

I U SOUTH BEND

ADMINISTRATIVE & FISCAL AFFAIRS

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ANNUAL REPORT  
FOR FISCAL YEAR  
JULY 1, 2002-JUNE 30, 2003

**EXECUTIVE SUMMARY  
FROM THE OFFICE OF VICE CHANCELLOR  
ADMINISTRATIVE AND FISCAL AFFAIRS**

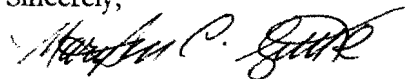
The fiscal year of 2002-03 was a year of "changes" for the Administrative and Fiscal Affairs division. The administrative areas that formerly reported directly to the Chancellor which included Facilities Management, Human Resources and Safety and Security, appropriately joined with the other campus administrative areas allowing for a more coherent organization with increased response time and improved coordination and communication. In addition, several personnel changes occurred including new director appointments. A major system change Human Resources Management System (HRMS PeopleSoft) which affected the human resources and payroll areas and training for the bursar portion of the Student Information System (SIS PeopleSoft) was also implemented. The trustee mandated Auxiliary Strategic Initiative began in the later part of the fiscal year.

All three of the division's major functional areas which include Administrative Services, Auxiliary and Support Services and Business and Fiscal Services experienced new director appointments. Within the Administrative Services area the Director of Human Resources (John Hundley) and Director of Safety and Security (Martin Gersey) joined the team. In addition, the facilities services' director role was assumed by the divisional Vice Chancellor due to the director's leave of absence. The director returned during the later part of the year on a part time basis to assist the Vice Chancellor with construction/renovation and special projects (Randy Landsberg). In the Auxiliary area a Director of Auxiliary Accounting and Support Services (Karen Vargo) was appointed. The Business and Fiscal area experienced two Director appointments, Director of Purchasing and Contracts (Debbie Richards) and Director of Budget Planning and Accounting Services (Donna Broadstreet).

During the year the divisional directors continued to assess processes, set goals and train their staff in customer service skills in order to provide the highest quality service to all of our internal and external users. This may have involved eliminating non-value added steps in a process in order to reduce processing time and costs. At the same time, however the directors had to be cognizant of our need to balance user satisfaction with our responsibility of complying with regulations, protecting against risk, guaranteeing integrity of information and maintaining ethical practices.

The following pages of the annual report provide an overview by area of the major services provided, staff, and accomplishments and challenges within the Administrative and Fiscal Affairs division for the fiscal year July 1, 2002-June 30, 2003. Please note a commitment to the campus priorities in each of the areas. This commitment allows the division to continue to excel in support of the mission of IU South Bend.

Sincerely,



Mary Ann C. Zemke CPA, MBA  
Vice Chancellor Administrative and Fiscal Affairs  
October 1, 2003

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## MISSION

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Support the University educational, research and public service missions. Collect and disburse funds, process accounting transactions, procure and sell goods and services, provide clean, healthy and safe environment, and provide comprehensive human resources services. We accomplish this with the highest of ethical standards accompanied by professionalism, friendliness, efficiency, accuracy, teamwork and effective communication.

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## AREAS OF RESPONSIBILITY

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The Administrative & Fiscal Affairs Division includes three major areas Administrative Services, Auxiliary and Support Services and Business and Fiscal Services. Administrative Services include facilities management, human resources, environmental, health and safety, security and risk management. The Auxiliary and Support Services include auxiliary accounting, support services and auxiliary and service centers. Business and Fiscal Services include purchasing, contracts, accounting transactions, bursar services, cash management, budget planning, internal reviews and financial and cost analysis. (*See areas of responsibility chart on appendix A-1*) Director responsibility may cross over the three major areas. (*See organization chart on appendix A-2*)

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## CAMPUS PRIORITIES

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Foster student learning, access and success: An emphasis on continuous improvement in our services provides directly for and on behalf of students and has assisted the division in attaining quality student services in an efficient and cost effective manner. Books required for classes are purchased in an efficient and timely basis. Our bookstore has increased the number of books bought back from students at the end of each semester resulting in more used books available at a lower cost. Our custodial, maintenance and grounds areas provide a comfortable, clean and safe environment for our students. They also serve as ambassadors for our campus many times being the first contact with prospective and or first time students. Safety & security provides a secure campus environment and access to safe and well maintained parking areas. The bursar area provides services to assist with student tuition and fee payments such as book vouchers for our financial aid students, alternative payment plans, and credit card payments. The Copy Center assists students by providing access to duplicating and finishing services. Housing provides for the needs of our international students and athletes' housing needs. Many of the division's areas such as Bookstore, Dining Services, Safety and Security and Facilities employ students on an hourly basis. By providing a source of income for students on campus we greatly contribute to the retention success.

Encourage and maintain academic success: Administrative and Fiscal Affairs contributes directly and indirectly to supporting academic success. Human Resources intervenes on behalf of a faculty member regarding insurance claims thus allowing faculty to focus on the mission of teaching, research and community service rather than spending time to research a claim problem. The bookstore arranges acquisition of books with publishing sources rather than leaving this

time consuming responsibility to the instructor. Procurement and vendor payments are handled by the purchasing and accounting areas freeing up time for the faculty to pursue their mission. The custodial staff clean the faculty offices, classrooms, laboratories and restrooms; maintenance staff fix and maintain scientific equipment. Security provides time saving conveniences for faculty and students such as escort services, lock out and battery jump starts as well as a sense of security (low crime rate) so faculty and students can concentrate on their activities. Dining Services provides refreshments that allow faculty and students to remain on campus for a meal increasing the potential for faculty-student interaction and collaboration. Many of our staff share their expertise by teaching courses as associate faculty, conducting in class presentations and providing faculty with expert advice that can be incorporated in their instruction.

Strengthen partnerships with the community: The purchasing and contract services underutilized vendor development initiative has resulted in appointments and an officer position on the Minority and Women Business Development board which is a part of the Chamber of Commerce. This has allowed purchasing to partner with vendors and other local schools to provide programs that reach out to minority and women businesses. In addition, we host annually one of the board and vendor meetings. Purchasing also counsels underutilized vendors who may not have been awarded a bid by critiquing their submitted bid and providing advice that may assist them with a stronger proposal for the next time they respond to a proposal. Continuous improvements in streamlining procedures and cross training staff have allowed the accounts payable area to pay vendors in a timelier manner. Also the introduction of procurement cards and ACH payments provides faster payment with vendors. This results in better pricing for the campus, willingness of the vendors to provide additional and larger discounts and, more importantly, an improved image in the community. Human Resource office provides one hundred community organizations with employment listings. In addition, the office participates in the annual community job fair at Ivy Tech. The custodial area employs mentally challenged staff on an hourly basis from Logan Center. Safety and Security have created programs and strategies in an attempt to develop the partnership of campus and community. Examples of such programs include involvement in the campus Neighborhood Watch Program and the neighborhood patrol initiative. By working with outside agencies like the South Bend Police department to help provide services to our neighbors we are taking steps to support campus priorities. The maintenance area conducted wood working demonstrations and work shop for Girl Scouts. The director of Human Resources began attending meetings of and joined the Rotary Club of South Bend. He also serves on the Board of The Council for the Advancement of Labor Management Relations (CALMR) and the Goodwill Business Advisory Council and conducted several mock interviews for Goodwill. He also performs the bookkeeping for contributions to IU South Bend's Fall United Way campaign.

Enhance diversity in the curriculum, in the classroom and on campus: Human Resources is sensitive to diversity in hiring practices and follows affirmative action practices. Diversity is also required in the composition of the search and screen committees for professional and bi-weekly searches. Housing management is sensitive to the needs of the diverse international and regional students that lease our houses. The housing program assigns roommates in the houses from different and diverse backgrounds. Dining Services and the Bookstore employ students for hourly positions from diverse cultures and backgrounds.

Reflect and expand a global perspective: Housing supports and provides for the needs of our international students. Our bursar office has been trained in facilitating currency exchanges for our international students in order to serve them more effectively.

Heighten recognition of IUSB's resources and achievements beyond campus: Purchasing abides by a written "code of ethics" in dealing with our campus vendors. Also the division staff follows the campus and divisional parameters of engagement when associating with the outside community. All of the divisional staff is expected and required to conduct themselves with the highest of integrity and respect in any and all relationships inside or outside of the campus. Many staff volunteer their time to community groups by offering their expertise to do an unpaid presentation, and volunteering their skills for organizations such as Habitat for Humanity. Some of the staff while representing the campus have been published in professional publications.

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## PARAMETERS OF ENGAGEMENT

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During the fiscal year the directors in the division of Administrative and Fiscal Affairs developed the divisional parameters of engagement. The parameters provide the "how to work with each other" guidelines for the Vice Chancellor and Directors. (*See organization chart on appendix A-3*) In addition, each major service area was encouraged to develop departmental parameters of engagement.

The following is a list of the Administrative and Fiscal Affairs' Parameters of Engagement for the Directors and Vice Chancellor:

- Accountability
- Calculated risks
- Creative Thinking
- Evaluate risk/take
- Fairness
- Flexibility
- Focus on Problem not person
- Honesty
- Humor
- Listen
- Open to different points of views
- Patience
- Respect
- Responsiveness
- Support
- Teamwork
- Trustworthy
- Understanding interest win-win solution

# ADMINISTRATIVE SERVICES

## FACILITIES MANAGEMENT

(Submissions from Randy Landsberg, Carl DeBruyn, Carl Stetler & Marjorie Andert)

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### SERVICES

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Facilities is charged with the responsibility of operating and maintaining 1,232,015 gross square feet of campus buildings (*See GSF of buildings on appendix B*) including 945,444 gross square feet of educational and administrative buildings (excludes 6,679 square feet of leased space in Elkhart), 220,535 gross square feet for parking garage and 66,036 square feet of student houses. There are also forty five (45) acres of grounds on the main campus and twenty-six (26) unimproved acres located immediately across the St. Joseph river (Playland). Planned, preventive and emergency building repairs, building renovations and energy management is performed by the maintenance area. Cleaning the interior areas of the campus buildings, trash removal, collection of recyclables and assisting with entryway snow removal is performed by the custodial area. Maintaining lawns, shrubs and flower beds for the main campus and general mowing for the property south of the St. Joseph river and snow removal is the responsibility of the grounds area. In addition, facilities management works with the university architect's office to coordinate and plan campus renovation and construction projects, including preparation of specifications for bid requests and review of submitted bids.

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### STAFF

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Effective in November, 2002, facilities management department began reporting to the Vice Chancellor for Administrative and Fiscal Affairs. Due to the director's leave of absence and subsequent part time return to assist the Vice Chancellor with construction /renovation and special projects, the Vice Chancellor assumed the director's role for facilities management. This role will continue into the 2003-04 fiscal year.

The maintenance area includes thirteen staff of which twelve are dedicated to the educational, administrative and recreational buildings and one is dedicated to student housing. The maintenance staff includes specialists in the areas of heating and air conditioning (HAVAC), energy management, electronics, carpentry and lock smithing. The grounds area includes five staff and one working supervisor. Both the maintenance and grounds areas have one manager. The staff may begin their winter work day at 2:00 AM to provide clean and safe walkways for staff and students arriving to campus at 8:00 AM. The custodial area has twenty-nine custodians, two general supervisors and one manager. Many of the custodian staff begin their day at 4:00AM. (*See organization chart on appendix A-4*)

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### ACCOMPLISHMENTS AND CHALLENGES

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Maintenance: The staff of the maintenance area in addition to performing various routine preventive and emergency repairs also completed several renovations projects. The projects included completion of the biology laboratory, Northside West painting of public spaces,

upgrading offices in administration for planned moves, renovating additional x-ray space for dental program and installing additional dental chairs, providing water, drain and electrical services for dental program. Began renovation of Informatics program in Northside West. Also constructed and installed the peace pole dedicated at the one year anniversary of 9/11.

Maintenance projects outsourced included replacing Northside building chillers, rebuilding of Library chiller (air conditioning), rebuilding boilers (heating) for the Administration, Associate and Northside East buildings, repairing hot water supply from Northside boiler room to Northside West building, rebuilding main entrance of Riverside to comply with ADA requirements.

Custodial Services: The staff of custodial services in addition to performing routine housekeeping responsibilities also cleaned, stripped and waxed all hard tile flooring, and shampooed carpets during the two major semester breaks. The staff also managed a successful recycling effort on campus. The custodians also responded to special requests and events that were held on campus including serving food and cleaning up dishes. An up grade in equipment from manual to automatic including riding machines helped ease the physical effort required by an aging work force and at the same time reduced the time needed to complete a job. The department also improved the absenteeism problem that has been plaguing the area and continues to address the problem. The area also reduced the number of chemicals that were being used and when possible have switched to environmentally friendly products.

Grounds: The staff of the grounds area continued to maintain our attractive landscaped grounds. The grounds crew also completed last minute landscaping of the area surrounding the fountain for the dedication ceremony. They also provided maintenance for the parking lots including re-stripping many of the lots.

