

2012-2013

FINANCE AND ADMINISTRATION



ANNUAL REPORT AND ASSESSMENT UPDATE

2012-2013 FISCAL YEAR

VICE PRESIDENT FOR FINANCE AND ADMINISTRATION
STEPHEN A. SCHILLO

STATE UNIVERSITY OF NEW YORK AT FREDONIA



Vice President for Finance and Administration

December 18, 2013

To: The Campus Community

On behalf of the entire division, I'm pleased to present the 2012-2013 Finance and Administration Annual Report and Assessment Update. The Finance and Administration division is comprised of nine departments, which include 40 distinct operating units and 366 employees. This is the 16th year that this report has been issued. The purpose of the report is to provide an annual update to the campus on the operation of each of these units within the division, and to report on the various assessment activities that each unit has undertaken.

The strength of SUNY Fredonia and the Finance and Administration division continues to be the hard-working, dedicated employees that perform a wide range of services throughout the campus. For the past 11 years the Finance and Administration division has recognized individuals from within the division who have demonstrated a solid team effort in their everyday actions, an outstanding Fredonia service attitude, creativity and resourcefulness in improving services, and a positive attitude in working with students, faculty, and staff. The Outstanding Administrative Services Awards annually recognize outstanding performance within Finance and Administration. Awards are presented in the following five areas:

1. Secretarial/Clerical
2. Custodial Services
3. Professional Trades
4. FSA Operational Services
5. Professional Staff (FSA and University)

The front cover of the 2012-2013 Annual Report and Assessment Update features the winners of the 2013 Outstanding Administrative Services Awards. Beginning at the top left and going clockwise are:

Lori Johnson—Outstanding Administrative Services Award—Secretarial/Clerical

Lori has been employed at SUNY Fredonia since September 2005 when she began as a Keyboard Specialist 1. Lori resides in Sinclairville.

Jorge Rosa—Outstanding Administrative Services Award—Custodial Services

Jorge has been employed at SUNY Fredonia since August 1989 when he began in Custodial Services. He is currently a Cleaner in Hendrix Hall. Jorge is a resident of Dunkirk.



James Kuras—Outstanding Administrative Services Award—Professional Trades

James has been employed at SUNY Fredonia since May 1996, when he began in the Maintenance department. He is currently a General Mechanic in the Structural Trades unit. James resides in Dunkirk.

Millie Stanton—Outstanding Administrative Services Award—FSA Operational

Millie has been employed at SUNY Fredonia since January 1981. She currently works in the Centre Pointe Dining Services area of FSA. Millie is a resident of Dunkirk.

Lisa Marrano—Outstanding Administrative Services Award—Professional Staff

Lisa began her career at SUNY Fredonia in September 1983 as a Calculations Clerk 1. She is currently the Associate Director of Student Accounts. Lisa resides in Fredonia.

Thank you to everyone in the Finance and Administration division who contributed to the preparation of the 2012-2013 Annual Report and Assessment Update, and congratulations to all of the 2013 Outstanding Administrative Service Award winners. A summary of all the Outstanding Administrative Service Awards winners from the past 11 years is presented on the inside of the back cover of this report. The Administration division welcomes your comments and suggestions on the presentation and content of this annual report. We look forward to working with everyone throughout the University during the 2013-2014 academic year, and to continually assess and improve our delivery of services to the University.

Sincerely,

Stephen A. Schillo
Vice President for Finance and Administration

SUNY Fredonia
Finance and Administration

Annual Report and
Assessment Statement

July 1, 2012 – June 30, 2013

STATE UNIVERSITY OF NEW YORK AT FREDONIA

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

July 1, 2012 – June 30, 2013

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INTRODUCTION

This 2012-2013 edition of the ***Finance and Administration Annual Report and Assessment Update*** represents the 16th year that this report has been presented. The report is intended to provide an overview of the various services provided to the SUNY Fredonia campus, and an update of the status of assessment activity undertaken by each unit within the Finance and Administration Division.

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



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

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

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

A copy of the complete SUNY Fredonia Vision Statement is included in Appendix B.

The Finance and Administration Division is comprised of nine departments with 366 employees. A brief summary of the responsibilities of the nine departments included within the Finance and Administration Division is presented below.

1. Vice President for Finance and Administration

This department includes the Office of the Vice President for Finance and Administration. Responsibilities of this office include the overall supervision and coordination of various financial and administrative departments within the Division. This office also interfaces with the other divisions on the SUNY Fredonia campus, SUNY System Administration, and other New York State agencies including the SUNY Construction Fund, Dormitory Authority State of New York (DASNY), and the Office of the New York State Comptroller (OSC) (3.0 FTE Employees).

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

This department is responsible for all financial operations on campus. The unit consists of the offices of the Controller, which includes the functions of the offices of University Accounting,

Purchasing, Student Accounting and Revenue Accounting; the Budget function, and University Payroll Services (24.0 FTE Employees).

3. Environmental Health and Safety

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

4. Facilities Planning

This department is responsible for all major capital facilities project development, coordination, and oversight. The Facilities Planning Office serves as a liaison with the SUNY Construction Fund and the Dormitory Authority State of New York (DASNY) (3.0 FTE Employees).

5. Facilities Services

This department is responsible for all campus maintenance functions and many smaller sized construction projects. The department consists of the Facilities Services Office and nine units that include: Custodial Services, Structural Trades, Landscaping and Grounds, Plumbing Shop, Electrical Shop, Heating Services, Capital Projects and Energy Management, Refrigeration and Air Conditioning and Technical Services (139.75 FTE Employees).

6. Faculty Student Association (FSA)

The Faculty Student Association is responsible for providing auxiliary services to the University. This department consists of seven units that include: Faculty Student Association Corporate operations, Food Service operations, Bookstore operations, Human Resource services, Support Services operations, Information Technology services and Special Events, Marketing and Licensing services (179 Employees - this includes 81 full-time employees and 98 part-time employees).

7. Human Resources Office

This department is responsible for all employment related issues on campus. The department includes: employee relations, new employee orientation, employee benefits, Employee Assistance Program (EAP), position classification, SUNY Human Resources system, employee compensation, ethics compliance, workers' compensation and retirement counseling. (5.5 FTE Employees)

8. Internal Control

This department is responsible for campus compliance with New York State and SUNY Internal Control programs. This office also provides campus-wide training on internal controls, conducts internal controls reviews, coordinates freedom of information responses, and provides leadership and coordination of the campus TouchNet Marketplace (1.0 FTE Employees).

9. University Services

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

A summary of all staffing in the nine administration departments is presented below:

SUNY FREDONIA
Administrative Services
2012-2013 Departmental Staffing by Funding Source

Administrative Office	State	DIFR	IFR	FSA	Total
Finance and Administration	2.00		1.00		3.00
Environmental Health & Safety	1.60	0.80			2.40
Facilities Planning	1.00	2.60			3.60
Facilities Services	71.25	62.50	6.00		139.75
Faculty Student Association				179.00	179.00
Financial Services	19.00	2.00	3.00		24.00
Human Resources Office	4.50	1.00			5.50
Internal Control	1.00				1.00
University Services	8.00				8.00
	108.35	68.90	10.00	179.00	366.25

Note:

The FSA employment number includes 81 full time and 98 part time employees

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Finance and Administration

VICE PRESIDENT FOR FINANCE AND ADMINISTRATION

Introduction

The Vice President for Finance and Administration serves as the Chief Financial Officer on campus and supervises the Finance and Administration division. This division includes nine departments with 366 employees. The nine Administrative Departments included in this 2012-2013 annual report include:

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



Stephen A. Schillo

Mission Statement

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

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

Annual Report

Fiscal year 2012-2013 was a year of transition for SUNY Fredonia as well as for the Finance and Administration Division.

Dr. Virginia S. Horvath became Fredonia's 13th President in July 2012, replacing Dr. Dennis Hefner who led the university for 16 years. Dr. Horvath had served as Fredonia's Vice President for Academic Affairs for seven years prior to her inauguration as President.

In January 2013, Stephen Schillo was appointed Vice President for Finance and Administration replacing Karen R. Porpiglia who had served as the Division's Interim Vice President since 2010. The Division and the entire campus community owe its thanks to Mrs. Porpiglia, as well as Judy Langworthy, who served as Interim Associate Vice President, and Ann Aldrich who served as Interim Budget Director during these years of transition. Their exemplary service continues to set a high standard of professional service and dedication.

