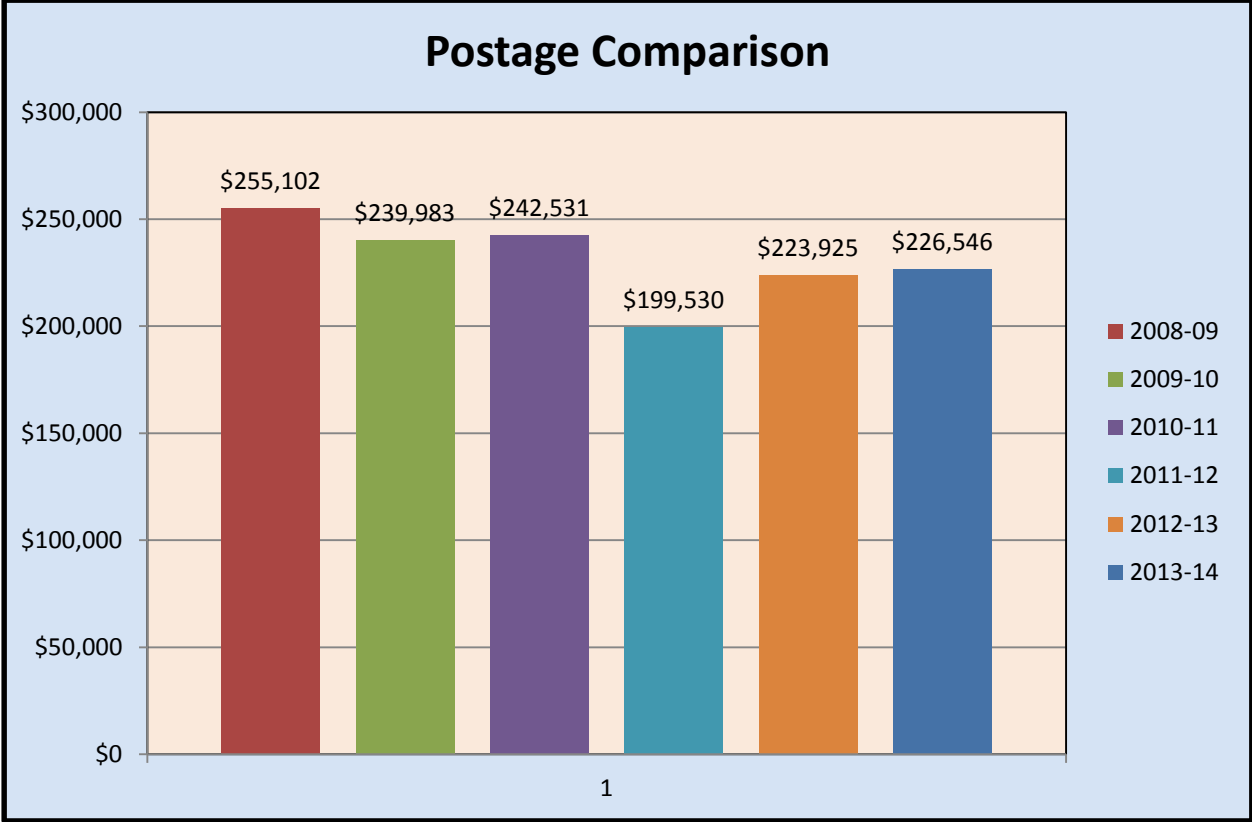
- Deliveries are made to 80 departments and 13 dormitories while five other departments pick up their own mail.
- There were eight student workers for the fall and spring 2013-14 semesters. A total of 71.5 student hours, scheduled per week; a reduction of 8.5 hours.
- In accordance with Internal Control's Mailroom Security the annual training session was held in October 2013. 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.
- Mandatory use of the Intelligent Mail Barcode for BRM/CRM and any permit mailings claiming automation pricing has been delayed by the USPS until January 2015.

- Mail rates increased effective January 26, 2014. First class postage is now \$.48 for a one ounce letter and \$.98 for a one ounce flat with each additional ounce costing \$.21. International rates (one ounce letters) are \$1.15 and other mail class rates have also increased. Commercial Base Pricing is still available to us offering substantial savings for several classes of mail.
- Postage cost increased by 1.15%
- We are researching the pricing of new mail machines. Quotes from Pitney Bowes and Lineage (Hasler) have been considered. The next step is to see both the Connect+ 3000 from Pitney Bowes and the IM 6000 from Hasler in a demonstration running mail.