Facility Projects: The Crossroads fountain on the campus mall was completed. The staff assisted the contractor with the fountain construction and met the dedication date deadline. Plans for the renovation of Administration Building and the proposed renovation plan for the Associates Building were completed.

## **HUMAN RESOURCES**

(Submission from John Hundley)

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### **SERVICES**

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Human Resources services includes employment services for staff positions, staff classification and compensation, faculty and staff benefits administration, staff orientation and training programs, IU staff personnel policy administration, employee relations with AFSCME Local 1477-01 and staff councils, employment law compliance, maintenance of staff personnel files, records, and databases, preparation of personnel reports, analyses, and research. The department also provides consulting for Human Resources issues.

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### **STAFF**

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Effective in November, 2002, the Human Resources department began reporting to the Vice Chancellor for Administrative and Fiscal Affairs. The Human Resources office has a staff of



three full-time and one part-time, hourly employee. The office is headed by a director. Reporting to the director are an employee benefits counselor and human resources representative. A 20-hour per week part-time hourly clerical assistant reports to the employee benefits counselor and the human resources specialist. (See organization chart on appendix A-5)

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## ACCOMPLISHMENTS AND CHALLENGES

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Employment: There were 46 appointed staff hires during the 2002-2003 fiscal year. (21 CL, 5 SM, 1 GS, and 19 PA), 4 of whom (8.7%) were minority group members. Average candidate pools during the 2002-2003 fiscal year were as follows: CL = 20.1; SM = 42.2; and PA = 36.8 candidates. In addition, there were 9 part-time, hourly employees through Human Resources, 1 was a minority group member (11.1%). Candidate pools for part-time, hourly positions averaged 16.8 candidates.

The number of interim/acting appointments declined dramatically throughout the fiscal year to the point where this should no longer be an issue. Back-up coverage was provided to the Affirmative Action office on at least six occasions during the fiscal year. The "Authority to Recruit" memoranda and the Professional Staff Search and Screen Guidelines were updated. These revised guidelines include a new policy of staff official employment offer letters being sent by Human Resources. Approximately, \$23,394 was spent for advertising costs which included an average of \$409 for a professional ad, \$264 for a clerical ad, \$257 for a service maintenance ad and \$226 for part-time hourly ad. We analyzed the cost implications of an early version of new background check procedures for appointed staff and certain part-time, hourly positions that are scheduled to take effect later in the 2003-2004 fiscal year.

Compensation: The Job Evaluation Committee met 13 times and evaluated 29 new or revised PDQs. The exempt status under FLSA of several proposed positions was reviewed before submission of PDQs to the Job Evaluation Committee. Data were reported to the following salary surveys: CUPA Administrative Compensation; CUPA Mid-Level Administrative/Professional; Project Future; Bureau of Business & Legal Reports; and Notre Dame Michiana Regional Survey. 2003-2004 market references were computed for clerical/technical and professional staff. Across-the-board increases of 2% were computed for biweekly and professional staff for use in budget construction.

Performance Management: We offered 14 performance management training sessions in July, 2002 and 2 make-up sessions in August, 2002. Memoranda were sent to supervisors of clerical/technical and professional staff requesting that performance evaluation forms be completed by January 1, 2003 and reviewed by February 1, 2003. We wrote report of performance evaluations received as of February 1, 2003 indicating that only thirty-three had been received. At the end of the fiscal year fifty-nine evaluations remained to be submitted. We tracked receipt of 2002 performance evaluation forms for the remainder of this fiscal year. The slow response by supervisors in completing the performance review forms represents a continuing challenge.

Employee Relations: Seven (7) labor-management meetings with AFSCME Local 1477-01 were held during the fiscal year. We met with the union to review changes in the SM Personnel Policy Manual due to implementation of PeopleSoft and HRMS and then distributed revised manuals. A two-year language agreement was negotiated with AFSCME Local 1477-01 and ratified by the union membership. (See agreement on appendix C) A new attendance program was

included in the agreement to replace the May 1, 1996 letter of understanding regarding absenteeism. Two stage III grievances were resolved. We updated and reprinted the biweekly and professional staff handbooks. We met with the Professional Staff Council and responded to several of their concerns. We invited staff to attend breakfasts with Chancellor Reck. We processed a number of FMLA leaves and unemployment compensation claims. We counseled a number of supervisors about corrective action and responded to two requests under the Indiana Access to Public Records law. We assisted in implementing Risk Management's policy on motor vehicle checks. Staff Appreciation Day was scheduled for July 25, 2003.

PeopleSoft/HRMS: We reviewed a number of spreadsheets for conversion of HRIS (Human Resources Information System) data into PeopleSoft/HRMS (Human Resources Management System). The new PeopleSoft/HRMS was successfully implemented December 1, 2002. Human Resources assumed responsibility for position management changes in PeopleSoft and the processing of part-time, hourly staff transactions previously performed in the Budget Office and Payroll. Because PeopleSoft is more complex and data intensive than HRIS, our work load and stress level have increased significantly. We trained 80 e-doc initiators in processing staff e-docs and assisted the Faculty Records Coordinator in Academic Affairs, in training academic e-doc initiators. An additional 5 replacement e-doc initiators were trained throughout the year. A continuing challenge is the errors made by some e-doc initiators. We are entering a high volume of transaction with a minimum of errors (as we have caught and corrected most of the errors made by the e-doc initiators). We developed several reports in IUIE (Indiana University Information Environment). We coordinated entry of changes in HRMS to facilitate budget construction and budget load corrections. We processed 303 hourly terminations and 172 hourly pay increases from payroll "red dot" reports (work previously performed in payroll). Implementation of the e-doc routing and save functionality has been delayed until October 11, 2003. We have finalized several of the level 2 e-doc routing requirements and most of the level 1 and level 3 e-doc routing requirements.

Personnel Records and Reports: We replaced staff "Personal Data Forms", which were removed from the personnel files, with form ED. We converted personnel and benefit files from social security number to employee ID number identification. We updated home addresses and employee ID numbers for our salary histories. We compiled a list of probationary employees for budget construction.

Benefits Administration: We coordinated open enrollment meetings on campus during November, 2002. We verified the accuracy of open enrollment entries made by UHRS (University Human Resources Services) and contacted employees whose dependents were dropped as a result on not submitting required student verification. We scheduled a large number of individual retirement planning sessions with representatives of TIAA-CREF and Fidelity. Faculty and staff were notified of the decision by Partners Health Plan to go out of business in 2004. Benefit enrollment materials are now generated by PeopleSoft/HRMS as various transactions are entered. We convinced UHRS to add two zip codes to the M-Plan zip code table. HRMS has complicated processing enrollment changes, as we must now request that the file be opened and then wait for this to occur before the change can be processed. We coordinated the continuation of benefits coverage during the summer for returning visiting faculty with Academic Affairs. As "health plan representatives", the Human Resources staff completed HIPAA (Health Insurance Portability and Accountability Act) compliance training. We verified spouse and dependent child 2003-2004 academic year fee courtesy eligibility in accordance with new internal auditing guidelines. We audited 2002 PA staff PTO cards and resolved two overutilization problems. We recently resolved a problem of overutilization of 2003

PTO (Paid Time Off) by a terminating employee. We sent letters to 14 biweekly staff employees whose adjusted hire dates affected their paid-time-off benefit accruals.

Training: A PowerPoint presentation of the compliance training session on workers compensation was developed and placed on the W: shared drive. The May, 2003 FMLA compliance training session was attended by 12 supervisors. We initiated new account manager and new administrative secretary checklist of individual tutorial sessions. We developed and offered a "Selection for High performance" workshop. We offered a workshop on the basics of Medicare conducted by the Indiana Senior Health Insurance Information Program. Three new employee orientation sessions were conducted during the fiscal year.

Departmental Administration: The layout of the Human Resources office was changed, with human resources representative moving into the former application room and an applicant area created in her former space. This helps reduce interruptions and protect confidentiality of data while providing room for more applicants. The Human Resources staff job specific expectations were updated for the 2003 calendar year.

## **SAFETY & SECURITY**

(Submission from Martin Gersey & Dennis Nicodemus)

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### **SERVICES**

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Our security related activities focus on structured procedures designed to minimize the potential for loss. Activities include but are not limited to building lock down procedures and procedures for handling building occupants after hours, disseminating information relating to crime prevention, maintaining access control, and assessment and implementation of loss prevention strategies. Public safety issues are approached through a number of avenues with an emphasis on training and education, and proactive preventive activities. (*See responsibility chart on appendix D*)

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### **STAFF**

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The authorized strength of the Safety and Security department consists of the following full time staff: one director, two security police supervisors, one campus environmental health & safety manager, seven police officers,<sup>1</sup> and three security officers. Our department is the only University department that operates 24 hours a day every day of the year. In order to maintain a presence on campus with around-the-clock protection, our full time police and security officers are currently supplemented by eight part time security officers, six of whom are IU South Bend students, and three part time police officers. (*See organization chart on appendix A-6*)

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<sup>1</sup> The department director and supervisors are also Indiana certified police officers.

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## ACCOMPLISHMENTS AND CHALLENGES

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Expansion of crime prevention programs: We have continued to emphasize our crime prevention effort on campus. This has been done by assigning Crime Prevention and Public Relations activities on a voluntary basis. This officer is given special assignments to address crime prevention issues and to contribute to campus initiatives. Crime prevention activities include the development of registration programs for bicycles and for laptop computers, conducting neighborhood watch meetings, providing safety talks for our campus Children Center, and attending a number of campus events to promote personal safety.

Complete the initial update of department policies & procedures: Given the nature of the work we do in our department having policies and procedures that are committed to writing is very important. For this reason we are in the process of updating our department policies and procedures manual. This has been a time consuming process, and we would like to have a draft of our manual prepared during the first half of the 2003-04 academic year.

Develop strategies to address property crimes on campus: We have a safe campus. This statement is supported by the crime statistics which are documented on an annual basis. Our most serious crime problem in terms of the frequency with which it occurs are thefts. We have noticed an increase in the number of thefts, particularly from vehicles in our parking lots, over the last 2-3 years. We have developed tactical responses (e.g., extra-duty patrols) in an attempt to curb these incidents. We have also utilized other crime prevention programs such as our door tag program (tagging open unattended office doors) to remind others of their importance in maintaining a safe and secure campus.

Initiate a smoke detector testing and maintenance program: We submitted, and were granted one time funding to purchase the equipment needed for this program. Our next step will be to arrange for training at one of our sister campuses in how to carry out the testing. Our program will then be implemented under the guidance of our EH&S manager.

Initiate the development of a written campus confined space program: We have obtained training materials needed for this program. Our EH&S manager has also identified permit required confine spaces, and is working with Indiana University personnel at IU Bloomington to identify non-permit required confine spaces. We will have to purchase signage and possibly an oxygen monitor in order to implement this program.

Continue work toward achieving storm water compliance: This is a huge program required by recent federal legislation. Our EH&S manager has been busy working with local, state and university personnel in order to implement this program for our campus. Those efforts include identification of all storm water outfalls on campus; identification of locations that require further testing in order to determine if storm water is draining into the combine sewer; working with the local committee (City of South Bend, St. Joe County, Mishawaka, Ivy Tech, Bethel, etc.) to develop educational materials for storm water compliance; working with South Bend to combine resources on best management practices; working on an agreement for South Bend to have temporary access to conduct repairs on main storm water outfall; and notifying the Vice Chancellor for Administrative and Fiscal Affairs of the potential budgetary impact for implementation of this program.

Training: Training is crucial to the performance of the safety and security department. Our police officers are required to attain a minimum of 16 in-service training hours each year in order to maintain their police certification. Our officers who are certified Emergency Medical Technicians are required to attain 40 hours of in-service training annually. If they are also a police officer, this is in addition to their police in-service requirements. Our Environmental Health & Safety Manager must maintain certifications in various areas. We encourage officers to attend training that is relevant to their job responsibilities. However, training is expensive, and we try to control costs by utilizing local training providers, and by maintaining a number of certified trainers on our department. For the size of our department we excel in this area by maintaining four certified police trainers and three Red Cross certified EMS trainers. We also provide training to other university department personnel.

This academic year we provided over 247 hours of training to our department personnel. We provided 20 training courses in cardio-pulmonary resuscitation & automatic external defibrillator for the professional rescuer, standard first aid and adult, child and infant CPR. We also trained nearly 250 employees in an array of environmental & health programs. *(See training list on appendix E)*

As mentioned, the safety and security department is involved in a wide-array of activities. Most people probably do not realize that we make over 18,000 checks on our alarm systems annually, or that we conduct over 7,500 building security checks a year, or that we provided 149 personal escorts, helped 140 people start their vehicles, and unlocked 118 vehicles for folks last calendar year.

Environmental health & safety activities included over 750 inspections, testing procedures and responses to EH&S issues of concern. Activities included the review, development, revision and implementation of a dozen environmental & health programs. *(See list on appendix E)*

Challenges: Overall challenges of the safety and security department emanate from the dynamics of our job responsibility where outcomes can have very serious consequences; in maintaining good physical and personal security in the open environment of a state supported university; in dealing with extremely sensitive issues where protecting individual rights is paramount; in resolving problems that involve points of view that are often widely divergent; in dealing with complex situations that have no clearly defined answers; and in maintaining a small department with broad-based responsibility operating around-the-clock.