During the 2012-2013 fiscal year, the Vice President's office provided coordination and leadership across the Division. The accomplishments and initiatives of each operating area are summarized in the following sections of this report.

Assessment remains an important process throughout the Finance and Administration Division. The completion and publishing of this Annual Report reflects the Division's culture of assessment. Tracking measures of output, the use of benchmark data and customer surveys are also part of this discipline. During 2012-2013 Finance and Administration Directors explicitly mapped departmental activities and programs to the university's Baccalaureate Goals to evaluate departments' alignment and support of these important university-wide goals. The assessment activities of each department are also summarized in the following sections of this report. A review of these sections provides a good picture of the Division's accomplishments and assessments for 2012-2013.

Associate Vice President for Finance and Administration

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

ASSOCIATE VICE PRESIDENT FOR FINANCE AND ADMINISTRATION

Introduction

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

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



Karen Porpiglia

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

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

Mission Statement

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

Annual Report

The Associate Vice President for Finance and Administration is responsible for providing leadership and supervision for all campus financial operations, serving as liaison with SUNY System Administration financial offices, providing oversight for state and residential capital planning and projects, and representing the Finance and Administration Division in the absence of the Vice President.

During the first half of the 2012-2013 fiscal year, the Associate Vice President continued serving in the role of Interim Vice President for Administration, due to the November 2010 retirement of the former Vice President. Following the conclusion of a national search, a new Vice President for Finance and Administration was hired in January 2013, and the Interim Vice President returned to the Associate Vice President role.

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

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

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

Significant Accomplishments

- Successfully managed the 2012-2013 Operating Budget, closing the \$5.8 million gap with a combination of campus reserves, equipment funds, selected fees, salary savings and over-enrollment tuition dollars.
- The 17th edition of the Consolidated Operating Budget Book was prepared and a condensed version was posted to the Budget Office website providing an overview of the six components (State Operations, Residence Halls, Faculty Student Association, Income Fund Reimbursable [IFR], State University Tuition Reimbursable [SUTRA], Fredonia College Foundation), as well as planning assumptions and highlights.
- Coordinated the efforts of Facilities Planning, Facilities Services and the State University Construction Fund in administering the fifth and final year of the 2008-2013 five year Capital Plan. Work on several major state and residential projects was completed including:
 - \$1.7 million Rockefeller Arts Center Exterior Rehabilitation (roofing system)
 - \$13 million Williams Center Rehabilitation

- \$3.5 million Maytum Hall Rehabilitation Phase II and Phase III
- \$3.5 million LoGrasso Hall Exterior Rehabilitation
- \$5.0 million Electrical Distribution Upgrade
- \$3.5 million Domestic Water System Upgrade
- \$4.0 million Dods Hall Rehabilitation and Fitness Center
- \$2.3 million Field House Bleacher Replacement
- \$550 thousand Disney Hall Lobby Upgrade
- \$350 thousand Gregory Hall Stair Tower Replacement
- \$200 thousand Kirkland Complex Basement Structural Repairs
- \$200 thousand Mason Hall Basement Asbestos Abatement
- \$200 thousand Carnahan Jackson Center Chiller Piping Rehabilitation
- \$140 thousand Andrews Complex Lighting Rehabilitation
- Projects currently under construction include:
 - \$60 million Science Center
 - \$30 million Townhouse Residence Hall
- Major Projects currently in program study, design or bid phase include:
 - \$36 million Rockefeller Arts Center Addition
 - \$33 million Houghton Hall Renovation
 - \$1.2 million Andrews Complex Window Replacement – Igoe Hall
- Successfully coordinated the relocation of all Campus Life staff back into the newly renovated Williams Center
- Successfully coordinated the collective efforts of the Administration team, with the support of Information Technology staff, in relocating 16 departments and the cumulative belongings of 63 individuals from a variety of locations across the campus, back to the newly renovated Maytum Hall
- Provided budget and administrative assistance to the new campus president, Dr. Virginia Horvath, as she transitioned during the summer of 2012 from her former role as Vice President for Academic Affairs
- Assisted the new Vice President for Finance and Administration throughout the second half of the 2012-13 fiscal year with campus, SUNY and State fiscal policies, procedures and overall operations
- Continued service as President of the Faculty Student Association Board of Directors for the first half of the year
- Coordinated the initial campus implementation of Project Sunlight, a component of the Public Integrity Reform Act of 2011 that provides the public with an opportunity to view those entities and individuals (vendors, consultants, contractors) that are interacting with campus decision-makers
- Prepared the administration data and coordinated the collective efforts of Information Technology, Human Resources, Purchasing and University Services to compile and submit to System Administration the “Shared Services Initiatives Update”
- With the assistance of the Financial Analyst, compiled massive amounts of data within a two week timeframe in response to a System Office directive to complete a “Shared Services Campus Data Collection Survey.” Also referred to as the “McKinsey Study” (McKinsey & Company was engaged by System Administration) this was an attempt by

System to ensure that SUNY is making thoughtful and informed decisions in regard to strategic planning and transformational initiatives designed to meet and exceed students' expectations for seamless service beyond the boundary constraints of individual campuses

- Provided service to the community through active membership on the United Way of Northern Chautauqua County Board of Directors. Actively sought participation from the campus community in the annual United Way Week of Caring, providing service to a variety of not-for-profit organizations throughout the county
- Continued to serve as Chairperson of the Chautauqua County State Employees Federated Appeal (SEFA)

Assessment Update

Assessment Statement

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

Assessment Activities

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

The Associate Vice President provided leadership to the division, conducting regular staff and individual department head meetings to share information and guide the collective efforts of the team in accomplishing our goal of service excellence to the campus community.

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

Assessment Goals

- Provide clear and concise material for the Cabinet on financial forecasts, budget structure and use of campus reserves to relieve recurring deficits
- Assess the effects of flat state support, unfunded contractual salary increases, TAP-Gap requirements and fluctuating enrollment to provide accurate data in the development of the 2014-2015 operating budget
- Coordinate the efforts of the Administration division in responding to requests, implementing external mandates and the timely completion of reporting requirements received from the System Office, the State Comptroller, University Audit and the Construction Fund

- Closely track System and DOB efforts to exclude residence hall debt from the NYS Debt Cap; implement any resulting changes in methodology for remitting residence hall revenue, payment of debt service, and funding for existing and new reserve requirements
- Work with student affairs staff in developing future residence hall rental rates, and revenue and expenditure projections based on fluctuating residence hall occupancy and the anticipated opening of the new Townhouse complex in the fall of 2014
- Evaluate the effect of capital construction, critical maintenance and rehabilitation projects on campus operations, attempting to minimize disruptions to students, faculty and staff