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

- Overall Postage Expense (2013-2014)
\$226,545.85

Postage Expense – Increase or Decrease (%)

$$\begin{array}{r} 223,925.00 \quad 12 - 13 \\ \underline{226,545.85} \quad 13 - 14 \\ 2,620.85 \\ \underline{2,620.85} \\ 226,545.85 = \end{array} \quad \begin{array}{r} 0.0115 \\ X \quad \underline{100} \\ 1.15 = \end{array} \quad \begin{array}{r} \\ \\ \\ \\ \\ \\ \\ 1.15\% \end{array}$$

- Estimated Incoming pieces

$$\begin{array}{r} 146,500 \text{ trays} \\ 84,225 \text{ bins} \\ 362 \text{ accountables} \\ \underline{1,871} \text{ packages} \\ \hline \end{array} \quad \begin{array}{r} \\ \\ \\ \\ \\ \\ \\ 232,958 \end{array}$$

- Total outgoing pieces (1st class and 3rd class)

$$\begin{array}{r} 389,053 \text{ 1}^{\text{st}} \\ \underline{52,571} \text{ 3}^{\text{rd}} \\ \hline \end{array} \quad \begin{array}{r} \\ \\ \\ \\ \\ \\ \\ 441,624 \end{array}$$

- Total incoming and outgoing pieces

$$\begin{array}{r} 232,958 \\ \underline{441,624} \\ \hline \end{array} \quad \begin{array}{r} \\ \\ \\ \\ \\ \\ \\ 674,582 \end{array}$$

- Estimated Intra-Campus Mail pieces 59,156

- Total pieces handled per day
 59,156 (intra-campus per year)
 + 674,582 (federal per year)
 733,738

Yearly total 733,738
 Days 249 = 2,947 pieces per day

Statistical Averages

Overall the mailroom processed approximately 441,624 pieces of outgoing mail. This is a combination of approximately 387,350 pieces of first class mail and 54,274 pieces of other and standard bulk mail. The staff also received, sorted and delivered approximately 231,087 pieces of incoming federal mail and 61,027 pieces of intra-campus mail. In total, the mailroom staff handled about 733,738 pieces of mail this year. On average about 2,947 pieces of mail are handled daily.

Assessment Goals

- Continue to educate campus community on cost saving ideas for mail design and postage.
- Instruct interested departments on the qualifications and advantages of bulk mailings and how to prepare them.
- Strive to improve sorting accuracy and to make departmental deliveries promptly and accurately.
- Update website to include correct mail addressing for students, parents and departments. Also add more information on preparing cost effective mail and bulk mailings.

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 next to the Services Complex, to academic and administrative buildings on campus. Park and Ride is reliable, fast, friendly and free. There is no need to wait in any of the parking lots for a parking space. Students do not have to be late for classes, and faculty and staff do not have to put off running an errand, or worry about the weather.



From left to right in front: Jim Schwerk, John Schmidt, and Jim Pinkowski; in back: Tim McGraw, Jim Oddo, Tom Taylor and Gil Uhlendorff

The Park and Ride Shuttle Service employs seven part-time drivers, who all offer a pleasant attitude to start or end your day. Each driver offers a safe and courteous ride, and little waiting times between bus runs.