Other challenges for the security and police include maintaining a collegial relationship with our campus constituents while at the same time meeting our responsibility of enforcing rules with which others may not agree; providing information concerning a wide range of legal and technical matters with a small number of staff; and maintaining a minimum level of expertise in order to handle our responsibilities in a timely manner.

Addressing crime on campus is an important function of the campus police department. Fortunately, our campus is relatively free of crime. However, we are a public supported university and we deny no one access to our campus environment. Unfortunately, some visitors to our campus have ill intentions. This academic year we had one serious crime occur on campus when a female student was attacked in the library tunnel. We also had 7 burglaries, 4 motor vehicle thefts, 71 larcenies or thefts, and 13 vandalisms reported to our department. This is an increase from last year when we had 5 burglaries, 1 motor vehicle theft and 71 larcenies or thefts.

Vandalisms are down at this time from a total of 32 last year. These statistics emphasizes the importance of maintaining vigilance and high visibility on campus.

# AUXILIARY & SUPPORT SERVICES

## AUXILIARY ACCOUNTING

(Submission from Karen Vargo)

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### SERVICES

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The purpose of Auxiliary Accounting Services is to provide financial support to I U South Bend Auxiliary and Service operations. They include Parking, Bookstore, Dining Services, Houses & Rentals, Learning Resource Center, Telecommunications, Associates Building, Child Development Center, Student Activities Center, Campus Events and Continuing Education. Services provided include preparing accrual entries, preparing monthly accrual financial reports, monitoring inventories, preparing cash receipts, internal billings, external billings and service billings

Auxiliary Accounting Services works with Facilities Management to monitor repair and rehabilitation projects to ensure that projects are within budget and that funds are transferred in to cover the current expenditures. Services include monitoring project accounts, preparing budget realignment entries and maintaining various spreadsheets.

Auxiliary Accounting Services also handles campus non-student accounts receivables, cash handling processes, custodial funds, audit reviews, campus FIS and FDRS training, revenue producing accounts, accounts payable for all utilities, cell phone and shipping bills, disbursement vouchers, and IU Foundation gift deposits and check requests. Services include processing accounts receivable lockbox, monitor negative cash accounts, monitor outstanding accounts receivables and run weekly unapproved document report.

The Director of Auxiliary Accounting Services is the Fiscal Officer of the Auxiliary accounts, Facilities accounts, Agency funds and non-designated funds. The Director is also the supervisor on all of the IU Foundation accounts. Services include preparing deposits for IU foundation accounts and reviewing and processing foundation disbursement requests.

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### STAFF

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Auxiliary Accounting Services is comprised of four (4) employees: three (3) Auxiliary Accountants and the Director.

In fiscal year 2003, two (2) of the Auxiliary Accountant positions were filled by internal candidates. The third Auxiliary Accountant position began in August 2003. (*See organizational chart on appendix A-7*)

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## ACCOMPLISHMENTS AND CHALLENGES

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- Met department goal for providing month-end financial reports three weeks after month-end.
- The director assumed the responsibilities of Director of Accounting Services duties from June, 2002-mid November, 2002. For the period of September, 2003-at least December, 2003 the director will also be assuming the accounting transaction functions of accounts payable and related accounting transactions on a temporary basis.
- Began the trustee mandated Auxiliary Strategic Initiative for the campus auxiliaries including housing, bookstore, telecommunications and dining services. The campus director serves on the University wide committee representing other regional campuses. The initiative includes using a management tool called balance scorecard. This is a management tool that translates strategies into a set of related performance measures that assess progress toward attaining strategic objectives.
- Assisted in the development and implementation of Bookstore accounting procedures that have been recognized and promoted by University Administration Auxiliary Services.
- Assisted in the development and preparation of a template for annual reporting of Parking and Housing operations.
- Worked with respective unit directors to provide financial information and reports for the improvement of their business operations.
- Consulted with Northwest Campus Bookstore to implement IUSB Bookstore accounting procedures and modified where necessary because of more MBS POS modules used and cleaned up balance sheet balances.
- Centralized Auxiliary accounting processes to enable the majority of accounting functions to be done in one office.
- Centralized IU Foundation accounting functions. All gift deposits and check requests are sent to auxiliary accounting office, verified and processed, and forwarded to IUF.
- Non-student accounts receivable write-off for fiscal year 2003 was only \$231.70.
- Implemented the new IU Policy and procedures for Revenue Producing accounts.
- Installed FIS, IUIS and dial up to IU South Bend local area network for In\*Source (an IUSB agency) and trained the staff on how to do disbursement vouchers and look up financial information. Also, trained staff on how to run financial statement from FDRS.
- Assisted the Director of Purchasing and Contracts with educating the SGA officers on proper IU Policy and procedures related to procurement and fundraising.



- Assisted the Director of Purchasing and Contracts on procedures for campus events as related to liability exposure, independent contractor status and letters of agreement.
- Developed payment and process procedures with the Director of Purchasing and Contracts related to car rentals with Enterprise. This enabled IUSB to discontinue operating its own motor pool which is a savings to the University. A two day trip to IU Bloomington campus can save a department in costs approximately \$40 over using the former motor pool vehicle or personal vehicle.
- Completed monthly budgeting in all Auxiliary and Student Government accounts during budget construction. Built in reserves for all accounts except Dining Services.
- The Director of Auxiliary Accounting Services completed Fiscal Officer Training provided by University Administration (UA).
- The Director of Auxiliary Accounting Services completed the two year Collegiate Management Institute management program.

## **BOOKSTORE**

(Submission from Brian Freese)

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### **SERVICES**

The purpose of the Bookstore is to provide, at competitive prices, required and supplemental educational materials, supplies, imprinted merchandise, and other products and services necessary to fulfill the needs of students, faculty, staff, alumni, and the public.

The Bookstore carries approximately 1,500 textbook titles (each semester), 500 reference book titles, 400 snack/beverage choices, 325 choices of greeting cards, 300 supply items, 150 imprinted gifts or articles of clothing, and 30 software titles with the ability to special order many more. The Bookstore is also responsible for organizing, ordering, and distributing student and faculty regalia before each year's commencement.

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### **STAFF**

The Bookstore staff consists of a Director (hired in June 1999), 4 full-time employees (down from 7 in 1999) and a varying number of part-time and student employees. The full time staff includes a textbook manager, textbook assistant, retail operations supervisor and shipping and receiving coordinator. *(See organization chart on appendix A-8)*

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### **ACCOMPLISHMENTS AND CHALLENGES**

*Bookstore Gross Margin:*

FY' 03 26.96%

FY '02 29.74%  
 FY '01 31.44%  
 FY '00 24.13%  
 FY '99 15.35%

*Textbook Buyback Program:*

2002 – 2003 academic year buybacks \$328,524  
 2001 – 2002 academic year buybacks \$292,900  
 2000 – 2001 academic year buybacks \$230,800  
 1999 – 2000 academic year buybacks \$209,900  
 1998 – 1999 academic year buybacks \$153,000

*Sales:*

FY '03 \$3,365,924  
 FY '02 \$3,205,034  
 FY '01 \$2,814,624  
 FY '00 \$2,822,556  
 FY '99 \$2,369,324

*Profit Contribution:*

FY '03 \$398,455  
 FY '02 \$238,251  
 FY '01 \$353,507  
 FY '00 \$134,764  
 FY '99 \$195,666 negative

The bookstore contributed \$ 122,409 to the general fund source of funds through rental fees and assessments. In addition, the bookstore is responsible for purchasing the stores computers and related equipment used by the staff.

Being a “retail auxiliary” the numbers tell the story. The gross margin for the bookstore operations is staying within percentage points from year-to-year, the bookstore has more than doubled the amount of money given students back through the buyback program which decreases their overall book expense, and sales have increased by nearly \$1 million since year ending 1999.

The numbers are a reflection of the director’s ability to develop the product mix, listen to the students, faculty and staff needs and desires, and ability to constantly strive to serve the students, faculty and staff in the best way possible.

As enrollment and credit hours increase, space becomes a primary concern for the bookstore operations. Finding ways to keep students interested in utilizing the services and purchasing products at the bookstore is also a challenge.

## **COPY CENTER**

(Submission from Debbie Richards)

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### **SERVICES**

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The purpose of the copy center is to provide high quality duplicating services to the IU South Bend campus. This is done by assisting campus departments with their duplicating needs by supporting existing duplicating equipment and by using all available resources.

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### **STAFF**

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The IU South Bend Copy Center is staffed by two full time employees. Both are long term employees who have provided excellent service to the University through multiple changes in the Copy Center from eliminating the off set press, to its current function as a duplicating and finishing center. Hours of operation are extended during the fall and spring semesters to allow convenient use for students, faculty and staff. *(See organization chart on appendix A-9)*

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### **ACCOMPLISHMENTS AND CHALLENGES**

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Fiscal year 2003 completes the third year of a five year agreement with Advanced Imaging Solutions. Wiring requirements to connect the copiers to a centralized billing system has been completed and FY 2004 will see the copiers connected to this system. This will allow campus users to access duplicating from any of the connected copiers on campus by using a pin number and account code.

Campus duplicating services currently includes fifty-three (53) fleet copiers as well as four pieces of equipment located in the Copy Center to meet the needs of the campus community. Copy Center equipment includes a 65 copy per minute black and white copier, an 85 page per minutes black and white copier with memory to retain files for 'on demand' duplication, a Cannon color copier and a Risograph, which produces low cost one color documents. Copiers were originally placed in the fleet as determined by departmental requirements and anticipated copy volumes. The need for additional copiers requires careful determination of need based on anticipated volume, ability of the department to support equipment and impact on the overall campus agreement. Existing copiers are continually evaluated for use based on best volume for a particular piece of equipment. Copier moves to make best use of existing equipment are made based on these evaluations.

The original agreement with Advanced Imaging Solutions included a Fleet Manager who was responsible for maintaining supplies, obtaining copy counts and general overall first response to any difficulties with the fleet copiers. Due to the downturn in the economy and subsequent reduction in state funding for I U South Bend, this position was eliminated and the responsibilities were transferred to IU South Bend Copy Center staff. Those responsibilities include maintaining adequate inventory to supply each type of copy machine on campus, delivery of supplies to departments as requested, obtaining copy counts for each machine monthly, and general first response to assist with paper jams and other equipment malfunctions. The Copy

Center staff quickly adapted to these additional responsibilities and have a close working relationship with the Advanced Imaging technician assigned to the campus.

By adjusting Copy Center staff hours during the Fall and Spring semesters, the Copy Center is able to be open from 7:30 a.m. to 6:00 p.m. This has allowed graphic design students access to the color copier during class time to print and retrieve documents and class projects. The graphic arts laboratory is connected to the color copier in a print mode, enabling the production of class work on campus. Previously, students were required to obtain color printing services from a number of local vendors at significant cost. The Copy Center is able to provide this service on campus at reduced cost.

Most of the current copiers on campus may be connected to the campus network to be used as printers, which would provide finishing for print jobs such as two sided printing and stapling. The cost to departments would be the addition of a data line charge on a monthly basis. The wiring should provide for this service at the discretion of each department. The Copy Center will not be responsible for costs associated with printing to each of the copiers, but will continue with the routine maintenance supply support.

The migration from duplicating to printing has resulted in a significant drop in campus duplicating volume, which alters the campus picture in terms of equipment and supply needs. This migration is university wide and has fostered a work group to explore printing needs across all of the IU campuses. A centralized system of print management will need to be implemented to allow students, faculty and staff to account for print volumes that currently are estimated based on paper usage. According to current trends, print quotas for student printing drastically reduces the print volume on those campuses that have initiated this effort. The assumption is that students stop needless printing and print only what is necessary for class work. For this to be effective, the quota must allow students to print all necessary work. With IU campuses moving toward more on-line and web based instruction, printing needs for students have increased. Many syllabi are now available on the web, rather than being printed as in previous years. Students may print the syllabus if they wish. While this reduces over-all duplicating expenses for departments, it has likely caused an increase in printing in the student labs. Assignments and projects are also obtained on the web through "On-Course" and other programs, with additional increases in student printing. The challenge is to create a student quota, paid through technology fees, that adequately encompasses student needs while restricting a total volume of prints per semester.

For fiscal year ending 2002 the total duplicating sales in the Copy Center were \$118,609. In fiscal year 2003 the total duplicating sales were \$106,700, a reduction of \$11,909. With increases in overhead expenses combined with reductions in revenue, the Copy Center is facing a crossroads. After careful evaluation, decisions regarding the overall value to the campus must be considered.

## **DINING SERVICES**

(Submission from Kirk Elliott)

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### **SERVICE**

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The purpose of Dining Services is to provide food service options at a variety of locations across campus, that best serve the needs of students, faculty, and staff. Dining Services and the Events Specialist also manage room reservations for the Student Activities Center (SAC) conference rooms, student lounge and patio, pavilion; Main Café, Chancellor's Dining Room, Alumni Room, and Board Room in the Administration Building. The Events office has also moved to a "one stop shop" for anyone holding events on campus; facilitating arrangements with all university entities on the behalf of the user.