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Budget Office

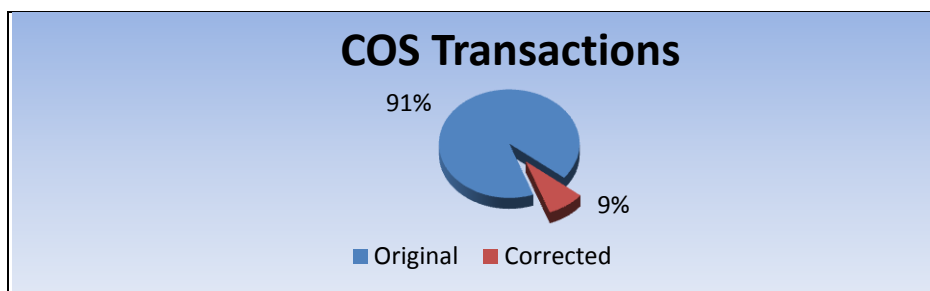
Annual Report

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



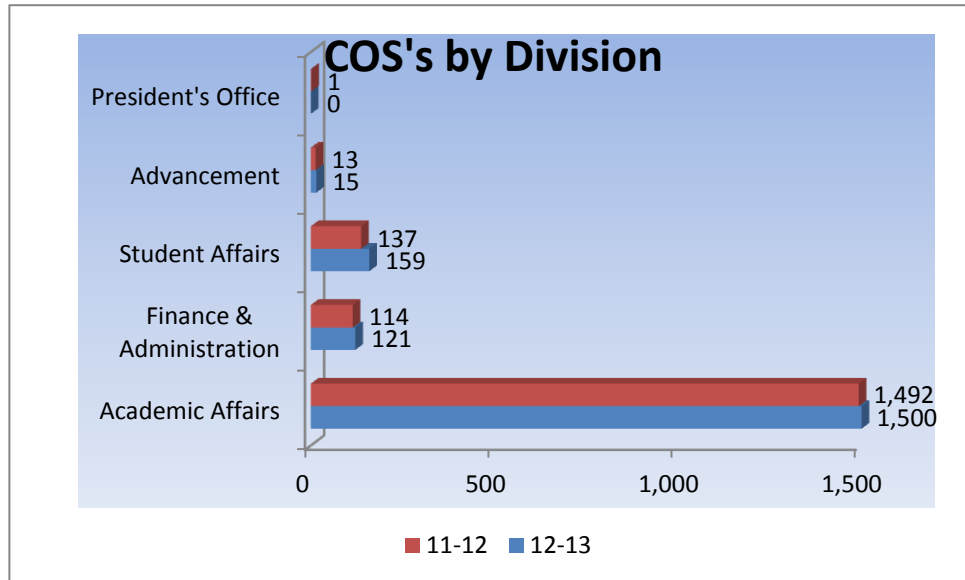
From left to right: Ann Aldrich and Rachael Coon

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



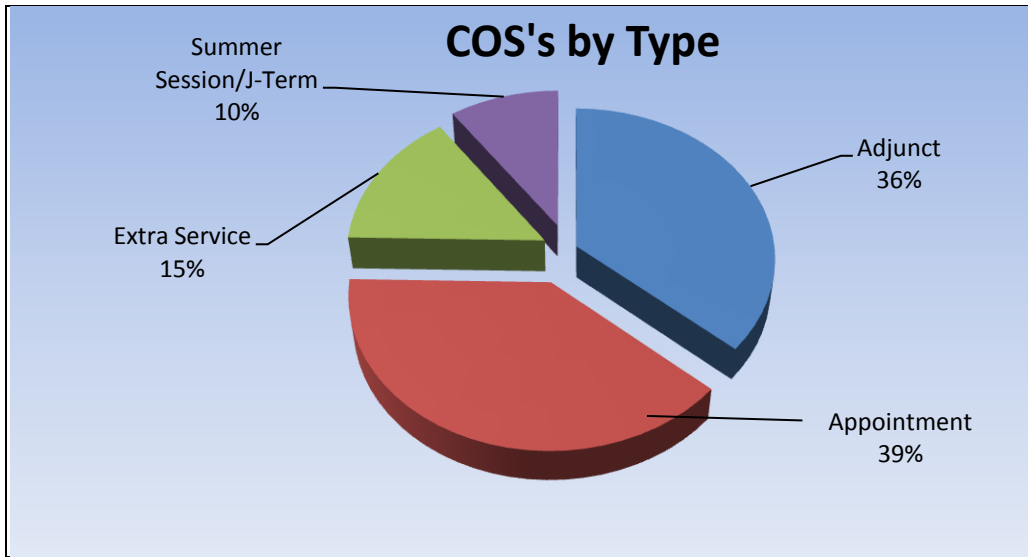
COS's Original/Corrected

Original	1,640
Corrected	155
Total	1,795



COS's by Division

Division	12-13	11-12
Academic Affairs	1,500	1,492
Finance & Administration	121	114
Student Affairs	159	137
Advancement	15	13
President's Office	0	1
Total	1,795	1,757



COS's by Type

Number of COS's by Type	
Adjunct	652
Appointment	700
Extra Service	268
Summer Session/J-Term	175
Total	1,795

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

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

The Budget Office is also responsible for monthly reconciliation of the Petty Cash bank account, and bi-weekly reconciliation of administrative and graduate assistant payroll. The Budget Office also maintains adjunct budget projections on a monthly basis.

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

Significant Accomplishments

- Worked in collaboration with administrative directors to develop the 2013-2014 Consolidated University Operating Budget
- Submitted Fredonia's FORM 1 spreadsheet detailing department level allocations used to populate the Financial Plan into the SUNY's accounting system
- Completed Fredonia's Campus Financial Management Strategies with collaborative efforts of the Vice President and the Associate Vice President for Finance and Administration
- Continued tracking the history of all lines and FTEs by department
- Processed 1,795 COS's, verifying funding and updating SUNY HR, the Payroll Distribution Management System (PDME), the comment section of the local HRMS clock tower database, and various internal spreadsheets
- Collaborated with COS Users Group to identify and implement enhancements to the COS Employee Action Form. Enhancements made in 2012-2013 include benefit eligibility tracking, and automatically populating fall semester salaries on the Spring COS's which were previously input manually
- The Budget Director served on the Mission Statement Revision Task Force which resulted in successfully reducing the mission statement from 423 words down to 31. The revised mission statement was approved by the University Senate and ratified by the campus
- Budget Director served on a search committee which resulted in the successful hire of a new Vice President for Finance and Administration
- The Budget Office worked with other Finance and Administration personnel in familiarizing the new Vice President with current campus and SUNY budgetary processes. Budget Office began developing and implementing budgetary changes envisioned by the new Vice President
- Worked with administration personnel to successfully utilize all state budget allocation in order to maximize state funding

Statistical Data

The SUNY Fredonia 2012-2013 Consolidated Operating Budget totaled \$103,412,925 representing an increase of \$4,378,996 (4.42%) from the 2011-2012 consolidated budget. Please refer to the following chart for comparative data for each of the six budget components.

Consolidated Budget Proposal

Components:	2012-2013	2011-2012	Change	Percent
University Operating Budget	\$48,143,900	\$ 47,241,600	\$902,300	1.91%
DIFR Budget	17,163,400	16,305,500	\$857,900	5.26%
FSA Budget	19,488,625	19,051,165	\$437,460	2.30%
IFR Budget	13,925,000	12,500,000	\$1,425,000	11.40%
SUTRA Budget	4,200,000	3,450,000	\$750,000	21.74%
College Foundation	492,000	485,664	\$6,336	1.30%
Total	\$103,412,925	\$99,033,929	\$4,378,996	4.42%

The 2012-2013 budget provided funding for approximately 903 FTE employees, including over 1,000 full and part-time employees, and over 1,000 part-time student workers. Please refer to the following chart for comparative data for each of the six budget components.

	2012-2013		2011-2012		Change	
	FTE Employees	Student Employees	FTE Employees	Student Employees	FTE Employees	Student Employees
University Operating	573.25	218.00	568.25	220.00	5.00	(2.00)
DIFR Budget	91.20	224.00	93.20	235.00	(2.00)	(11.00)
FSA Budget	202.00	350.00	189.00	340.00	13.00	10.00
IFR Budget	29.08	206.00	26.80	198.00	2.28	8.00
SUTRA Budget	3.80	0.00	3.80	0.00	0.00	0.00
College Foundation	3.50	4.00	3.50	4.00	0.00	0.00
Total	902.83	1,002.00	884.55	997.00	18.28	5.00

The student enrollment target remained at 5215 FTE, although actual enrollment Institutional Research was 5,476 FTE.

Assessment Update

Assessment Statement

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

Assessment Activities

The Consolidated University Operating Budget Book is generally published every year in its entirety prior to the spring meeting of the College Council. Due to not receiving all department narratives in a timely fashion, only a condensed version of the Consolidated Operating Budget Book was electronically published prior to the College Council meeting. It is anticipated that the full version of the 2013-2014 Budget Book will be available in October 2013.

The accuracy of the information in the Budget Book is verified after the passage of the New York State Budget and the issuance of the SUNY Financial Plan. Although the Budget Book

was not fully published online, budget estimates were completed in early May and the final Financial Plan Package was received from Albany in early July.

With the passage of the SUNY 2020 bill and a five year rational tuition plan, budget book tuition projections were in line with financial plan numbers. The University increased funded enrollment from 5,215 to 5,250 FTEs for the 2013-2014 budget cycle. Original Budget Book projections included a \$700,000 decrease in state funding (outside of tuition) in anticipation of System Administration writing off a \$75 million SUNY wide loan to Downstate Medical. The write off of this debt was delayed, and subsequently not in the 2013-2014 Financial Plan numbers.