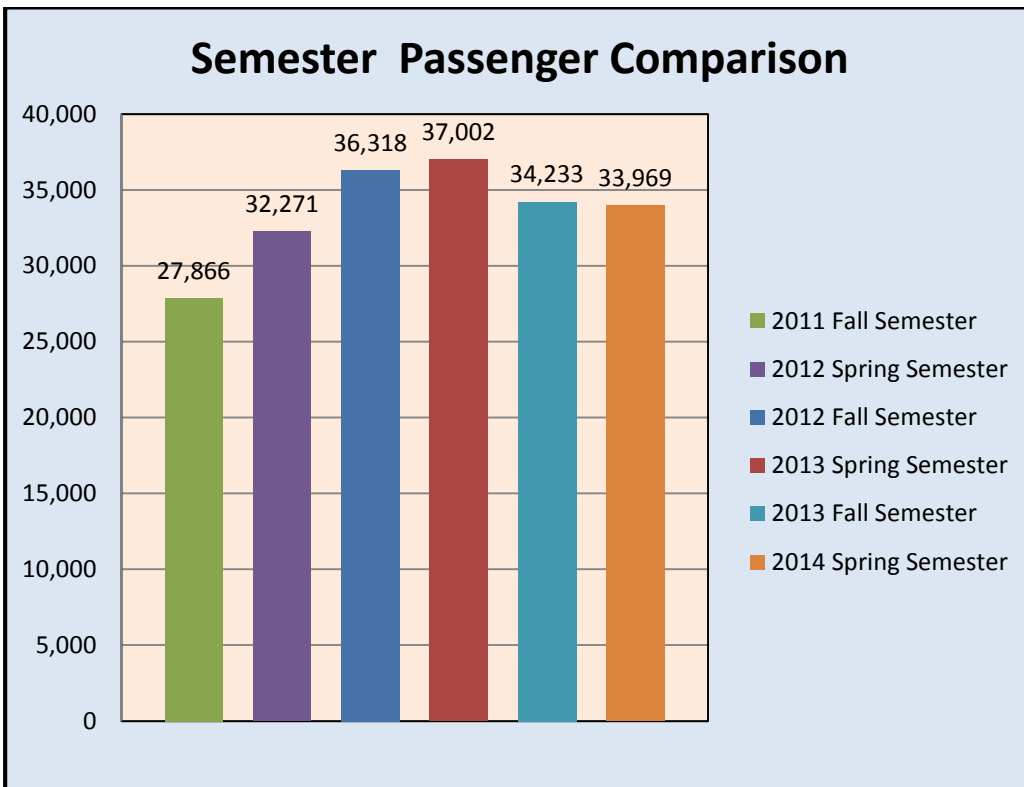
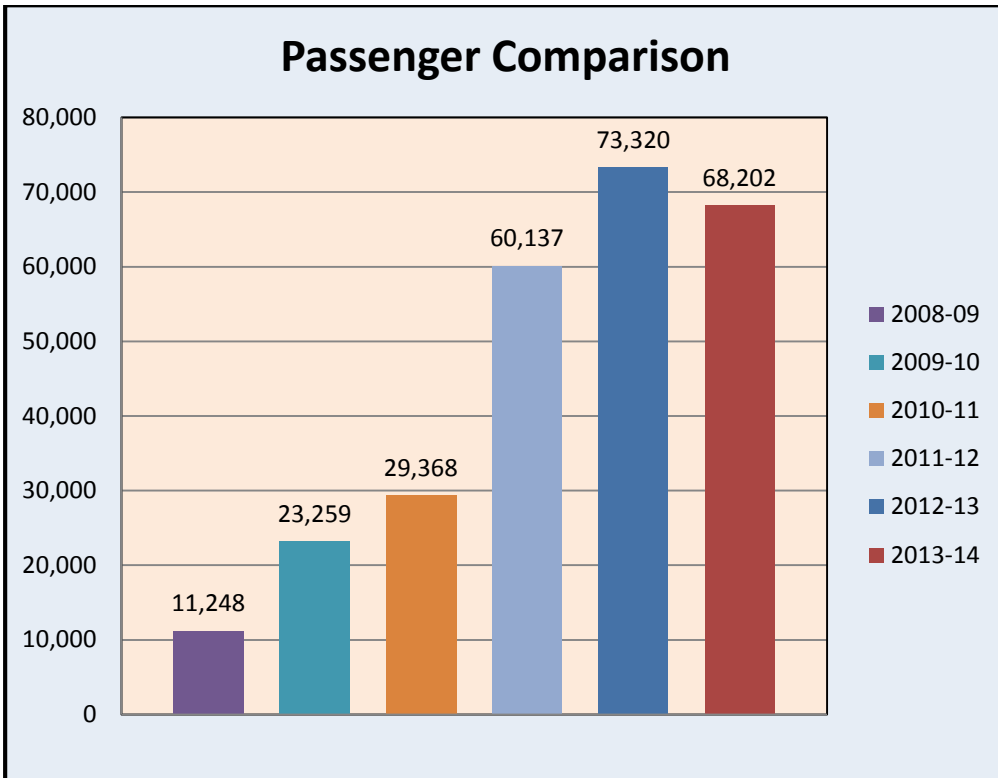
Park and Ride had a decrease in ridership this past year with 68,202 passengers. In 2012-13 we had a record of 73,320 passengers.

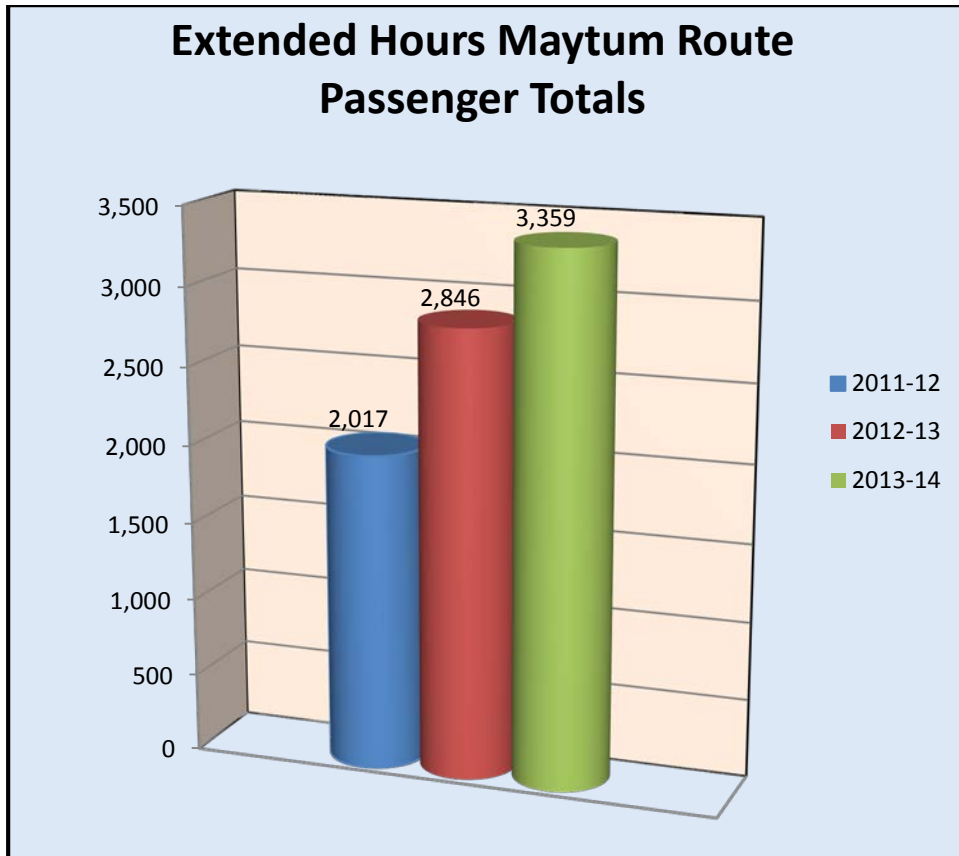
Significant Accomplishments

This was the ninth year that the shuttle service was offered. Over the nine year period we have transported 363,351 passengers. Every year we receive many compliments from students and staff thanking us for this service. The extended hours on the Maytum Hall route supporting evening classes continues to grow in ridership.