Dining Services also provides a variety of catering services for the IUSB family as well as outside entities, and also provides a variety of ancillary services such as concessions, children's center food service, and mobile services.

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### **STAFF**

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Dining Services is comprised of 2 full time staff members and 17 part time hourly staff members. During the summer months the staff is reduced to 4 part time hourly staff. The full time staff consists of the Director and Crew Leader (Main Café). The part time staff consists of the Events Specialist, two supervisors of the SAC food service (Courtside Café), lead cook, line server/cashier, line server/grill cook, one dishwasher, one cashier, and 15 student workers doing a variety of tasks. (See organization chart on appendix A-10)

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### **ACCOMPLISHMENTS & CHALLENGES**

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- In July 2002 the prepaid Dining Cards were installed to give greater flexibility in payment and implemented frequent diner cards for coffee and sandwiches.
- During the year actively recruited part time student employees. Dining Services now employs an average of 15 students during the fall and spring semesters which contribute to the success of student retention.
- In spring semester added a temporary part time Events Specialist position to the staff of Dining Services. Effective in October, 2003 this position will be transferred to the division of University Advancement and Public Affairs.
- Hosted two successful events including the YWCA "Tribute to Women", on March 27, 2003 which had over 1000 attendees. This was the first event of that size ever held on campus. On May 9, 2003 successfully hosted the regional Boys and Girls Club/Big Brothers Big Sisters annual fund raising dinner with Mike Davis; with over 600 attendees.

- In April the Director of Dining Services received the "Unsung Hero" award from the Student Government Association.
- Catering sales increased in FY 2002 from \$68,698 to \$111,305 in FY 2003. Overall sales increased by \$86,352 including \$16,011 from vending commissions. Cost of goods sold percentages improved from 44.15% in FY 2002 to 38.67% FY 2003 resulting in a 5.48% improvement. Operations at the end of the fiscal year resulted in a loss of (\$48,979). However, this was an improvement of \$77,604 over the prior year.
- Challenges facing Dining Services include maintaining a positive cash flow FY 2004 while at the same time keeping high levels of service with part time staff.

## **HOUSING**

(Submission from Karl Stetler)

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### **SERVICE**

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During the 2002-03 fiscal year Housing Services managed 35 houses and 96 student tenants. The housing staff are one of the first campus contact with international students. They explain the rules and general information about housing and maintain the leases. Housing is also responsible to record work orders for housing maintenance. They provide all maintenance and ground care year round. They also inspect the houses on a monthly schedule and make sure the students are keeping the houses in order. *(See chart organization on appendix A-A)*

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### **STAFF**

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The manager of custodial services in facilities management also oversees the housing operation on all levels. This includes inspecting houses, handling student complaints which include roommate disputes, and maintaining a smooth transition of student moves at semesters end. The manager is also responsible for repairs, identifying and correcting risk factors.

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### **ACCOMPLISHMENTS & CHALLENGES**

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- Renovated fourteen (14) houses which included bathroom and kitchen remodels, fresh paint and carpeting.
- All 35 houses were cleaned and basements were emptied of old appliances and junk that had built up over a period of years. All garages were cleaned out and we were able to create extra storage space.
- All houses were inspected by the University Administration Risk Management Department for life safety issues and structural repair needs.
- All houses had their electric panels and wiring inspected and all necessary repairs were performed.
- All houses have new 10 year lithium battery smoke detectors installed in every bedroom, kitchen, basement and stairwell.
- A new appliance program is in place, appliances are no longer purchased used. We now purchase new and have warranties on our appliances, which has reduced time spent making repair calls. This program has also received a very positive response from the students.
- The street lighting was in bad repair, we worked with AEP and now have good night lighting from the street and in the alleyways.
- An environmental hazard program is in place. We have removed bushes and tree limbs which were near entrance ways and near windows. This helps to insure student safety.

- All houses are inspected daily for yard maintenance and loose trash. This has greatly increased our relationship with the home owners in the neighborhood.
- We have issued purchase orders for new roofs to be installed on seven houses.
- Sidewalk repairs are on the list for 2003-04 improvements which will bring us up to city code.
- Most houses are 50 to 75 years old and will continue to have repair issues. A dedicated housing maintenance worker will be in place for the 2003-04 year which will allow us to address repairs in a timely manner.

## **PARKING SERVICES**

(Submission from Martin Gersey)

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### **SERVICE**

Parking at IU South Bend is an auxiliary service that serves the campus community by developing, operating and maintaining campus parking facilities.

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### **STAFF**

Parking Services is staffed by one supervisor, one clerk and one parking control specialist. Parking Services is part of the Safety & Security department. *(See chart organization on appendix A-6)*

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### **ACCOMPLISHMENTS & CHALLENGES**

Revenues increased 6% from last year, and expenditures were down approximately 6%. This is due in part to recent reductions in expenses for parking lot maintenance and snow removal.

The increase in income and decrease in expenses has resulted in an 18% increase in our cash balance. This supports our financial planning efforts to support future parking needs.

Challenges in the Parking Services department include developing strategies for dealing with intermittent parking shortages. Such strategies will require working with other campus constituents to provide access to parking facilities on a more evenly distributed basis. This is a complicated issue since various factors (e.g., course scheduling) determine when people come to campus, and for what time period they are here.

The current schedule of courses results in an inordinate number of students on campus during certain week days. This is a pattern that has repeated for several years.

Another challenge is in communicating information to the campus community so that everyone is aware of campus parking policies and procedures, and are made aware of changes in parking facilities that may be necessary throughout the year.



Parking Services must also plan to provide parking facilities for future campus expansion. This includes budgeting sufficient funds to hold in reserve to prepare for future expansion. Overall campus planning must include the provision of sufficient parking facilities.

## **SUPPORT SERVICES**

(Submission from Dean Corey)

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### **SERVICE**

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Support Services department was functionally aligned within the Facilities Management department reporting to the Maintenance Supervisor. Support Services department personnel provide the campus with mail services, shipping and receiving, and special set ups and moves. Effective August 25, 2003 the department reporting changed to Director of Auxiliary Accounting and Support Services.

Support Services is a multi-faceted department. The services provided by the six full time employees are essential to the IU South Bend community. From delivering transcripts to the registrar to delivering refrigerators to the Child Development Center, the Support Services staff works diligently to meet the demands of the campus.

**Mail Services:** Mail is picked up from the United States Post Office (USPS) at 7:15 AM. It is brought back to Northside Hall (NS) 0028 and sorted by department. The USPS also delivers several tubs of mail to the loading dock each day that is also sorted by department. On an average day most mail is sorted before the carriers begin deliveries. Other Support Services staff sort mail not sorted beforehand so that it goes out the same day it is received in the office. There are three established delivery routes. Route 1 includes the Administration building, Purdue Technology (PT) building, Fine Arts, and the Jordan International Programs (JIC) house. There is a total of 39 delivery and pick up points along this route. All locations except the JIC and PT receive 2 pick-ups and deliveries each day. The carrier usually leaves 9:00 and 9:30 AM to begin deliveries. This route usually takes about 1.5 hours to complete, depending on the volume of mail being handled. This carrier also picks up Copy Center job orders and brings them back to the office to log them in and distribute them according to mail code or locations. Route 2 includes Schurz Library, Northside Hall, Riverside Hall (RS), Greenlawn Hall (GL), and Wiekamp Hall (DW). There are a total of 27 stops on route 2. With the exceptions of RS and GL, each location receives 2 pick-ups and deliveries each day. The third route (mini-route) is the Student Activities Center (SAC) and is serviced randomly by staff members as they deliver packages around campus. Mail technicians also deliver small express type packages, usually daily, as mail volume permits. Support Services technicians metered 230,444 pieces of outbound mail totaling more than \$116,000.

**Shipping and Receiving:** Packages start arriving at around 8:00 AM. On most days, a steady stream of in bound shipments continues until about 2:30 PM. The first packages are usually express packages from Airborne or Fed Ex. On an average day we receive 100-125 packages from a variety of carriers including many over the road companies such as Roadway. This workload can go well over 200 packages at the beginning of each semester when departments and professors are ordering items for classes. When a package is received, the receiving clerk checks it into the Indiana University Information System (IUIS). Once a package has been checked in, a receiving document is printed and attached to the package. Our customer

signs the receiving document when the package is delivered to them to verify delivery. This document is our checks and balances system because it acts as a chain-of-custody for packages received by the campus. During the year we delivered more than 12,400 packages to faculty and staff. These ranged in size from an express envelope to a skid of paper.

**Special Set Ups and Moves:** The one full time employee is usually assisted by an S&R (shipping and receiving) technician (hourly) or the Support Services Supervisor. They complete all major moves such as office moves and heavy or large items. Other small moves that take less than 30 minutes to complete and do not require special equipment are usually completed by the primary move technician. The technician also completes all special event and meeting room set up requests throughout the campus, again with assistance as needed. Moving responsibility ranges from moving boxes of sensitive documents that need to be shredded to moving entire offices. This technician also assists S&R in delivering large packages, such as refrigerators and desks. There are no typical special set ups. Seating for special set ups varies usually from about 30-150 people. On occasion we set up for 200+ occupants in the Main Cafe and the Associates building. Special equipment such as a podium and stage risers are used on many of the set ups in the Main Cafe. Podiums are also delivered to other sites around campus as needed. Technicians bring in and set up tables and chairs for all set ups when the facility is not already equipped with this equipment. During the year, we completed 1,100 of these work orders. The more visible annual special set ups include the IUSB Fest, New Student Orientation, and graduation. More than 1,100 such moves and set-ups were performed by the support services staff in the 2002-03 fiscal year.

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## STAFF

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Mail Services is staffed by two full-time employees. Two people staff the shipping and receiving (S&R) department on a full time basis. One full time employee staffs the special set ups and moves. During all of FY 2003 Support Services had an hourly part-time employee technician. This individual provided the flexibility to meet short notice demands and to cover all areas when persons were on vacation, leave of absence, or on paid time off. The Support Services coordinates all three areas. *(See chart organization on appendix A-7)*

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## ACCOMPLISHMENTS & CHALLENGES

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During FY 2003 Support Services supported all major campus events including: New Chancellor Installation, IUSB Fest, senatorial visit, the new IU president visit, Commission on Higher Education meeting, Board of Trustees meeting, YWCA, and YMCA. We were able to discontinue the use of an in-house motor pool by using locally procured assets to meet the Campus' travel needs. This not only saved money but also increased the services available to our campus. Through an aggressive replacement program we were able to replace heavily worn tables with 25 new light weight plastic tables, thus improving the usefulness of these assets to our customers who now specifically ask for these tables for events. A major accomplishment was to save the IU South Bend Arts Foundation \$2,000 - \$3,000 in shipping out exhibits used during their spring show at the gallery, via Airborne. Lastly, the placement of an Airborne Express drop box within Northside has increased the availability of services to our customers.

The biggest challenges facing this department are the continued growth of the campus. Ways of meeting this challenge are through the use of work study students and or a 10-month employee. Another challenge is to move the shipping and receiving operations to a more user friendly location, namely the ground floor offices and storage area of Northside. Training faculty and staff on the Airborne on-line package services will enhance user services and streamline campus accounting practices. Finally, we want to continue our modernization program by purchasing more plastic table, folding chairs, and equipment to move items around campus.

## BUSINESS & FISCAL SERVICES

### ACCOUNTING SERVICES

(Submission from Donna Broadstreet)

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#### SERVICE

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The purpose of Accounting Services is to provide fiscal support to I U South Bend for accounting and payroll transactions. Accounts Payable and Accounting Records representatives process the payments for IU South Bend invoices as well as a variety of other disbursements including processing employee and revolving fund reimbursements to name a few items. The Accounting Records representative also processes various accounting transactions such as redistribution of income/expense, general error correction and so forth that affect the general ledger.

Payroll Services is responsible for the processing of bi-weekly and monthly payrolls as well as supplemental pays, employee deductions, academic and hourly E-Docs (electronic documents for the Human Resource Management System) and the maintenance of bi-weekly paid-time-off time banks to name a few items.

Accounting Services also handles a variety of accounting transactions and maintains transaction records for the campus. Accounting Services also assists with year end closing preparation. We are responsible for disseminating information and providing training to campus administrators and staff regarding financial systems and the appropriate use and interpretation of transaction processing documents and policies.

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#### STAFF

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Accounting Services is comprised of six (6) employees: Accounts Payable Representative, Accounting Records Representative, two (2) Payroll Representatives, Department Secretary and the Director.

In fiscal year 2003 Ann Holston, account payable representative celebrated 31 years of service with IU South Bend. Donna Broadstreet was hired November 18, 2002 as the Director of Budget Planning and Accounting Services; she has worked for Indiana University administration in Bloomington, since January 1985.