The Consolidated University Operating Budget Book is a valuable resource document to the financial service units within Administration. The presentation with the narratives and pictures provides the consumer with more than “just the numbers”, by linking institutional priorities and divisional goals to the campus budget. The budget book development process did not see any major changes from the prior year.

An additional goal contained in last year’s Annual Report was that the COS team would continue to implement enhancements to the Online COS system as needed to meet the needs of end users. Enhancements that have been made include benefit eligibility tracking, and automatically populating fall semester salaries on the Spring COS, which were previously inputted manually. Recommendations were made by the COS Users Group to have the COS re-written to accommodate updates that can no longer be handled in a secure manner by the current system. A major benefit of the COS re-write would be the ability to track course releases (and associated costs) and to also automatically generate contract letters. Until the COS re-write becomes a reality, steps have been taken to develop an alternative solution to tracking course releases using existing features and making simple modifications to current dropdown lists.

The uncertainty of the COS rewrite outcome delayed the development of “COS Refresher” classes and publishing the COS Manual online until 2013-2014. The COS group wanted any new changes incorporated in these classes.

Enhancement to existing budgetary procedures for the 2012-2013 fiscal year (FY) included development of a new Cabinet budget item tracking spreadsheet. This spreadsheet tracked each budget item proposed with Cabinet approval dates and the financial impact on budgets. The spreadsheet also contained wish list and continued discussion items. Changes were also made to Cabinet’s budget outlook sheet to condense and simplify it for easy readability and understandability.

Development began on materials for Cabinet and the Planning and Budget Advisory Committee to educate and inform them regarding the SUNY Reserve Policy, Fredonia’s existing reserves, and five year budget projections.

With an Interim Provost in place during 2012-2013 and the anticipated hire of a new Provost in July 2013, an extensive detailed analysis of the adjunct budget was done. The analysis identified various cost components of the adjunct budget by department over a five year period. The analysis also provided graphs to easily ascertain trends in costs.

Collaboration efforts of networking with SUNY System Administration and other campuses continued throughout 2012-2013. The budget office has represented Fredonia in attendance at

Accounting, Budget, and Bursar (ABB) meetings; sessions on shared services; SUNY System Administration trainings and has participated in webinars and conference calls.

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

Assessment Goals

- Complete the 2014-2015 Consolidated University Operating Budget on schedule
- Continue to implement changes to the Budget Book as warranted
- Continue to implement enhancements to the Online COS system as needed to meet the needs of the end users and comply with System Administration modifications. Work in collaboration with IT staff to implement recommendations. Continue to advocate on behalf of the campus the need to re-write the COS to an updated language
- Test on the COS system, alternatives to tracking course releases. Rollout these changes in Spring 2014
- Upload the updated COS manual online and work in conjunction with members of the COS users group to develop and offer “COS Refresher” and/or training classes for any changes made
- Continue to collaborate with SUNY System Administration and various SUNY campuses to identify and implement “Best Practices” for fiscal operations
- Continue to evaluate and enhance any existing budgetary procedures or spreadsheets in order to provide information in a more effective and time saving manner
- Explore possibilities of using Business Intelligence for various reporting requirements
- Develop and maintain a five year budget forecast
- Develop materials to inform Cabinet, Planning & Budget Advisory Committee and the campus community on the five year budget forecast, financial reserves, and the “all funds” approach to budgeting
- Work with all divisions to implement an “all funds” approach to budgeting and possible cost saving measures
- Work in conjunction with Academic Affairs and Administration in the implementation of full funding of the adjunct budget. Analyze effects on current processes and the effect on the FORM 1
- Continue to provide sustainable and cost savings measures to coincide with the universities institutional priorities
- Participate and keep abreast of the Oracle Budget Project Study and analyze its feasibility and impact to current budget procedures on campus
- Work in conjunction with the Associate Vice President in monitoring and tracking new Residence Hall Capital Program and its effect on cash flow and revenue generation timing
- Continue to perform payroll and procurement card audits that were successfully transitioned from Internal Control into the Budget Office
- The Budget Director will serve a two year appointment on the Brand Investigation Committee and a three year ITAB term

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Payroll Services

Annual Report

The primary responsibility of the Payroll Services Office is to effect accurate and timely payment of salaries and wages to all faculty, staff and students who are paid from State Purpose Funds, Income Fund Reimbursable Funds (IFR), Dormitory Income Fund Reimbursable Funds (DIFR), State University Tuition Reimbursable Funds (SUTRA) or College Work Study Funds. Salaries and wages also include miscellaneous items such as overtime, inconvenience and holiday pay, lump sum payments and compensation for extra service and summer session. To effect these payments on the regular State Payroll,



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

Payroll Services is responsible for checking accuracy of information on the Change Of Status (COS) form such as salary, pay basis, position title and FTE percentage, anniversary date, appointment type and increment code for all state and graduate assistant employment. For Student Assistant and College Work Study, the Payroll Office verifies the accuracy of all appointment and new hire paper work establishes vacant lines for appointment, monitors appropriate rate increases and over-the-max rates, and processes retirement enrollment for student employees. The role of the Payroll Office actually begins prior to hire, continues in a variety of ways throughout employment and often continues even after separation from payroll due to resignation, retirement, graduation, etc.

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

- Assists with the completion of employment forms, such as employment eligibility, tax withholding, non-resident alien tax documentation, payroll deduction and direct deposit
- Completes employment verification requests for unemployment insurance and loan requests
- Processes applications for retirement plan enrollment
- Offers assistance regarding payroll procedures and schedules
- Prepares College Work Study reconciliation for completion of the Fiscal Operations Report and Application (FISAP)
- Administers Time and Attendance rules, procedures, and attendance records for all faculty, professional, Management/Confidential, and classified employees

The Payroll Office is staffed with a Director, a Payroll Examiner 2, a Payroll Assistant, and a Clerk 1. Student temporary service employees also provide assistance.

Significant Accomplishments

- Provided Student Payroll training to supervisors, secretaries, and resident directors
- Contributed and participated in New Hire Orientations for new faculty, graduate students, and residence hall directors
- Processed almost 1,800 COS forms for campus payroll transactions for state and graduate assistant employees
- Produced over 36,700 biweekly pay checks and direct deposits for state and student employees
- Implemented the on-line Time and Attendance System (TAS) developed by SUNY System Administration. To date, non-teaching UUP professional and M/C employees in three divisions have been trained and are using the new system. Implementation involves loading each employee's attendance balances and data prior to use of the system
- Introduction of an electronic version of the timesheet for the non-hourly campus CSEA, PEF, and PBANYS employees. This was accomplished in conjunction with the Accounting Office and has significantly reduced the need for the Payroll Office to purchase two-part carbon timesheets in an effort to be more sustainable, and have greater legibility and decreased errors with the timesheets
- Payroll continues to be an integral part in meetings and discussions with Budget, Finance and Administration, Human Resources, and Information Technology regarding the COS application. Several meetings took place this year to discuss the need for a COS rewrite. We reviewed components of the current COS and COS users group "wish list" to determine what enhancements could and could not be done as an update vs. a necessary rewrite. The Payroll Director continues to maintain the COS by managing user, department, hierarchy, and coding changes for this campus-wide application
- The Payroll Services website continues to be maintained and improved with current data and forms. Many of our online forms were changed to fillable PDF forms. All schedules, procedures, and forms are current
- Coordinated efforts again this year with Financial Aid and M&T Bank to provide one-stop access for student assistants and college work study student workers to complete paperwork, pick up work study referrals, and open banking accounts for direct deposit purposes
- Regular participation of the Payroll Director in quarterly Payroll Users Group web conferences with other SUNY and State agencies in an effort to remain abreast of current and future federal, state, and SUNY policies

Statistical Data

As a measure of accuracy in processing payrolls, previous annual reporting provided data regarding the number of late separations and late hires. This data is compiled by the Office of the State Comptroller (OSC) and ranks all SUNY campuses; it also provides for statewide ranking with other state agencies. Due to ongoing staffing and budgetary constraints, OSC has discontinued the production of the mid-year report card. Therefore, previously reported rankings of each SUNY campus are not available. However, OSC is able to report that in the ten years of measuring on-time performance, there have been improvements in both the on-time appointment and separation rates across the state agencies.