Statistical Data

- There were 34,233 passengers serviced for the fall 2013 semester.
- There were 33,969 passengers serviced for the spring 2014 semester.
- A total of 68,202 passengers used the shuttle for 2013-2014.
- A total of 3,359 passengers used the shuttle on the Maytum route from 5:30 pm to 7:30 pm, an increase of 18% from last year.





Assessment Update

Assessment Statement

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

Assessment Activities

Our passenger count for the Maytum Extended Hours Route had increased again this year, as more students, faculty and staff are using this service.

Assessment Goals

- Increase passenger counts.
- Look into expanding the service for special occasions.

Property Control

Annual Report

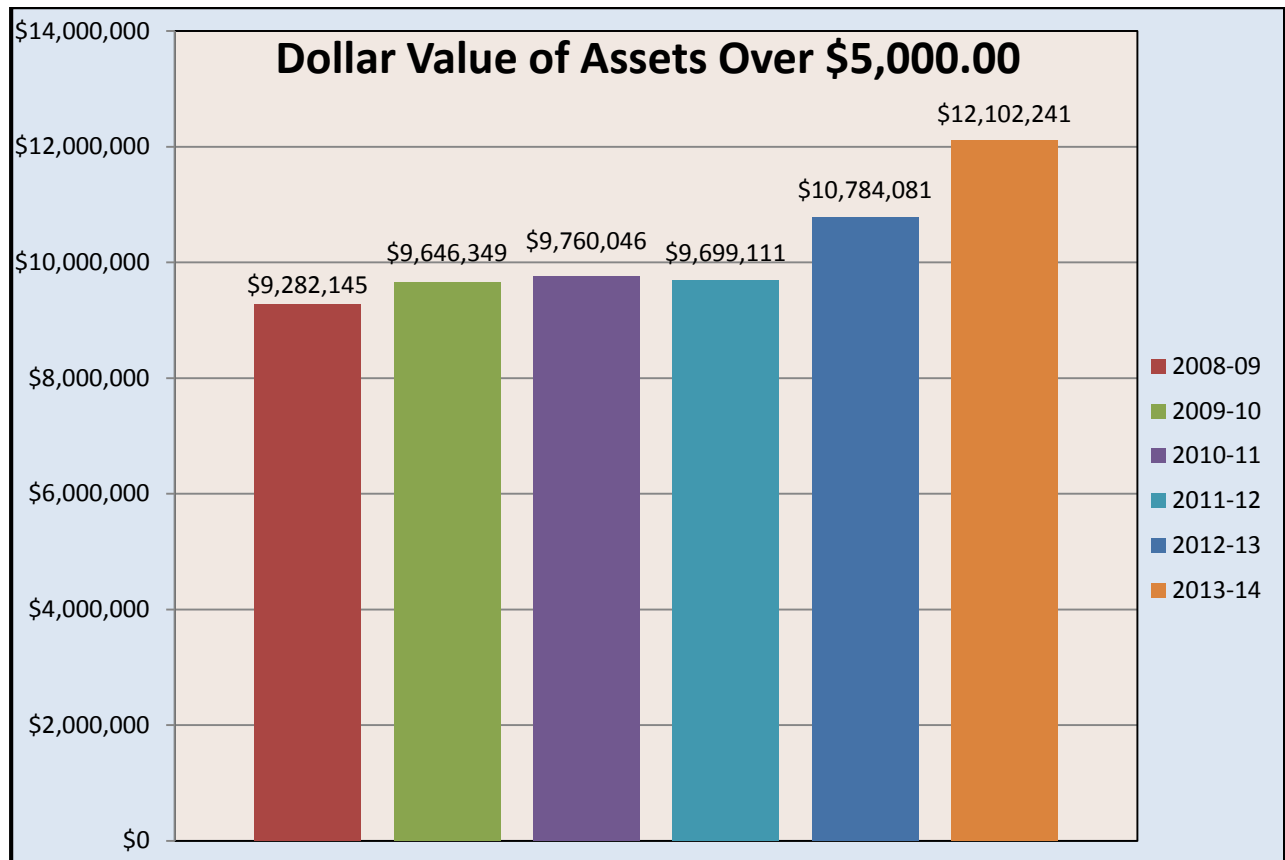
The Property Control Department is responsible for the administrative policies and procedures of both the State University and The Research Foundation for the complete record and physical inventory of all assets of the University. Property Control is also responsible for reporting of all missing assets 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.

The department staff consists of a Calculations Clerk 2 and one student with good working knowledge of Microsoft Access and Excel. During the months of May through August, extra student help is recruited for the physical inventory process.