The Accounts Payable Representative and Accounting Records Representative were cross-trained and the Accounting Records Representative was also cross-trained to process payroll. For the fiscal year 2003-04 the Transaction Records representative position was eliminated. The transaction processing duties, budget analyst duties and payroll supervision has been combined into a new position. (*See chart organization on appendix A-11*)

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## ACCOMPLISHMENTS & CHALLENGES

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Successfully implemented phase one of the People Soft HRMS payroll system. Dual systems were run in December 2002 and the new process went live in January 2003. Accounts Payable processed over 10,092 invoices during the fiscal year. Also, the area trained several administrators and staff concerning travel policies and procedures, accounting policies and procedures and on how to pull monthly operating statements from the web.

Challenges include finding adequate space for record required storage and retention. Also included is working with university administrators and staff to insure they understand "all" of the documentation needed in order to initiate a payment request and that such documentation is completed accurately and timely. It is also important to focus on potential change in processes, procedures and staff responsibilities for Payroll and Human Resources related to HRMS implementation without benefit of optimal staffing levels. Another item includes overcoming challenges of information overload and getting the "important" and "urgent" information to all of the appropriate individuals in the most appropriate fashion timely. Also need to provide timely service and accurate data for the budgetary and transaction processing needs of the campus.

### BUDGET PLANNING

(Submission from Donna Broadstreet)

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#### SERVICE

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The purpose of Budget Planning is to provide budget support to the campus in connection with the University Budget Office (UBO). These services are provided beyond the typical "budget construction" period, it spans the entire fiscal year.

Budget Planning requires the receiving of various reports from UBO, disseminating that information to the Colleges, Schools and Divisions, holding numerous meeting to discuss the reports, and then submitting the reports back to UBO. Budget Planning also requires communications with the Academic Senate Budget Committee by the Vice Chancellor for Administrative and Fiscal Affairs.

The Budget Office assists the Divisions and Schools with "budget construction" in the spring as well as budget support during the fiscal year. Budget support entails realignments within an account and transfers within and between different fund groups for the campus. The Office of Budget Planning is also responsible for compiling and providing detailed financial reports and analysis on an on-going basis as well as on an as-needed basis.

Routine functions include E-Doc budget approval (electronic document for the university Human Resource Management System; i.e. HRMS), purchasing budget approval, preparation of budget adjustments and transfer of funds centrally for the campus and assist schools, divisions and staff with document preparation, assist in budget construction (entry and training), prepare sabbatical & adjunct expense reports, prepare salary savings reports and assist with Financial Information System and Financial Data Retrieval System training.

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## STAFF

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Budget Planning was comprised of two staff members and the Vice Chancellor. The Director of Budget Planning and Accounting Services (from November 18, 2002 through June 30, 2003) and the Senior Budget & Financial Analyst (from July 1, 2002 through April 18, 2003). The Senior Budget and Financial Analyst position was reassigned to Academic Affairs and is currently on assignment in the Raclin School of the Arts. *(See chart organization on appendix A-11)*

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## ACCOMPLISHMENTS & CHALLENGES

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The annual budget process and construction for fiscal year 2003-04 was successfully and timely completed. The annual budget book for fiscal year 2002-03 was also completed. The Vice Chancellor met with the Academic Senate Budget Committee and presented the 2002-03 official budget report and 2003-04 budget preparation timeline. Prepared fee review committee report which included the review of student fee rates. In addition, the incidental income report which included projected non-tuition income and the credit hour enrollment projection for the fiscal year 2003-04 were completed.

## BURSAR SERVICES

*(Submission from Linda Lucas)*

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## SERVICE

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The purpose of Bursar Services is to provide fiscal support to IU South Bend for student receivables, departmental banking functions, and student club accounts and provide customer service to students regardless of their status (current, prospective, or past) and to further enhance the IU South Bend student mission and overall campus reputation in the community. Routine functions include cashiering; processing advances on financial aid for eligible students, student financial appeals, third-party sponsorship billings, student club deposits and disbursements, daily campus deposits, customer payments for deposits into departmental IU accounts; provide clearances for registration when appropriate; issue bookstore vouchers for eligible financial aid students; set up semester files for accurate fee assessment and monitor student payment plans

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## STAFF

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Bursar Services is comprised of five (5) employees: two (2) Cashiers, the Billing & Collections Specialist, the Associate Bursar, and the Bursar.

All the positions are cross-trained to handle the cashiering functions. *(See chart organization on appendix A-11)*

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## ACCOMPLISHMENTS & CHALLENGES

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- Utilization of bank processor for student payments (lock box)

- Utilization of IUPUI Mail Services for the printing and mailing of student Schedule Confirmation/Bursar Account Statement for all advance registered students; also used for printing & mailing of all monthly billing statements
- Utilization of independent collection agencies for delinquent student receivables. During the 2002-03 fiscal year 1,664 accounts were placed in collections amounting to \$1,565,742. The collection agencies collected \$519,679 or 33.19%. The collection fee charges totaled \$80,963.
- Procedural change from direct lending with the Department of Education to regional loan processing with Sallie Mae in preparation for change to PeopleSoft in Fall 2004
- Change in depository bank from National City to Fifth Third in an effort to reduce cost and increase customer service to the University
- Implementation of direct deposit of student refunds which returns excess financial aid to students 5-7 days earlier than with the default paper check method
- Continuation of internal collections office & procedures for overdue student receivables in conjunction with written payment agreements set up with students; payment agreements average about 900/yr; internal procedures have direct impact on reduction of write-offs since first implemented in 1999. (see IUSB Write-Off History spreadsheet)
- For the fiscal year over \$5,557,000 of payments were via credit card for the bursar area. The bursar office was assessed discount fees in the amount of \$84,370 or 1.52 percent of total credit card payments. Use of credit cards provides faster payment for the campus resulting in interest earnings on a larger cash balance for a longer period of time. In addition, the credit card payment provides a convenient source of funds for students who may not be eligible for student financial aid.
- Implementation of web-based student receivable payments using current ACH web payment option is available although not frequently used because IU is eliminating this system in preparation for the move to InfiNet, another web-based payment system which will allow both ACH and credit card payments. Current web-based payment system is not compatible with PeopleSoft, so IU is not publicizing it since PeopleSoft for the bursar office will be implemented in Fall 2004.
- Implemented method for advancing funds to students whose financial aid has been delayed in processing. Also, added emergency short term loan option for students who suddenly face financial crises.
- Participated in five student orientations (710 students) including four during the summer of 2002 and one in December 2002 for new spring semester students. Provided information regarding bursar personnel, fees, registration and schedule confirmations/billings, payment and payment plans, student confidentiality, book vouchers, and Tax Relief Act of 1997 (TRA).
- Challenges include financial constraints in responding to other departments' budget cutting efforts, such as Registrar's Office eliminating printing of schedule confirmations

after mass print job at IUPUI. Bursar Services may need to add additional print jobs which would be at our department's expense.

- The current TouchTone system will be eliminated within the next 12 months as the campus moves to web-based payment option.
- Financial constraints in providing necessary PeopleSoft training for staff.
- Possible staff shortage as we transition to PeopleSoft in next 1.5 years
- Increase in cost of bank credit card fees.

## **PURCHASING & CONTRACTS**

(Submission from Debbie Richards)

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### **SERVICE**

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Purchasing and Contract Services at IU South Bend works to enhance the purchasing experience by working in partnership with those in need of goods and services. We strive to provide a responsive and responsible service toward the collective support of the University – its educational, research and public service missions.

Central to the purchasing mission is the application of technology, policy, state and federal regulations, maintaining positive internal and external customer relationships, and developing skilled expertise. We do so with the highest legal and ethical standards accompanied with courtesy, professionalism, diplomacy, effective communication, vigilance, efficiency, teamwork and humor.

Purchasing responsibilities also encompass safeguarding University assets and to insure appropriate stewardship of University funds. Our actions support and advance the University's objectives and protect it from unnecessary costs and legal and political challenges.

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### **STAFF**

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The Purchasing staff consists of the Director (PA), Senior Buyer (PA), Contract Analyst and Systems Coordinator (PA) and a Purchasing Assistant (CLOC). A search is underway to hire a Senior Buyer who will be directly responsible for most of the day-to-day operational responsibility for purchasing services. A search will begin in early October to hire a Contract Analyst and Technical Coordinator who will be responsible for contract issues and general departmental training, such as general information development and distribution, assistance with development and maintenance of contracts and contracts issues, assistance to campus departments who have risk management or service agreement issues and to provide a source of information for the campus with regard to legal issues surrounding contractual agreements and training on university systems and policy. It is anticipated that this individual will also be involved with the various types of training necessary for web ordering, The On-line Purchasing System (TOPS), B2B ordering, procurement card training, departmental web maintenance and other educational and informational activities.



The Director of Purchasing and Contract Services provides oversight to the purchasing and contract areas and provides direct support for each as necessary. The Director develops and provides a cohesive approach to providing adequate audit information for both purchasing and contract issues as well as developing procedures and processes for the campus. Development of specialized purchasing plans for each department would be undertaken by the Director with assistance from the senior buyer as well as research and development of new opportunities for purchasing agreements and methods. (See chart organization on appendix A-9)

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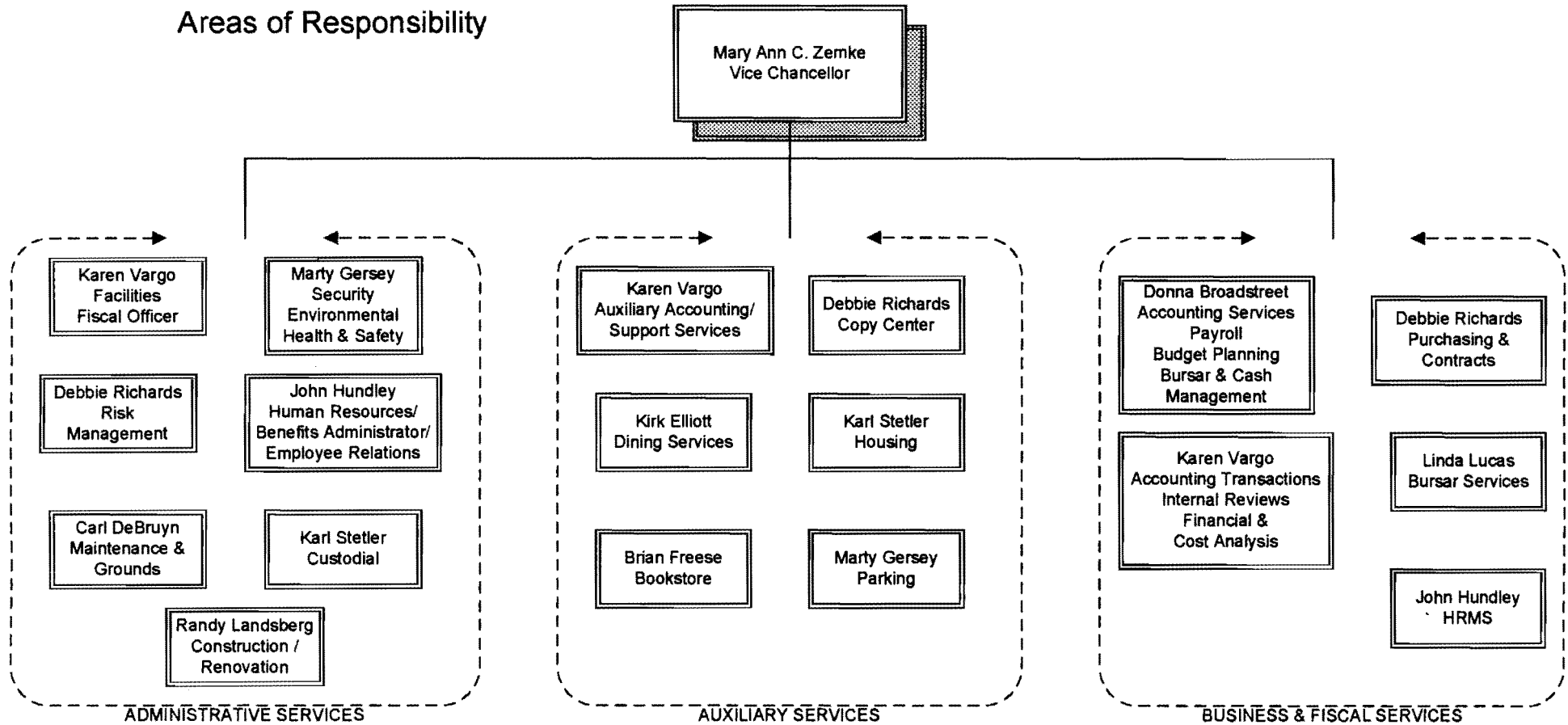
### ACCOMPLISHMENTS & CHALLENGES