Corrective measures will continue to be taken to ensure departments are aware of, and adhere to the COS submission deadlines for timely processing of appointments, separations, and salary changes. The COS workflow revisions and campus-wide COS training currently being discussed with Payroll, Budget, Human Resources, and Academic Affairs will provide an opportunity for improved performance in these areas. COS forms received late directly affect the performance measures of separations, appointments, and overpayments.

Assessment Update

Assessment Statement

The Payroll Services unit provides accurate and timely payment of salaries and wages to all faculty, staff and students, and provides excellent customer service to all constituencies.

Assessment Activities

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

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

Assessment Goals

- Accurately process payrolls for faculty, staff and students
- Continue to provide training workshops and formalize feedback as to the effectiveness of the material presented
- Continue to assist with the new hire orientations and review evaluation forms to improve the effectiveness of the orientations
- Continue participation with the Online COS team to implement enhancements to the system as needed to meet the needs of the end users. Formalize feedback as to the effectiveness of the changes
- Strive to improve upon our late hires and post deadline submissions rankings by continuing to provide COS users with forthcoming processing deadlines. Extra reminders prior to larger payrolls at the beginning of each semester are provided to all COS users
- Complete conversion of UUP employees to the TAS on-line system
- Continue to implement enhancements to the Online COS system as needed to meet the needs of the end users and comply with System Administration modifications. Work in collaboration with IT staff to implement recommendations

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University Controller

Annual Report

The University Controller is responsible for providing leadership, coordination and supervision for the Purchasing, Student Accounting, and University Accounting Offices. During the first half of the fiscal year, the University Controller was in the role of Interim Associate Vice President for Administration overseeing the financial services unit. The Associate Vice President was in the role of Interim Vice President for Administration. In January 2013, a Vice President for Finance and Administration was hired and the University Controller and the Associate Vice President for Administration resumed their prior roles.

The University Controller works with the Associate Vice President for Finance and Administration to prepare and submit the annual campus revenue projections to System Administration. Revenue projections are comprised of tuition, fees and interest, based upon approved enrollment figures provided by the Office of Institutional Research. Initial revenue projections are typically prepared in mid-fall and serve as a starting point for preparation of the upcoming fiscal year campus operating budget. Finalized projections are submitted in the spring; updates to approved plans are required at the end of the third week (the official census date) of both the fall and spring semesters. Reconciliation of projected versus actual revenue is prepared on a monthly basis with variances plus or minus 5% from target requiring written explanation to System Administration Controller's Office.



Judy Langworthy

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

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

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

Additional responsibilities include coordination among faculty, department chairs, deans and vice presidents in the preparation and submission for approval of new course fees as well as requests for fee increases; various analyses related to the Income Fund Reimbursable accounts

(IFR), the Dormitory Income Fund Reimbursable accounts (DIFR) and the State University Tuition Reimbursable accounts (SUTRA); analysis of revenue requirements for state and residence hall-funded scholarships; oversight and direction of year-end fiscal closing procedures; service to the campus through committee work and participation in campus sponsored events.

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

Significant Accomplishments

- Worked with the Associate Vice President for Finance and Administration and the Offices of Budget, University Accounting, and Purchasing to assure that all records were completed and closed per System Administration deadlines without any lapsing of state funds
- Throughout year-end proceedings, all budgeted allocations were closely monitored; when and where appropriate, expenditures were transferred to alternate funds in order to optimize every budgeted dollar and provide roll-over funds to cover anticipated new-year shortfall
- Coordinated the successful passage of new course fees in the Sciences, Social Work, and Visual Arts & New Media, as well as securing course fee increases in Theatre and Dance
- Prepared detailed analysis of available funding and projections for new and current campus-based scholarship offerings
- Modified and administered the student fee survey to currently enrolled students. The results were summarized and reported to System Administration as a component of our Comprehensive Student Fee request
- Member of the search committee for the Provost and Vice President for Academic Affairs
- Attended Accounting/Budget/Bursar and SUBOA meetings and participated in conference calls
- Continue to serve on the SUNY Fredonia Federal Credit Union Board as secretary; serve as co-captain of the SUNY Fredonia Administration Team for the Relay for Life; serve on the Recruitment Committee for the Chautauqua Leadership Network; serve on the board of the Southwestern Chapter of the American Red Cross, and member of the Chautauqua County SEFA Committee.

Assessment Update

Assessment Statement

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

Assessment Activities

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

The Controller maintained close working relationships with the vice presidents, associate vice presidents, deans and directors providing instruction, guidance and analyses which is, in part, responsible for the sound financial condition of their respective accounts at fiscal year end.

The 2012-2013 academic year was the fourth full year for the e-Billing and e-Payment processes in the Office of Student Accounts. We continue to evaluate the effect of this methodology on accounts receivable. At June 30th, the fall receivables were slightly lower, \$94,558 for fall 2012 as compared to \$100,518 for fall 2011. However, the spring receivables at June 30th were significantly higher with a 43% increase from \$119,183 for spring 2012 to \$170,787 for spring 2013. Increased emphasis to the electronic process and payment plan options have been provided during the new student summer orientation program. Account receivable balances will continue to be monitored on a monthly basis.

Participation in the campus-based "Fredonia Installment Payment Plan" (FIPP) decreased in 2012-2013 to a total of 934 enrollees from 1,086 enrollees in 2011-2012, a 14% decrease. Payment plans were stated on the e-Billing and were also given additional emphasis at summer orientation sessions; participation rates will continue to be an area that is closely monitored.

The electronic advance deposit payments for both admission and room rental continue to increase. The electronic admission deposit increased 12% from 2011-2012. Electronic room rental deposits increased 16% from the prior year.

The mandatory use of Procurement Cards (P-Cards) for purchases under \$1,000 remains in effect. The dollar volume increased in 2012-2013 to \$2.9 million from \$2.7 million in 2011-2012, while the number of purchase orders decreased by 8.5% and the number of confirming requisitions remained steady. Efforts to further diminish the number of purchase orders and confirming requisitions will continue, as they cost considerably more to process than monthly P-Card payments.

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

All direct reports participated in their SUNY peer groups affording our campus with full representation at purchasing, student services, and accounting committee meetings. In addition, various staff attended the following: Minority and Women Business Enterprise (MWBE) training, COMTEC regarding TouchNet, and the year-end State University Business Officers Association (SUBOA) meeting, where the Director of University Accounting presented training on the new travel NETcard.

Assessment Goals

- Ensure that year-end accounting and purchasing procedures are completed and closed without any lapsing of state funds
- Continue to evaluate the effects of the TouchNet eBill and Payment Plan modules on account receivable balances, payment plan participation and advance deposit payments
- Continue to evaluate the implementation of the mandatory threshold for P-Card purchases under \$1,000
- Monitor cash flow, revenue, over-enrollment and reserves to ensure that all identified measures to fund the current budget shortfall are properly funded; provide accurate projections to be utilized in the preparation of the 2014-2015 operating budget

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Purchasing

Annual Report

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

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



From left to right: Donna Howlett, Shari Miller and Joan Schnur

The Purchasing staff advises departments of procedures for the use of preferred sources such as the Department of Correctional Services (CORCRAFT), New York State Industries for the Disabled (NYSID), Industries for the Blind of New York, Inc. (NYSIB), and Minority Women Business Enterprise (MWBE). Responsibilities also include the quoting of recruitment advertising, ensuring trademark and licensing procedures are followed, and dissemination of information from the Office of General Services (OGS) website for “P” contracts to the appropriate departments, as well as assisting in the formal bidding process with bid openings.