Significant Accomplishments

- Campus electronics recycling was held in August 2013 and June 2014 at no cost to the campus. The revenue generated from the 21,498 lbs. of electronic equipment was \$4,729.56.
- Assets: 7,400 items totaling \$21,445,547.23.
- Surplus equipment was transferred to other campuses or to OGS for disposal on E-bay.
- Presented at the Administrative Workshop on Property Control.
- Updated campus Property Control Procedures manual.



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 Calculations Clerk 2 retired in October 2013, and the position went unfilled at that point.

Property Control did not complete its annual physical inventory before the retirement of the Calculations Clerk 2, resulting in finding only 72% of the University's assets.

Assessment Goals

- Continual use of SUNY System Administration Property Control software and database.
- Continual asset inventory and reconciliation.
- Update website and Property Control manual.
- Hire and train new Property Control Coordinator.

Telecommunications

Annual Report

Efforts continue to provide quality telephone service to all faculty, staff and students as growth of the campus community continues. The services provided are new telephone line placement, handling of trouble/repair calls, relocation of existing telephone lines on campus, voicemail problems/pass code, operator service, answering questions on events, transferring calls to faculty and staff, and giving directions to the campus.

The department is staffed by University Services.

Significant Accomplishments

- The telephone operator answered calls for fiscal year 2013-2014 were 5,481 on the University's information line; in addition, the operator also handled calls for the University Services lines.
- The department processed 50 work orders consisting of 100 items for new or changed phone service.
- The department processed 140 repair orders.

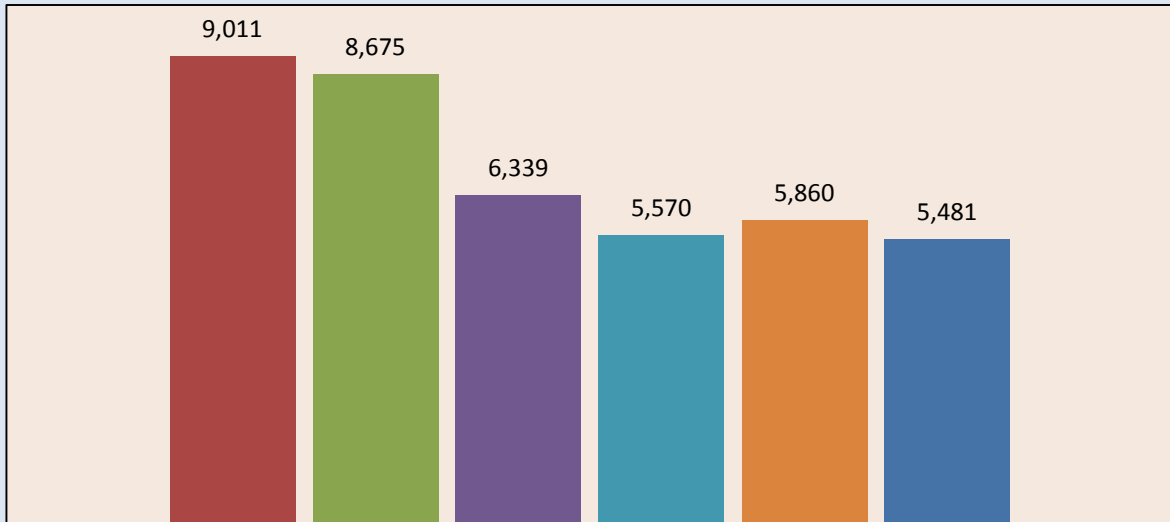
Statistical Data

- Total telecommunications expenditures for fiscal year 2013-2014 were: \$587,576.49
- Verizon Long distance minutes for 2013-2014:

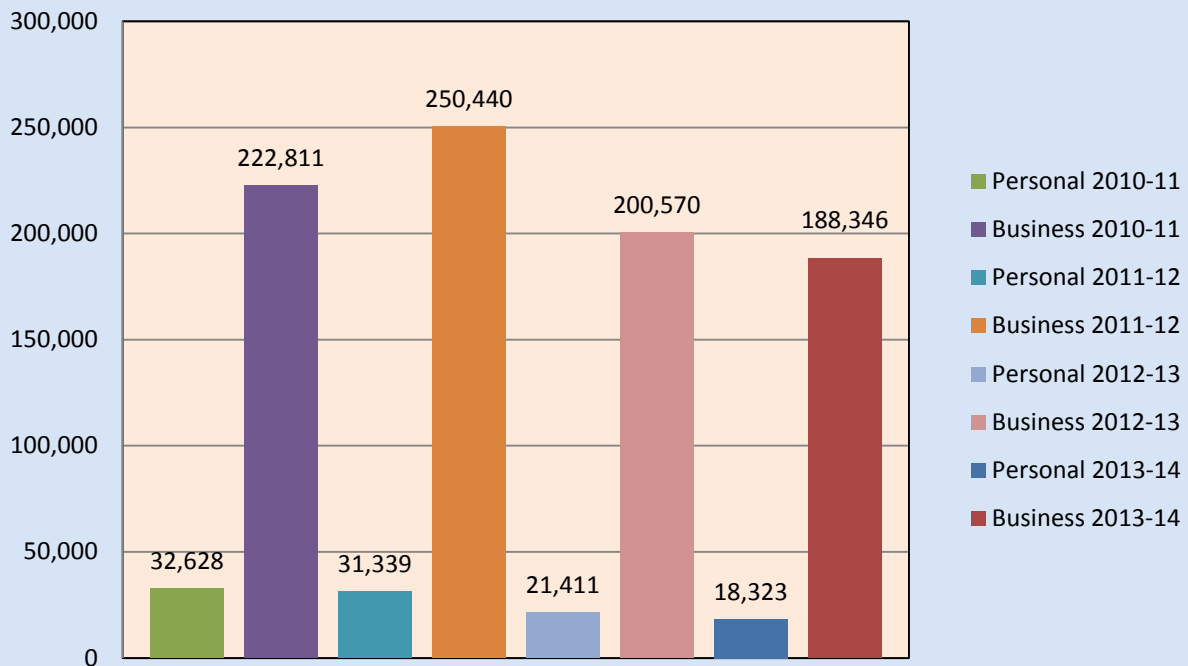
Total long distance minutes - State	188,346
Total long distance minutes - Non State	18,323
Total minutes	206,669