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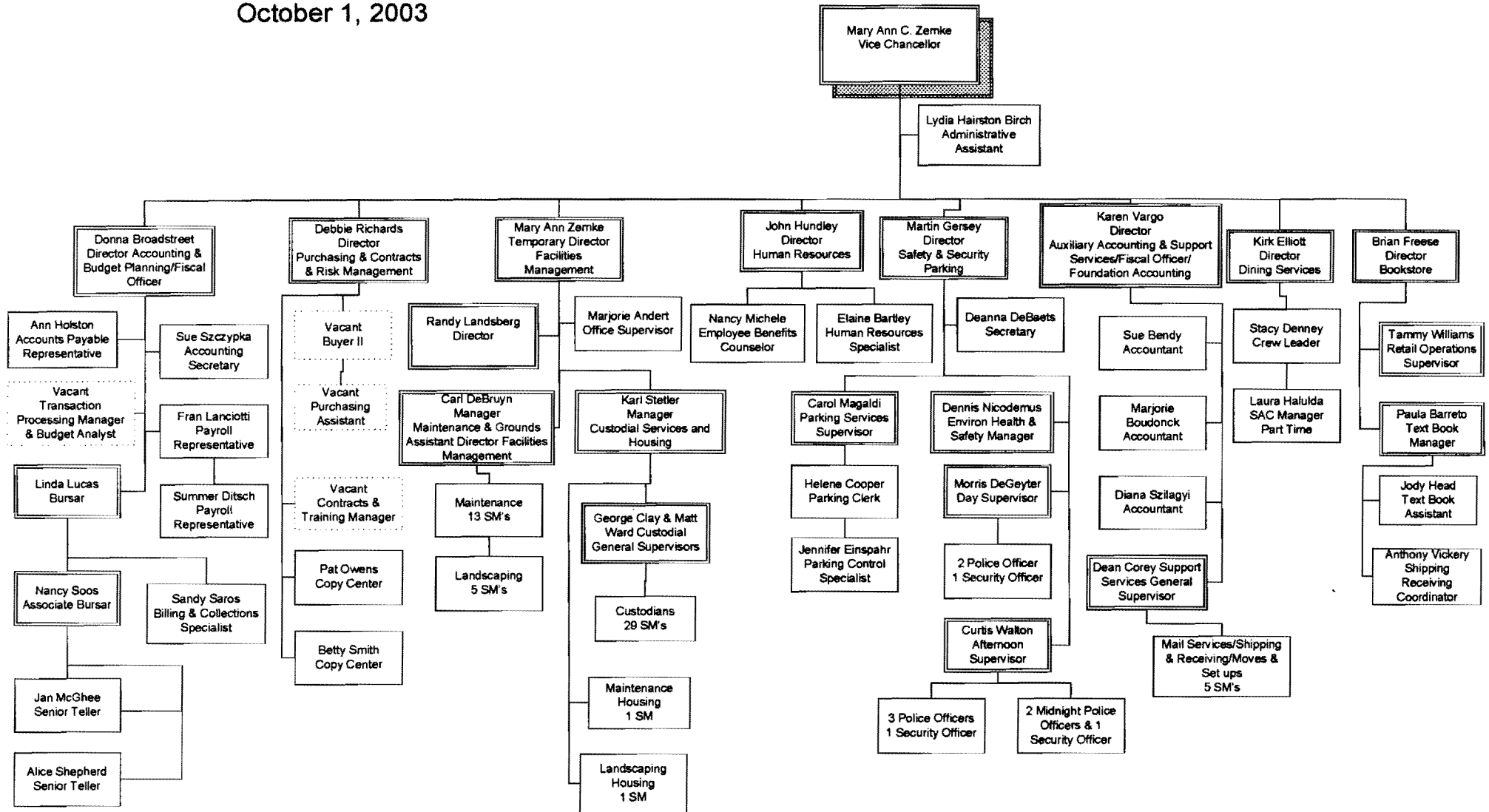
- Provided professional services for the expenditure of \$3.5 million through the purchasing system including TOPS, B2B and procurement card orders with an additional \$350,000 in web based office supply orders
- Issued 5 additional procurement cards with more anticipated with the new fiscal year
- Moved the purchase of office supplies from a paper based requisition system to an on-line web based system. This prepares campus users for B2B and other opportunities as presented and provides next day, desk top delivery of basic supplies to campus users.
- Included in moving to a web based order system for office supplies is the change from a pre-audit to post-audit system. Orders are now sent directly to the vendor, eliminating the need for purchasing to review each order prior to forwarding to vendor. Campus departments will be responsible for their own returned items, thereby decreasing the need for inquiries by accounts payable and purchasing for information and assistance.
- Departments will also status their own office supply orders. Purchasing will stand ready to assist with any problems or difficulties that are not easily resolved.
- 10% of purchasing transactions were completed using the purchasing card.
- Approximately 1.81% of total dollar amount was issued to minority vendors.  
Approximately 1.71% of total dollar amount was issued to female vendors.  
Approximately 4.32% of total dollar amount was issued to small businesses.
- In January a Senior Buyer was hired to assist with the day-to-day operation of the purchasing office. This individual left the University in May. The position has been posted and the search in progress at this time.
- University developed contracts are not always the best for the South Bend campus. While such contracts may benefit the urban campuses, they routinely require additional charges or delays, or just don't provide the best price for the South Bend campus. As a result, South Bend Purchasing must maintain optimal local vendor contacts and contracts as necessary.

# ADMINISTRATIVE & FISCAL AFFAIRS

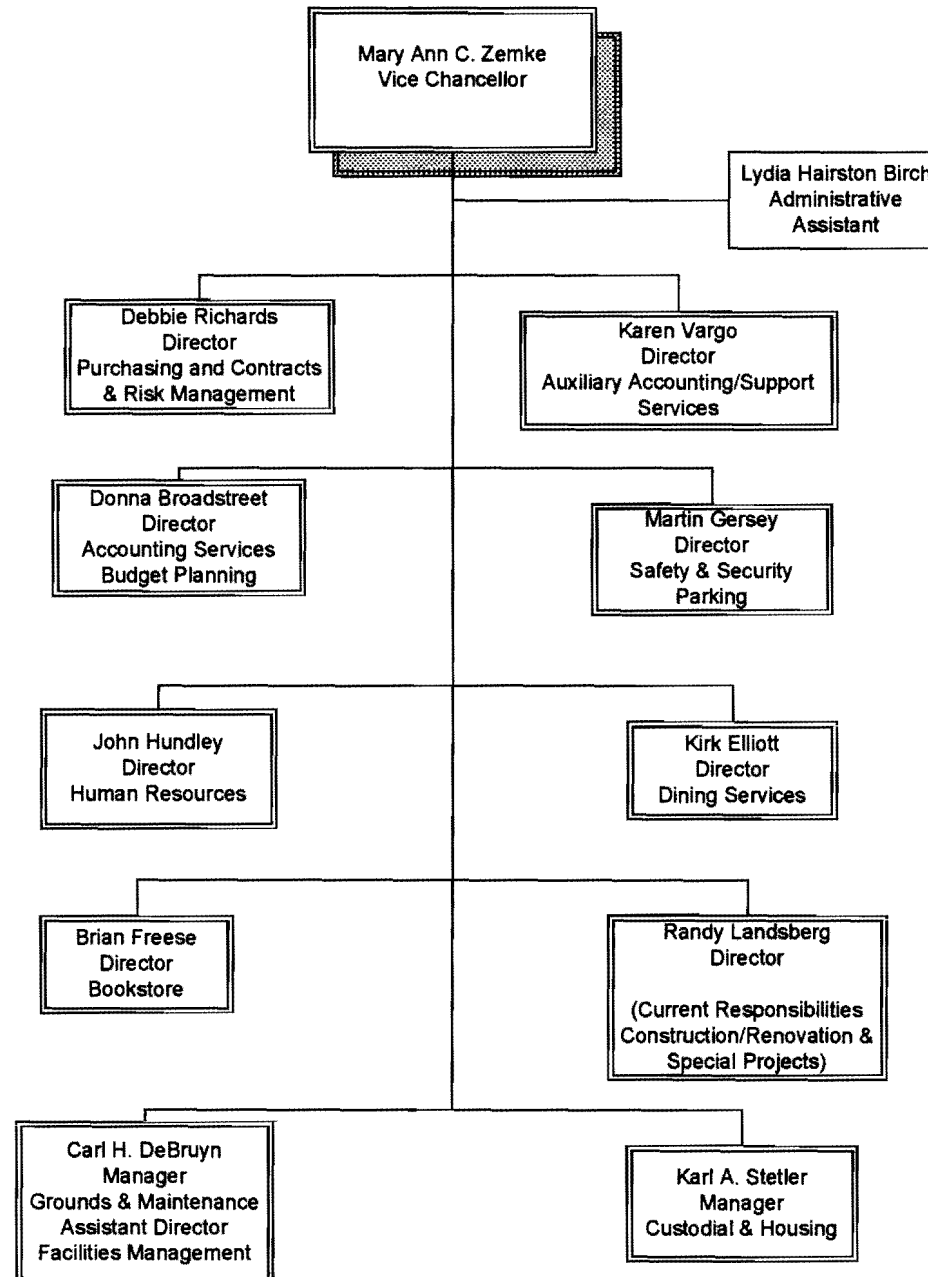
## Areas of Responsibility



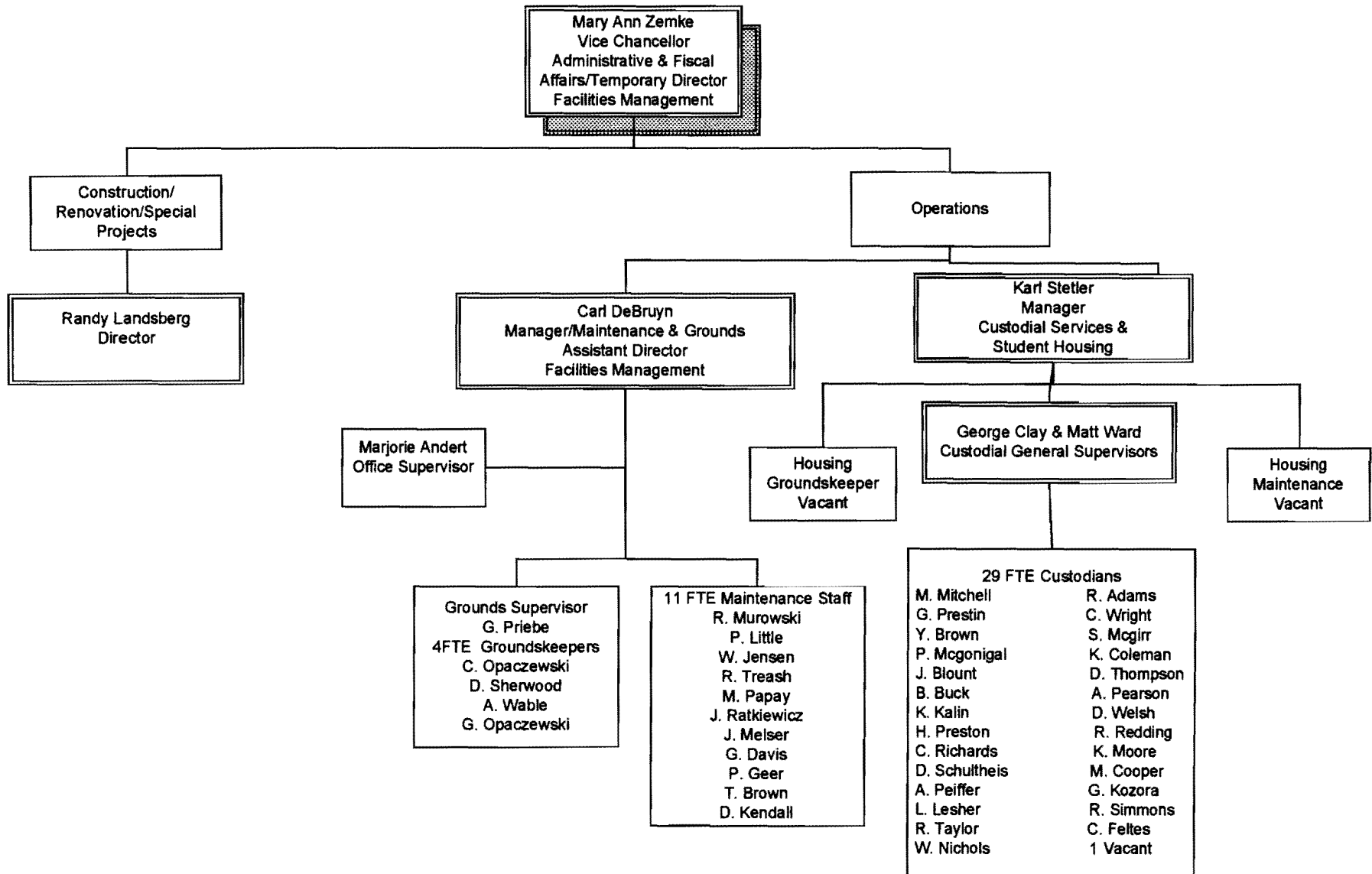
ADMINISTRATIVE & FISCAL AFFAIRS  
October 1, 2003