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

Significant Accomplishments

- Expedited purchase orders to ensure there were no lapsed funds at fiscal year end
- 151 procurement card holders with 8,631 transactions, totaled \$2,963,834.20
- Presented at the Administration Training Workshops in August of 2013
- Added/updated approximately 500 vendors in the Statewide Financial System (SFS)
- Purchasing Department employees attended various conferences and workshops during fiscal year 2012-2013 including the fall 2012 Secretarial/Clerical Conference; the Secretarial/Clerical Mini-Conference; the spring 2013 SUNY Purchasing and OGS Conference; and monthly Shared Services meetings

- Increased the frequency of procurement cardholder audits with the assistance of the Budget Office
- Purchasing Department staff have a presence in the SUNY Fredonia Credit Union Credit Committee, EAP Committee, The Chemical/Biological Safety Committee, Trademarks & Licensing Committee, SUNY/RF Procurement Team, SUNY Fredonia Sustainability Committee, Council for Women's Concerns Committee, Building Safety Committee, the campus Relay For Life team, two campus investment clubs, along with various community groups such as National Night Out Committee, Girl Scouts, and more

Statistical Data

- The SUNY MWBE goals for 2012-2013 are a combined 20%. However, the goals for MWBE commodities are 12% minority and 7% women business enterprises. SUNY Fredonia has been documented at over the 20% goal with our documentation showing 30.15% total for purchase orders. However, the accurate reporting of MWBE activity has been in question. We continue to work with System Administration, seeking a solution to capture all MWBE activity. Please refer to the following chart for comparative statistics noting that the last two years information has had errors.

MWBE Activity for Purchase Orders					
	2008-09 %	2009-10 %	2010-11 %	2011-12 %	2012-13 %
MBE	2.58	12.19	18.37	7.69	7.94
WBE	7.93	5.98	20.85	15.02	22.21
Total	10.51	18.17	39.22	22.71	30.15

Assessment Update

Assessment Statement

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

Assessment Activities

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

Training sessions are provided for online requisitioning and the use and administration of the procurement card to individuals and departments. The Purchasing Department also presents at

the annual Administration training day held in August. Upon request, the Purchasing staff is willing to provide departmental training. Evaluation forms were utilized at Administration training sessions to assess the necessity and the presentation style, as well as to obtain suggestions for improvements and possible future topics. As a result of this feedback, the Purchasing Office can target areas needing more emphasis at future presentations. Evaluation forms are also used at procurement card training sessions.

Assessment Goals

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

2012-2013
Purchasing Volume Report
July 2012 – June 2013

STATE	2012 - 2013 P.O.		2012- 2013		2012- 2013 CONFIRMING		Office Supply ON LINE		TOTAL/Office Supplies		New	CITIBANK VISA				
	VOLUME		PREPAYMENTS		REQUISITIONS		PURCHASES		P.O. s & REQUISITIONS		P-Card	2012-2013				
DATE	P.O.	AMOUNT	NO.	AMOUNT	NO.	AMOUNT	NO.	AMOUNT	NO.	AMOUNT	Holders	# of Trans	Amount			
JUL. 12	93	\$ 813,581.16	30	\$ 106,741.97	50	\$ 103,105.24	31	\$ 6,015.78	204	\$ 1,029,444.15	0	899	\$ 264,354.05			
AUG. 12	71	\$ 486,034.19	20	\$ 27,715.00	54	\$ 219,097.80	65	\$ 14,557.94	210	\$ 747,404.93	0	664	\$ 304,670.25			
SEPT. 12	43	\$ 401,552.91	21	\$ 114,893.00	55	\$ 98,538.48	72	\$ 9,682.92	191	\$ 624,667.31	1	879	\$ 305,135.36			
OCT. 12	44	\$ 555,556.15	6	\$ 8,153.25	42	\$ 117,534.02	71	\$ 9,678.84	163	\$ 690,922.26	0	770	\$ 270,750.42			
NOV. 12	44	\$ 724,912.67	5	\$ 11,710.00	44	\$ 218,865.83	45	\$ 5,123.15	138	\$ 960,611.65	0	770	\$ 197,288.73			
DEC. 12	34	\$ 322,168.86	3	\$ 24,850.00	44	\$ 90,721.09	46	\$ 7,834.48	127	\$ 445,574.43	0	435	\$ 142,056.76			
JAN. 13	33	\$ 311,047.18	6	\$ 330.00	38	\$ 74,434.73	67	\$ 10,881.51	144	\$ 396,693.42	4	728	\$ 276,405.41			
FEB. 13	49	\$ 166,310.26	20	\$ 4,180.00	34	\$ 139,610.79	53	\$ 8,104.69	156	\$ 318,205.74	1	725	\$ 274,114.53			
MAR. 13	58	\$ 322,143.90	8	\$ 9,977.64	42	\$ 107,109.39	58	\$ 8,765.79	166	\$ 447,996.72	0	675	\$ 208,744.88			
APR. 13	48	\$ 345,902.76	5	\$ 94,183.00	40	\$ 166,674.96	50	\$ 6,391.14	143	\$ 613,151.86	3	746	\$ 236,498.98			
MAY. 13	100	\$ 1,402,280.19	10	\$ 44,418.00	43	\$ 38,011.96	57	\$ 11,680.32	210	\$ 1,496,390.47	0	701	\$ 261,636.08			
JUN. 13	90	\$ 417,753.02	10	\$ 46,301.00	53	\$ 171,368.95	62	\$ 13,970.43	215	\$ 649,393.40	0	639	\$ 222,178.75			
YTD 12- 13	707	\$ 6,269,243.25	144	\$ 493,452.86	539	\$ 1,545,073.24	677	\$ 112,686.99	2,067	\$ 8,420,456.34	9	8,631	\$ 2,963,834.20			
YTD 11 - 12	773	\$ 5,224,551.39	154	\$ 163,170.12	539	\$ 1,451,281.21	680	\$ 110,751.79	2,146	\$ 6,949,754.51	9	9,650	\$ 2,769,472.68			
JUN. 13	90	\$ 417,753.02	10	\$ 46,301.00	53	\$ 171,368.95	62	\$ 13,970.43	215	\$ 649,393.40	0	639	\$ 222,178.75			
JUN. 12	109	\$ 542,069.73	10	\$ 6,422.00	55	\$ 214,317.11	46	\$ 10,869.82	220	\$ 773,678.66	3	902	\$ 265,914.22			
RESEARCH	2012- 2013		2012 - 2013		TOTAL		MWBE%	MWBE%	Vouchers Processed for 2012-2013							
DATE	P.O.	AMOUNT	Other Voucher Processing		Research		Purchasing		Campus		Quick Pay Vouchers		Petty Cash		TOTAL	
			NO.	AMOUNT	NO.	AMOUNT	MBE	WBE	MBE	WBE	NO.	AMOUNT	NO.	AMOUNT	NO	AMT
JUL. 12	1	\$ 14,001.00	162	\$ 31,587.84	163		8.60	1.91	2.70	1.15	322	\$ 2,309,192.98	0	\$ -	322	\$2,309,192.98
AUG. 12	6	\$ 4,698.78	74	\$ 66,361.23	80	\$ 71,060.01	15.10	29.23	14.86	11.89	419	\$ 2,902,422.58	0	\$ -	419	\$2,902,422.58
SEPT. 12	1	\$ 1,938.00	53	\$ 36,683.35	54	\$ 38,621.35	1.35	5.02	8.46	5.11	351	\$ 1,859,344.29	0	\$ -	351	\$1,859,344.29
OCT. 12	4	\$ 2,399.33	80	\$ 122,442.71	84	\$ 124,842.04	0	41.09	1.80	20.37	357	\$ 2,132,547.70	0	\$ -	357	\$2,132,547.70
NOV. 12	5	\$ 19,111.54	101	\$ 34,421.70	106	\$ 53,533.24	16.51	6.91	6.42	3.13	476	\$ 1,579,342.33	5	\$ 4,360.00	481	\$1,583,702.33
DEC. 12	0	\$ -	68	\$ 23,288.10	68	\$ 23,288.10	4.40	60.01	2.53	31.49	322	\$ 2,415,898.32	4	\$ 11,260.00	326	\$2,427,158.32
JAN. 13	3	\$ 1,634.00	94	\$ 102,729.18	97	\$ 104,363.18	23.02	6.75	6.75	7.32	396	\$ 1,849,801.52	0	\$ -	396	\$1,849,801.52
FEB. 13	9	\$ 10,578.69	158	\$ 69,121.10	167	\$ 79,699.79	0.0	12.37	0.00	14.17	333	\$ 1,840,043.47	1	\$ 3,864.00	334	\$1,843,907.47
MAR. 13	1	\$ 3,319.80	94	\$ 80,664.37	95	\$ 83,984.17	2.02	11.59	0.90	7.58	427	\$ 2,571,746.59	8	\$ 14,360.00	435	\$2,586,106.59
APR. 13	5	\$ 6,143.10	71	\$ 57,402.72	76	\$ 63,545.82	1.25	10.70	0.87	12.36	480	\$ 1,379,457.78	0	\$ -	480	\$1,379,457.78
MAY. 13	5	\$ 3,450.00	100	\$ 37,053.04	105	\$ 40,503.04	18.40	20.68	9.50	10.61	502	\$ 1,713,858.05	2	\$ 585.00	504	\$1,714,443.05
JUN. 13	6	\$ 38,637.00	176	\$ 56,097.39	182	\$ 94,734.39	4.63	60.24	1.33	15.25	490	\$ 2,364,664.50	0	\$ -	490	\$2,364,664.50
YTD 12 - 13	46	\$ 105,911.24	1,231	\$ 717,852.73	1,277	\$ 823,763.97	7.94	22.21	4.68	11.71	4,875	\$ 24,918,320.11	20	\$ 34,429.00	4,895	\$24,952,749.11
YTD 11 - 12	50	\$ 72,493.03	1,297	\$ 920,392.76	1,347	\$ 992,885.79	7.69	15.02	3.15	5.84	4,940	\$ 19,802,571.20	16	\$ 32,576.00	4,956	\$19,835,147.20
JUN. 13	6	\$ 38,637.00	176	\$ 56,097.39	182	\$ 94,734.39	4.63	60.24	1.33	15.25						
JUN. 12	3	\$ 2,226.60	89	\$ 77,458.65	92	\$ 79,685.25	2.67	11.27	7.91	16.33	665	\$ 1,051,601.13	2	\$ 970.00	667	\$1,052,571.13