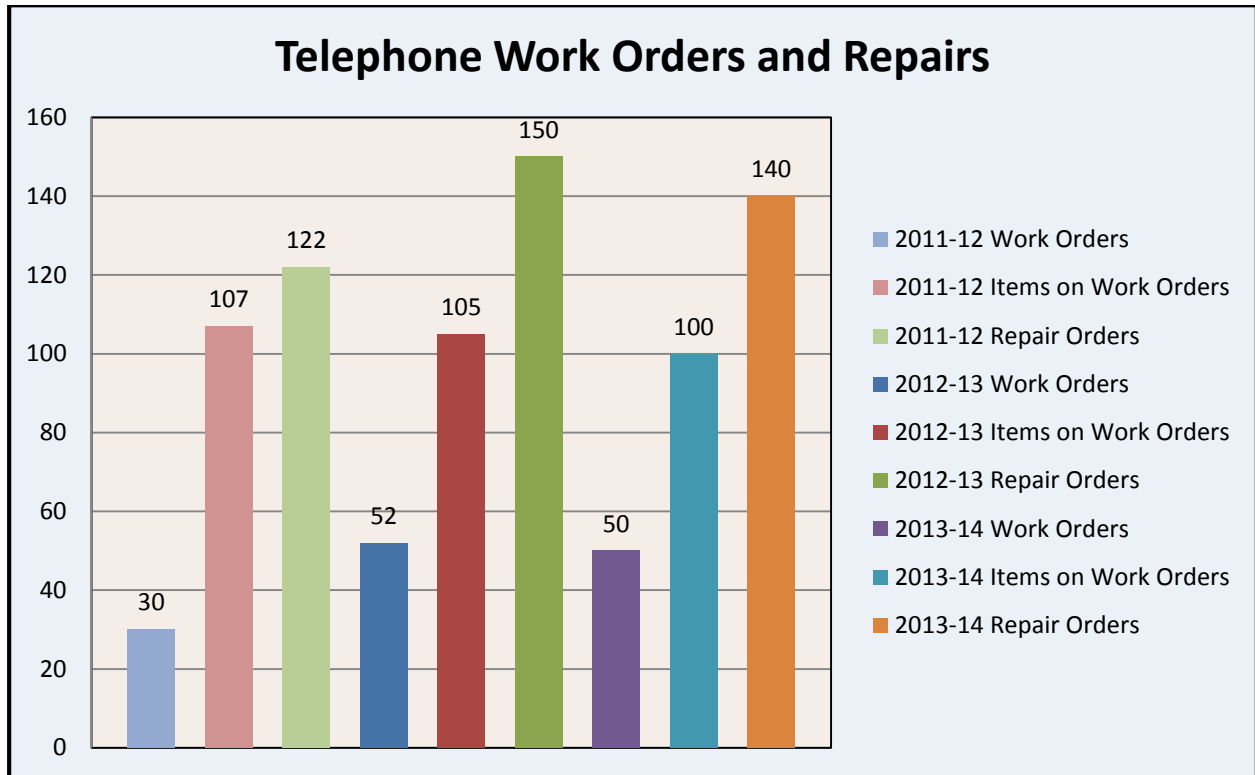
Operator Call Report

2008-2009 2009-2010 2010-2011 2011-2012 2012-2013 2013-2014



Verizon Personal - Business Long Distance Minutes





Assessment Update

Assessment Statement

The Telecommunications unit provides the university with quality telephone service at a reasonable cost.

Assessment Activities

University Services continues to review procedures and look for cost savings opportunities to reduce our telephone expense.