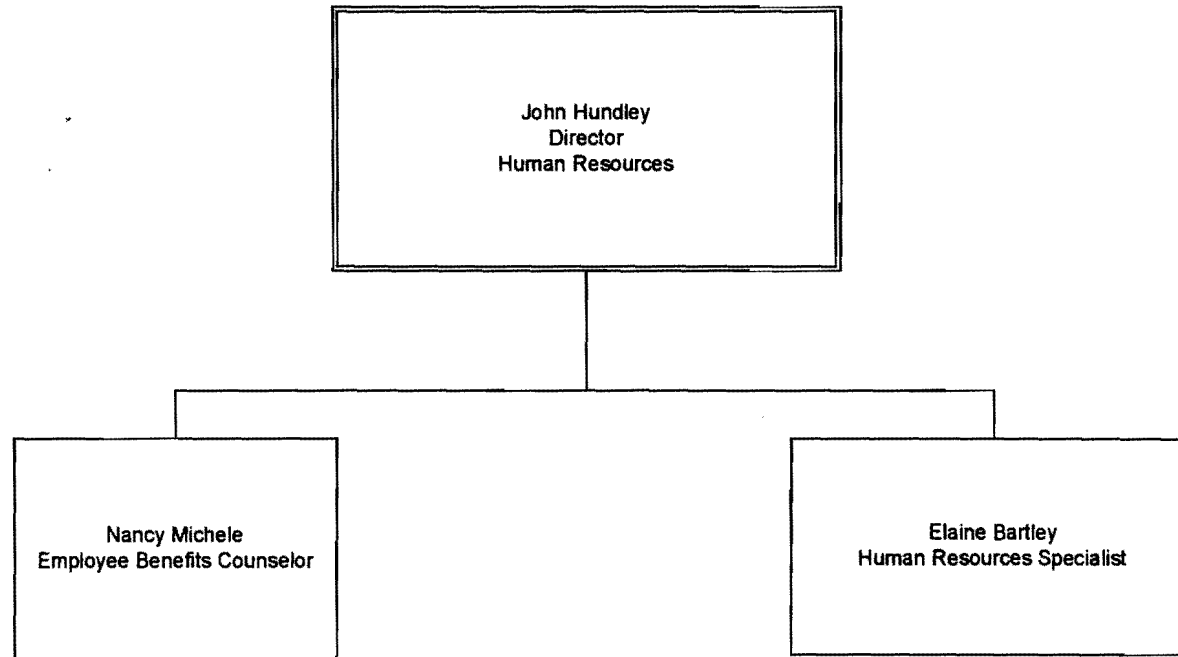
ADMINISTRATIVE & FISCAL AFFAIRS  
Vice Chancellor Direct Reports  
October 1, 2003



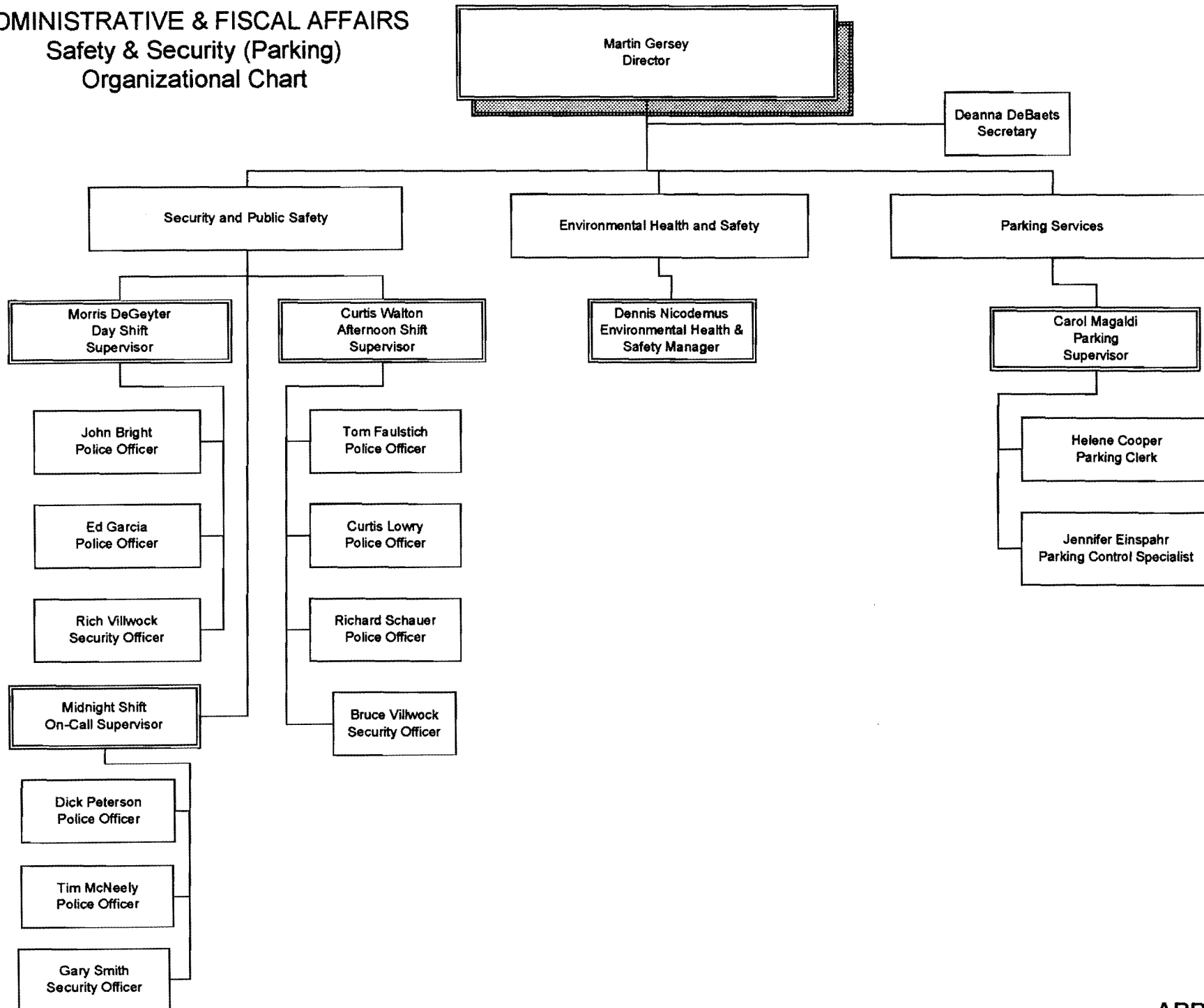
**ADMINISTRATIVE & FISCAL AFFAIRS**  
**Facilities Management**  
**Organizational Chart**



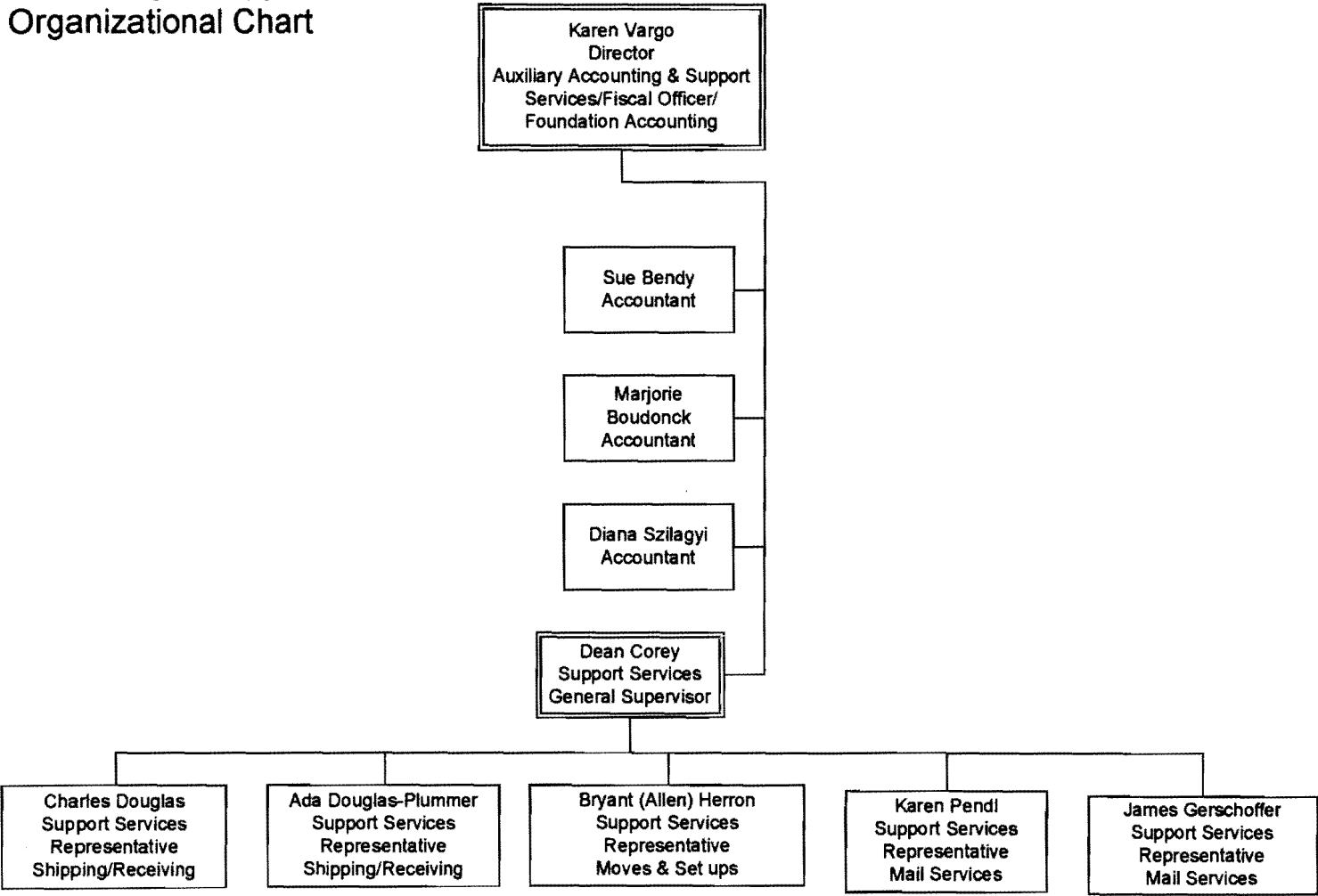
**ADMINISTRATIVE & FISCAL AFFAIRS**  
**Human Resources**  
**Organizational Chart**



ADMINISTRATIVE & FISCAL AFFAIRS  
Safety & Security (Parking)  
Organizational Chart