2012 - 2013 STATE	\$ 8,420,456.34	2,067	12 - 13 TOTAL OF ALL STATE PURCHASES	\$ 11,384,290.54	10,698
2012 - 2013 RESEARCH	\$ 823,763.97	1,277			
2012 - 2013 VISA	\$ 2,963,834.20	8,631	12 - 13 STATE, RESEARCH, VISA	\$ 12,208,054.51	11,975
New "P"Card Holders	9		11 - 12 STATE, RESEARCH, VISA	\$ 10,712,112.98	13,143

Student Accounts

Annual Report

The Office of Student Accounts is committed to providing efficient, courteous service to the campus community with a friendly staff knowledgeable on federal, state, SUNY and campus regulations and policies. Responsibilities include accurately billing and collecting tuition and fee revenue for every registered student, distributing federal, state and private financial aid funds to individual student



From left to right: Mary Jo Rusch, Becky Siragusa, Lisa Marrano, Angie Astry, Pat Ippolito, Karen Begier, Debbie Desmond, Dana Berry, and Lynn Bowers

accounts, and appropriately refunding excess aid directly to the student or back into the financial aid program. In addition, Student Accounts disseminates information to the families of our students relevant to the Tax Relief Act of 1997 for the Lifetime Learning and American Opportunity Income Tax Credit, and provides information sessions at each of the Summer, Spring Into Fredonia, International Student, and Graduate Assistant Orientation programs.

Another responsibility of the Office of Student Accounts is the timely deposit of funds for all campus accounts - Income Fund Reimbursable (IFR), student and employee vehicle registration, parking violations, and summer athletic and professional camps. Work Study and Student Assistant paycheck distribution, and billing and collecting for employee long distance personal telephone calls also reside in this department.

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

The Office of Student Accounts is staffed with a Director, an Associate Director, a Revenue Accountant, an Administrative Aide, two full-time and two part-time Clerical employees, and a Secretary.

Significant Accomplishments

- Successfully transmitted the Tax Relief Act file to SUNY in a timely fashion
- Veterans Affairs and Post 911 benefit recipients continued to receive their funds in a timely fashion and we ensured that no duplicative benefits were received by these students
- Continue to certify TAP in a timely manner and properly certify students utilizing the two different SAP charts, dependent upon when they initially received TAP
- Changes to Federal regulations in 2012-2013 required us to disburse PELL earlier in the semester than we have done in the past. We cannot certify TAP until after the fourth week in the semester, so we needed to find a way to ensure that students that were not eligible for TAP did not receive refunds that they would later owe to us. We ran the TAP certification process in audit mode and then manually reviewed and voided refund checks for those students that were not eligible. Students now find out sooner and have the opportunity to find other alternatives if they need additional funds.
- The residency lawsuit continues and we have provided SUNY Legal with additional information throughout the year. We created a file in specified format with all students that paid out-of-state tuition rates from Fall 2007 to Spring 2011, for SUNY Legal to send the claims forms to. Since then, we have continually reviewed and verified or rejected any claims within the required time period.
- Continue to manage operations in the cashier's area with one less cashier as a result of a retirement
- The Director and Associate Director attended TouchNet's COMTEC conference in Kansas City, MO
- Successfully implemented and billed electronically for the 2012-2013 tuition increase
- The reconciliation of the PELL and Direct Lending accounts has been particularly challenging throughout the past year since the Statewide Financial System, Division of Budget, Office of the State Comptroller and Student Loan Service Center records were not in sync. We created reports, analyzed transactions, and worked closely with the Financial Aid Office to verify the accuracy of our records.
- Contracted with PEER Transfer to simplify the payment process for our international student population. Through PEER Transfer, a student is continually updated once they send their funds to them, in addition to receiving a better exchange rate and quicker processing of those funds than a traditional wire transfer. Students that have utilized the service have been very pleased by its simplicity and efficiency.
- We successfully implemented the Enrollment Confirmation Survey to all students for the Spring 2013 semester. The survey was a success with 5,132 students confirming enrollment, 24 stating they would not be in attendance and 45 did not complete the survey. We feel that the survey was a success and we gained very valuable data. We hope to enhance the survey in future semesters and utilize the negative responses. The Student Accounts Office is especially pleased as the State Finance Law Section 18 notification that we are required to serve students is included in this survey, so we received a record number of responses.
- IT enhanced the Parking database which significantly decreased the amount of time that is required to enter data into the system since the student, faculty or staff address is pre-populated and pulled from Banner. This setup enables us to verify the student's level of study to ensure they are receiving the proper sticker for their vehicle.

- The parking fine increase was successfully implemented, so individuals are assessed \$25 for the first violation and \$10 for the second.
- Working with University Services, we led the Western New York Region RFP for Collections. The contract hasn't been approved yet, but the group has evaluated all of the responses.
- Successfully completed our move to the third floor of Maytum Hall
- All URAS reporting deadlines were met and requirements were satisfied per System Office review
- Tested and implemented all relevant patches for the Banner Finance module
- Assisted with the continued implementation of TouchNet Marketplace stores, assuring that the financial data being fed into Banner for IFR accounts from the new stores is properly accounted
- Assisted with the continued implementation of Direct Loan Program to ensure that loan funds are accurately accounted for in the URAS system
- Produced the eleventh annual SUNY Fredonia Revenue Accounting/Student Accounts Report, a reference document of the financial data generated from these areas that includes appendices with historical statistical data
- Continued work on the Banner Procedure Manual for functions of Student Accounts and Revenue Accounting
- Submitted all Student Revenue Data Submissions (SRDS) in a timely manner for the Net Price Calculator
- Submitted all monthly Sales Tax returns in a timely manner
- Continued updating existing Excel spreadsheets that Revenue Accounting uses on a daily, biweekly, monthly, biannually, and yearly basis to increase operations and efficiencies

Statistical Data

The Office of Student Accounts produced over 19,290 bills for the Fall 2012 and Spring 2013 semesters, an increase of .21% from last year. All bills were sent electronically. The final bills for the fall and spring semesters are prepared manually, and no bills are generated for J-Term or summer sessions; therefore, no statistical data is available. Please refer to the following chart for statistical billing data.