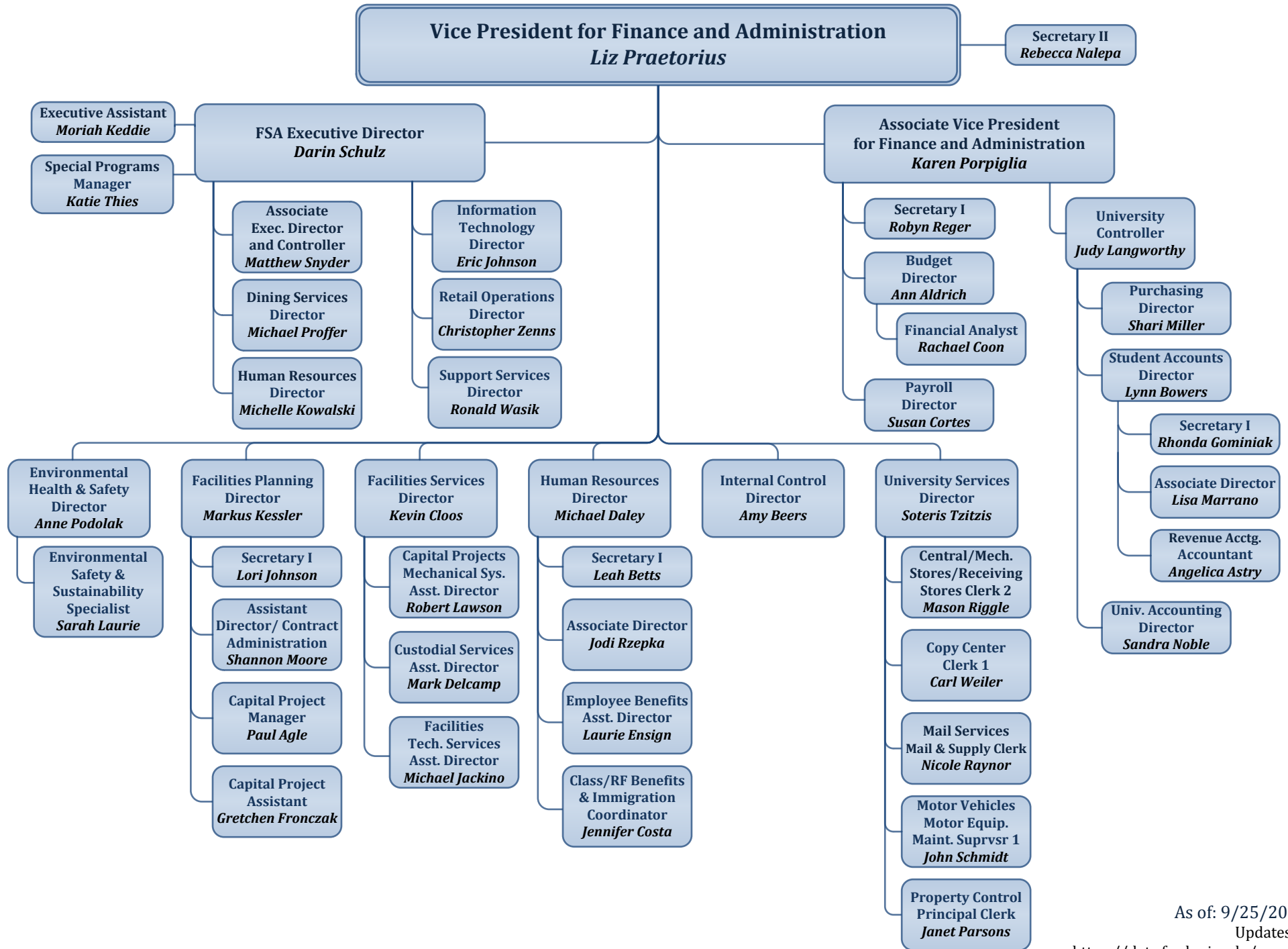
Assessment Goals

- Continue with cost savings opportunities to reduce telephone expenditures.
- Review the cost to go to VOIP.

Appendix A

- **Organizational Chart**

Finance and Administration



Appendix B

- **Fredonia Vision Statement**

The State University of New York at Fredonia

Vision Statement

Fredonia aspires to be a comprehensive, selective, diverse, residential institution that is above all a community of learners. It aims to provide a challenging, safe, and supportive educational environment in which every participant has the flexibility to develop his or her best talents, attaining the highest standards of excellence in liberal arts and in one or more chosen fields. At the center of our curricula is a broad, integrated General College Program that will increasingly emphasize writing, problem-solving, scientific reasoning, a global perspective, and socio-ethical understanding, while introducing students to arts, humanities, mathematics, and natural and social sciences. All specializations build from this core.

Fredonia's faculty will continue to be dedicated teachers and also practicing scholars and performers/artists whose continuous learning animates their teaching. The University both requires and will foster their research, creativity, and other professional service as members of our learning community.

A broad range of liberal arts and professional programs at the undergraduate level and increasing numbers of programs at the master's level will provide a great variety of academic choices. Academic fields which will continue to attract large numbers of students include:

- professionally accredited programs in the fine and performing arts, including nationally renowned and comprehensive programs in music
- nationally recognized programs in elementary and secondary education and speech pathology
- successful programs in the natural sciences, including a unique undergraduate program in recombinant gene technology
- significant programs in psychology and in social sciences with applied and international orientations
- distinctive programs in English, centered on American and world literature, and in communication
- professional programs in business, accounting, and computer science, with a focus on applications of information technology

These academic strengths will increasingly be enhanced by writing across the curriculum, a variety of interdisciplinary programs, the appropriate use of new technologies, and an emphasis on international and multicultural studies.