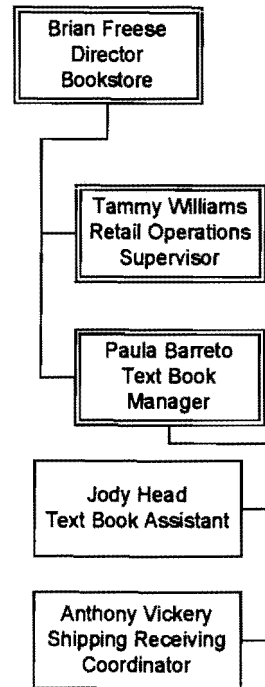


**ADMINISTRATIVE & FISCAL AFFAIRS**  
**Auxiliary Accounting & Support Services**  
**Organizational Chart**

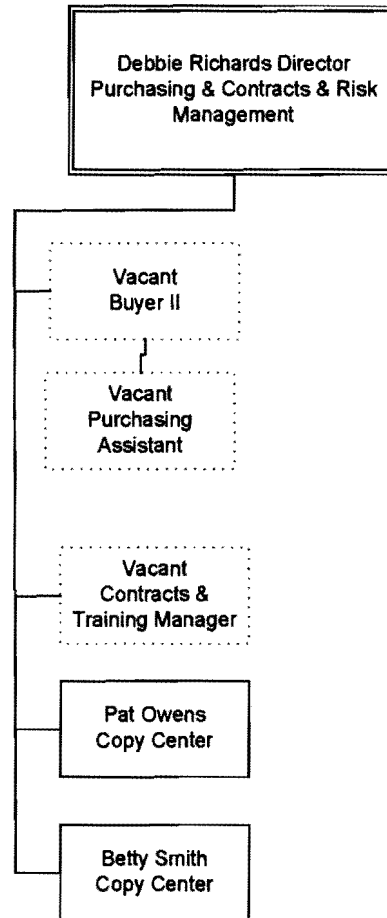




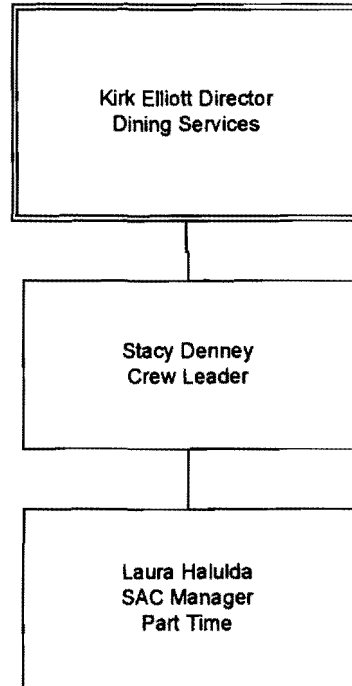
Bookstore  
Organizational Chart



**ADMINISTRATIVE & FISCAL AFFAIRS**  
**Purchasing & Contracts (Copy Center)**  
**Organizational Chart**



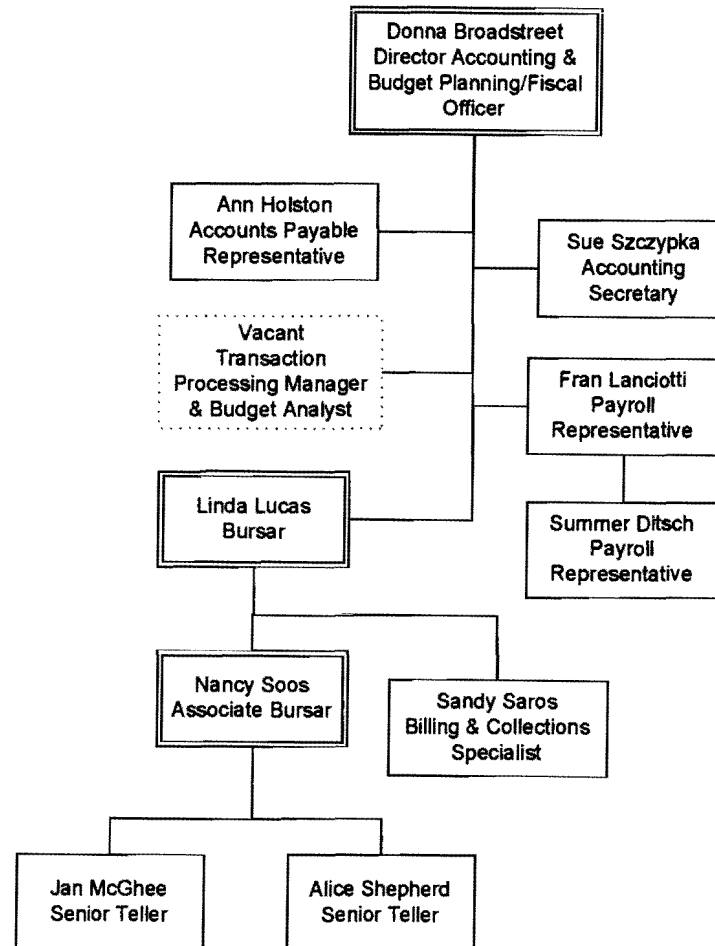
ADMINISTRATIVE & FISCAL AFFAIRS  
Dining Services  
Organizational Chart



# ADMINISTRATIVE & FISCAL AFFAIRS

## Accounting & Budget Planning (Bursar)

### Organizational Chart



## **IU SOUTH BEND**

### **Listing of Facilities Gross Square Footage (GSF)**

<b><u>Building</u></b>	<b><u>GSF</u></b>
Wiekamp	128,406
Student Activities	92,387
Purdue Technology	27,020
Schurz Library	80,811
Northside Hall	293,570
Greenlawn Hall	25,359
Riverside Hall	11,220
Administration Building	84,324
University Center	58,680
Fine Arts	14,083
Associates	124,063
Writing Center	1,993
Jordan International House	3,528
Student Housing	66,036
Parking Garage	<u>220,535</u>
<b>Total Gross Square Feet<sup>1</sup></b>	<b>1,232,015</b>

<sup>1</sup> Does not include 6,679 GSF of leased space in Elkhart or the newly acquired building on Ironwood

## IU South Bend and AFSCME Local 1477-01 2003-2005 Agreement

Subject to the approval of the Board of Trustees of Indiana University and a vote of the membership of AFSCME Local 1477-01, the Indiana University administration and the Officers of AFSCME Local 1477-1 are agreeable to the following changes and modifications in the terms and conditions of employment.

1. Effective July 1, 2003, all appointed Service Maintenance employees will receive a 2.0% increase rounded to the nearest cent per hour on the current hourly rate of pay. Consistent with the two year agreement, discussions for 2004-05 will be limited to wage distribution only.
2. **Budget.** Indiana University will provide the President of AFSCME Local 1477-01 a copy of the budget for the fiscal year beginning July 1, 2003, as soon as it is published.
3. **Corrective Action, Policy 6.8.** The first sentence of Paragraph D.5. will be rewritten as follows:

Employees shall be provided copies of corrective action taken against them. A copy of such corrective action shall also be placed in the employee's personnel file within 14 days from the disciplinary action.

4. **Problem-Grievance Resolution Procedure, Policy 6.5.** The last sentence of the third paragraph in Section E, Level Three, will be revised as follows:

The university will provide the grievant and the authorized union representative with a written summary of the university's position, including prospective witnesses, within five (5) working days. . . .

After the phrase "authenticate proposed exhibits" in paragraph 3a of Section E, Arbitration, add the following phrase:

exchange witness lists.

5. **Holidays, Policy 5.1.** Any employee who lost unused holidays as the result of not using them before the end of the last full pay period in December, 2002, will receive payment for the lost holidays. The administration will make certain that employees are aware of the policy so that they can schedule the use of holidays that they have worked in order to avoid any further such cases.
6. **Safety and Security Department Protocols.** The Director of the department will request suggestions from the employees and then meet with the staff of the department, the union steward in the department, and the President and Vice President of Local 1477-01 to develop protocols for such issues as who is in

charge when police powers need to be exercised and replacing police officers when one is absent from work. An update will be provided at the July, 2003, Labor-Management meeting.

7. **Break Room in Northside Hall.** The Facilities Management administration and President of Local 1477-01 will continue to work together to find a suitable space for breaks as a replacement for the Green Room.
8. **Funerals, Policy 5.7.** Paragraph B. will be revised to provide for one occurrence in a calendar year.
9. **Overtime, Policy 2.15.** The last sentence of paragraph C.1.b. will be revised as follows:

Compensating time accumulations should not exceed 80 hours and should be used within six months of the date earned.

10. **Adverse Weather Conditions.** The HVAC systems will be left on in campus buildings. The administration will monitor the cost and effectiveness of this action.
11. **Union Time.** The provision contained in the minutes of the January 30, 1998, Labor-Management meeting will be made a part of this agreement. Namely, it is agreed that the union president will have one hour per day to be available to the represented SM employees in the AFSCME office. If the president is not able or available to be in the union office during the designated time, the vice president will perform this function. The union is to provide the administration with a schedule.
12. **Orientation of New Employees.** At the end of each Orientation Program for new employees, AFSCME Local 1477-01 will be given the opportunity to meet the new SM employees and provide them information about the union.
13. **Training of Employees.** Newly hired Service-Maintenance staff will normally be trained in the operation of equipment by the department's management including the General Supervisors. Equipment vendors are expected to conduct periodic training for existing employees.
14. **Joint Labor/Management Training.** The AFSCME District Council Representative and the South Bend Human Resources Director will select an individual or organization to provide joint labor/management training for the management and General Supervisors of the campus and the stewards and officers of Local 1477-01. A series of sessions which the university will pay for will be planned for the next several months to address such issues as the role of each and communications, with the goal of improving relationships.

15. **Health Care Plans.** Dan Rives, Associate Vice President for University Human Resource Services, will meet at least twice annually with campus administration and the officers of AFSCME Local 1477-01 to discuss issues regarding health care plans at South Bend. The first meeting will occur this summer.
16. **Shift Premiums, Policy 2.15.** The shift premiums in paragraph F.1. will be increased by one cent per hour to \$ .36 for regularly scheduled shifts that begin between 11:30 a.m. and 7:59 p.m. and \$ .46 for regularly scheduled shifts that begin between 8:00 p.m. and 3:59 a.m.
17. **Workweek Schedules for Custodians.** It is the intention of the university administration that the next two Custodian positions filled will be posted with a Tuesday through Saturday schedule. Current employees will be given the chance to choose these positions under the Shift Preference policy when they are posted. The current hourly, part-time employee will be moved to the Tuesday through Saturday schedule as an interim step.
18. **Parking Tags for Union Business.** When Service Maintenance employees begin working in the Ironwood Building, union officers who have purchased A tags will be given two hang tags that will enable them to park in spaces designated for university vehicles, except the space for the Chancellor's car, as the result of performing union business.
19. **Uniforms, Policy 2.9.** Revise paragraph C.3. as follows:

Safety and Security employees are responsible for the return of uniforms upon termination or when otherwise no longer needed. Other employees are not required to return their uniforms.

Add a new provision as paragraph C.5 in this policy:

Short pants are an acceptable part of the Facilities Management uniform except where safety concerns exist, such as with the handling of chemicals.
20. **Consultant Study of Facilities Management.** The university will ask the consultant who is reviewing Facilities Management operations to make recommendations to include staffing levels, management structure, including the ratio of supervisors to staff, and the efficiency of operations. A copy of the report will be given to the union and discussed in a labor-management meeting. Ultimately, it is up to the Chancellor to implement any recommendations of the consultant.
21. **Food Services Crew Leader.** The classification of Food Services Crew Leader has been established. The increased pay for the incumbent in this position will be retroactive to April 13, 2003, six weeks prior to May 25, 2003.



22. **Advertising Job Openings, Policy 2.6.** The following sentence will be added to paragraph A:

Once it is determined by the administration to fill a vacant position, it will promptly be posted for bid as provided herein.

23. **Attendance Program.** The attached attendance program will be implemented July 1, 2003. Application of the program will be based only on incidents after that date.

**SAFETY AND SECURITY DEPARTMENT**

**SECURITY AND PUBLIC SAFETY**

**SECURITY**  
PHYSICAL/FACILITY SECURITY  
PERSONNEL SECURITY  
INFORMATION SECURITY  
SECURITY CLEARANCES  
LOSS PREVENTION  
ACCESS CONTROL MANAGEMENT  
RISK MANAGEMENT  
LOST AND FOUND  
INVESTIGATIONS

**PUBLIC SAFETY**  
EDUCATION  
FIRE SAFETY  
OSHA MONITORING  
CRIME PREVENTION  
EMERGENCY RESPONSE  
LAW ENFORCEMENT  
CRIME REPORTING  
EMS SERVICES  
PERSONNEL ESCORTS  
PARKING ENFORCEMENT  
VEHICLE ASSISTS

**PARKING SERVICES**  
REGISTRATION  
MAINTENANCE  
ENFORCEMENT

**ENVIRONMENTAL HEALTH AND SAFETY**

**ENVIRONMENTAL HEALTH**  
HAZARDOUS WASTE DISPOSAL  
EMERGENCY SPILL RESONSE  
RIGHT TO KNOW SARA  
WATER QUALITY

**OSHA**  
PERSONAL PROTECTIVE EQUIPMENT  
EXPOSURE EVALUATION  
HAZARD COMMUNICATIONS  
MSDS DEPOSITORY  
LOCKOUT/TAGOUT  
ASBESTOS / LEAD MANAGEMENT  
RESPIRATORY PROGRAM  
BLOODBORNE PATHOGEN STANDARD

**FIRE PREVENTION AND LIFE SAFETY**  
FIRE EXTINGUISHER ASSESSMENT  
FIRE SAFETY TRAINING  
LIFE SAFETY TRAINING  
EMERGENCY PLANNING/COORDINATION

**RESEARCH SAFETY**  
NRC COMPLIANCE  
OSHA LABORATORY STANDARD  
SAFETY  
BIOHAZARD  
RADIATION  
CHEMICAL

**EH&S Yearly Report**  
**July 2002 – May 13<sup>th</sup> 2003**

**TRAINING**

<b>Program</b>	<b>Total</b>	<b>SASE</b>	<b>FM-Main</b>	<b>FM-Cus</b>	<b>CDC</b>	<b>SAC</b>	<b>Other</b>
Asbestos	11	1	10				
Bloodborne	76	21	10	31	14	-	
CPR/FA	94	42			36	16	
EAP	14						14
Fire Re/Ext	35	16	12				7
Hazcom	5	4		1			
Hazmat	12	12					

**ACTIVITIES/INSPECTIONS/PROBLEMS**

Control valves visually inspected	377
Flow alarms tested	61
False fire alarms	12
Fire panel troubles	8
Actual fires	1
Fire extinguishers inspected/maintained (289 total)	11
Hot work permits issued	14
Fire safety issues/planning	6
Lead testing (paint)	1
Indoor air quality complaints/asbestos issues	17
Safety showers/eye washes tested	18
Smoke detector sensitivity testing	169
Fume hood performance inspections	54
Fire drills	10
Elevator inspections	35
Risk Management/Fire Marshal inspections	5
Laboratory safety issues	7
Water quality (including stormwater development )	8
Waste disposal	11
Hepatitis B vaccinations	15
Needle stick injuries	1
Thermal imaging	1

Programs reviewed annually: Exposure Control Plan and Hazard Communication

Programs developed/revised/implemented: Emergency Action Plan, Crisis Communication Plan, Emergency Ops Plan, Elevator Fire Service Inspections, Asbestos Removal Protocol.

Programs researched to be developed: Confined Spaces, Hearing Protection, First Aid Policy, Lifting Techniques, Hazmat Awareness