Our commitment to high standards for our students and to individual learning and development will continue to find expression in a college-wide emphasis on student-centered teaching and advising. The resulting close relationships among students, faculty, and staff will be augmented by ever easier access to faculty outside of class, by an emphasis on joint student/faculty research, and by opportunities for internships and independent studies in all programs. Our Honors Program, which provides unusual intellectual challenges in specially designed courses, will grow in scope. Hallmarks of the University will continue to be genuine collaborative education and exceptional graduation rates.

In a setting of well-maintained buildings and grounds, co-curricular activities and sports will continue to develop leadership and unite participants in the pursuit of shared interests.

Fredonia's professional staff will continue its strong contribution to student development and learning outside of class.

As a community of learners, we must respect both individual and cultural differences. We will strengthen understanding of and respect for others through general education requirements, multicultural courses, academic programs, student activities, and opportunities for study abroad.

Our service to our region will include an increasing range of volunteer services and greater support for the region's economic and educational development. Fredonia also aspires to bring our distinguished cultural programming to wider audiences in our area.

Fredonia believes in its students' ability to excel. They will leave us prepared to think and communicate critically and creatively, to see themselves as self-respecting men and women responsible for the consequences of their choices, engaged with their communities, able to work together with diverse people, and ready to face unpredictable challenges in a rapidly changing world.

Approved by Faculty Council

ACKNOWLEDGEMENTS

CONTRIBUTORS

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Robyn Reger, *Secretary 1*

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Sue Cortes, *Director of Payroll Services*
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Sandy Noble, *Director of University Accounting*

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Michael Jackino, *Assistant Director of Facilities Services – Technical Services*
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Steve Siragusa, *Plumbing Supervisor*
Rich Newton, *Head Grounds Supervisor*
Ray Bogue, *Structural Trades Supervisor*

Faculty Student Association

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Matthew Snyder, *Associate Executive Director of FSA and Controller*
Moriah Keddie, *Executive Assistant*
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Eric Johnson, *Director of Information Technology*
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Christopher Zenns, *Director of Retail Operations*

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Laurie Ensign, *Assistant Director of Human Resources/Coordinator of Employee Benefits*
Jodi Rzepka, *Associate Director of Human Resources*
Leah Betts, *Secretary 1*
Stephanie McMasters, *Clerk 1*
Diane Howard, *Database Consultant*
Susan Murphy, *EAP Coordinator*

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Marketing and Communications

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Patty Herkey, *Communications Designer*
Erin Ehman, *Graphic Designer*

University Services

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Jody Myers, *Keyboard Specialist 1*
Janet Parsons, *Senior Mail and Supply Clerk*
John Schmidt, *Motor Equipment Supervisor*
Mason Riggle, *Stores Clerk 2*
Carl Weiler, *Clerk 1*
Lois Valentine, *Calculations Clerk 2 (retired October 2013)*



ADMINISTRATIVE AWARD WINNERS

2014

Debbie Desmond – Secretarial/Clerical
Matt Snyder – Professional
Herb Farner – Trades
Susanne Valentine – Custodial
Christine Sipp – FSA

2012

Cindy Haase – Secretarial/Clerical
Lynn Bowers – Professional
Larry Pelz – Trades
Gladys Lockett – Custodial
Ron Mirek – FSA

2010

Becky Krzyzanowicz – Secretarial/Clerical
Judy Langworthy – Professional
Joe Fabritius – Trades
Randy Goodemote – Custodial
Terri Helwig – FSA

2008

Denise Aschmann – Secretarial/Clerical
Markus Kessler – Professional
Joel Polito – Trades
Darlene Miller – Custodial
Marcia Mackowiak – FSA

2006

Donna Howlett – Secretarial/Clerical
Laurie Ensign – Professional
Timothy McGraw – Trades
Daniel Pleszewski – Custodial
Lynne Montague – FSA

2004

Mary Jo Rusch – Secretarial/Clerical
Jodi Rzepka – Professional
Paul Agle – Trades
Mary Abers – Custodial
Cheryl Smith – FSA

2013

Lori Johnson – Secretarial/Clerical
Lisa Marrano – Professional
James Kuras – Trades
Jorge Rosa – Custodial
Millie Stanton – FSA

2011

Robyn Reger – Secretarial/Clerical
Bill Michalski – Professional
Paul Siebert – Trades
Sue Smith – Custodial
Pat Wilde – FSA

2009

Lois Valentine – Secretarial/Clerical
Karen Porpiglia – Professional
Steve Siragusa – Trades
Lee Szalkowski – Custodial
John Skubis – FSA

2007

Dana Berry – Secretarial/Clerical
Mike Jackino – Professional
Brent Kawski – Trades
Mary Leckliter – Custodial
Judy Van Vlack – FSA

2005

Karen Begier – Secretarial/Clerical
Lynda Pleszewski – Professional
Daniel Chapman – Trades
Vincenzo Chillemi – Custodial
Linda Willoughby – FSA

2003

Diane Snyder – Secretarial/Clerical
Chuck Notaro – Professional
Darlene Burchett – Trades
Dave Renckens – Custodial
Betty Berkshire – FSA