SUNY Fredonia Bills

	2010-11		2011-12		2012-13	
	# Bills	Billed Amount	# Bills	Billed Amount	# Bills	Billed Amount
Fall						
Registration	5,300	\$32,223,868.86	5,471	\$32,223,868.86	5,080	\$30,292,169.85
Post Registration	2,671	16,928,527.78	2,615	17,231,788.74	2,508	15,897,442.12
Audit #1	1,525	10,022,493.62	1,279	8,614,324.56	1,622	11,203,437.54
Audit #2	1,208	8,200,880.04	1,030	7,297,299.40	1,298	9,699,754.76
Audit #3	468	3,065,907.43	441	3,118,882.66	478	3,648,494.74
Spring						
Registration	4,945	31,761,926.94	4,938	31,345,775.57	4,639	30,571,271.86
Post Registration	1,596	9,771,538.15	1,623	11,093,587.23	1,656	11,540,947.02
Audit #1	819	5,330,479.48	808	5,708,844.54	887	6,486,465.64
Audit #2	715	4,706,200.00	690	5,056,157.70	794	6,020,275.43
Audit #3	323	1,963,639.42	358	2,738,804.38	332	2,544,613.31
Total	19,570		19,253		19,294	

There were 3,562 students subscribing to the Faculty Student Association (FSA) Debit Account for the fall and spring semesters with a billable total of \$2,038,700, representing a 24.1% decrease in the number of subscribers and a decrease of 24.7% in dollar value.

The Student Accounts Office billed \$558,315 for laboratory and class fees for the 2012-2013 academic year, representing a decrease of 1.2% from the prior year.

Direct deposit of refunds directly into bank accounts totaled 1,324 for \$1,826,389, a decrease of 4.5% in number and an increase of 4.0% in dollar value.

A total of 9,162 credit card web payments were processed for a total of \$13,846,401. Since initial implementation in October 2003, \$65,459,057 of credit card payments have been processed via the web payment system. In addition, 2,710 WebCheck transactions were processed in the 2012-2013 year for a total of \$6,285,034. Please refer to the following charts for comparative data.

Web Credit Card Payments

Month	2008 - 2009	2009 - 2010	2010 - 2011	2011-12	2012-13
July	\$128,582.25	\$423,120.26	\$622,873.86	\$336,855.62	\$799,119.49
August	1,078,204.18	2,417,956.91	4,051,417.65	3,655,853.82	4,148,595.98
September	239,345.79	463,060.48	767,369.42	1,531,174.37	882,803.25
October	248,705.63	532,784.75	853,339.43	772,227.22	764,179.88
November	110,480.28	160,312.19	214,081.47	233,075.37	261,076.28
December	174,842.29	614,019.70	812,166.81	950,943.88	1,018,097.43
January	1,569,847.96	3,378,117.40	3,517,180.78	3,738,368.63	3,708,100.41
February	246,076.16	541,362.20	657,279.43	959,332.71	917,530.24
March	341,763.59	609,806.47	739,941.20	782,486.16	626,753.61
April	250,944.71	385,030.32	301,771.07	416,299.49	391,734.86
May	163,909.92	161,182.63	194,024.22	208,331.45	284,271.19
June	43,909.73	45,930.35	60,149.43	41,934.93	44,139.01
Total	\$4,596,612.49	\$9,732,683.66	\$12,791,594.77	\$13,626,883.65	\$13,846,401.63
Net Increase		111.74%	31.43%	6.53%	1.61%

Webcheck Payments

Month	2008 - 2009	2009 - 2010	2010 - 2011	2011-12	2012-13
July	\$10,692.02	\$159,158.74	\$336,634.40	\$134,304.12	\$391,329.31
August	239,467.01	890,333.03	1,506,857.79	1,773,146.40	1,680,246.27
September	47,895.73	200,797.70	338,163.56	590,959.34	523,124.48
October	36,378.16	252,062.12	391,113.41	368,283.07	413,191.79
November	33,619.40	78,157.04	135,518.16	112,270.68	193,285.32
December	26,052.65	229,251.45	384,890.13	373,489.77	520,914.26
January	207,574.54	1,281,577.35	1,361,612.07	1,523,281.79	1,559,625.55
February	59,948.89	206,937.99	280,539.60	458,403.45	391,188.39
March	60,117.91	275,227.45	382,906.85	318,081.73	301,261.13
April	63,889.85	130,336.25	142,909.79	160,309.68	218,794.76
May	18,174.90	57,272.24	66,891.64	70,150.83	77,332.87
June	31,885.60	9,647.40	26,415.00	21,299.58	14,740.74
Total	\$835,696.66	\$3,770,758.76	\$5,354,452.40	\$5,903,980.44	\$6,285,034.87
Net Increase		351.21%	42.00%	10.26%	6.45%

During the 2012-2013 fiscal year, \$103.2 million of collected revenue and \$29.5 million of cash disbursements were accounted for within the University Revenue Accounting System. These figures represent a 1.36% decrease in collections and a 3.80% decrease in cash disbursements from last year. Please refer to the following chart for comparative data.

CASH COLLECTIONS				
	2011-2012	2012-2013	Change	Percent
Tuition	\$32,335,756	\$32,971,983	\$636,227	1.97%
College Fee & Student Fees	8,611,915	8,749,376	137,461	1.60%
Campus Debit Card	2,666,539	2,003,329	(663,209)	-24.87%
Residence Hall Rental	16,669,798	16,311,342	(358,455)	-2.15%
Food Service	11,934,676	11,554,221	(380,455)	-3.19%
IFR Receipts	1,781,134	2,145,096	363,962	20.43%
Disbursements	30,637,029	29,473,272	(1,163,757)	-3.80%
Total	\$104,636,847	\$103,208,620	(\$1,428,227)	-1.36%

Assessment Update

Assessment Statement

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

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

Assessment Activities

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

Throughout the 2012-2013 year, Student Accounts worked closely with the Financial Aid Office to assist students with their current balance due in an attempt to reduce accounts receivable.

Although our survey numbers increased by one to seven responses, we would like to see a greater response. We hope to have the survey online when students are logging into "Your Connection" during peak times within the next year.

IT has adjusted the report that is generated with all students that graduate from a New York high school and have any non-resident tuition rate to include all of the non-resident codes.

Throughout the past year, we have worked closely with SUNY Legal Counsel to provide all that was needed for the Residency Lawsuit. We submitted the names and addresses of all students that paid non-resident tuition rates from Fall 2007 to Spring 2011, and then resubmitted them when they needed a new format for the vendor that was producing the mailing. When requested to do so by SUNY Legal Counsel, we immediately put the link providing the claim form and lawsuit information out on our Student Accounts web page. From there the claims started to be received and we responded very quickly to any responses that were uploaded for us to review. The response period continues until September 2013, so we expect to see a few more into next year.

We successfully completed the contract phase of the remote check, and have implemented the process into our daily work flow. We were able to discontinue the usage of Loomis Fargo for transporting our daily bank deposits and all checks are sent remotely to the bank now, while the cash is taken daily to a local branch. With this process, our checks are deposited quicker than in the past enabling us to utilize those funds sooner.

The Director and Associate Director of Student Accounts attended TouchNet's COMTEC in Kansas City, MO. At the conference, they gained valuable information regarding the functionality of the latest TouchNet 6.0 release, were able to speak with the development team about additional enhancements we would like to see, and learned about what will be coming in the next TouchNet release.

During the past year, we have worked closely with University Services as well as the Student Accounts representatives from Brockport, UB and Buffalo State to obtain and review the bids for the Collection Agency RFP. Our group has reviewed and ranked the bids, and we await University Services to complete the contract.

The Student Accounts Office has worked closely with the Registrar's Office, Financial Aid, Student Affairs, FSA, Institutional Research, Residence Life, IT, and Admissions on the implementation of an Enrollment Confirmation survey which was implemented in Spring 2013. The survey was a success with over 99% of our student population completing the survey. This enabled us to obtain valuable data about what students were and weren't in attendance, as some told us that they wouldn't be attending. The Student Accounts Office is particularly pleased with the response rate because part of the confirmation is the State Finance Law Section 18 notification that students are required to be served notifying them that they will be sent for collections if they don't pay and that the collections costs can be passed onto them. Prior to this, the survey was served electronically as well when the student passed from Your Connection to TouchNet, and we never received this high of a response rate. This will simplify our process when sending accounts to collections at the end of the semester.

The Student Accounts Office continues to work with IT on the implementation of the SUNY Business Intelligence Initiative. The project is slowly moving forward and we anticipate it will be implemented within the next couple of years. This tool will enable the creation of new reporting possibilities, and the interactive capabilities it promises should prove extremely useful.

All 2012-2013 URAS biannual reports, as well as the annual report, were submitted to System Administration prior to the due date. Fredonia's designated campus analyst reviewed each report and issued unqualified acceptance letters for all reports as well as the annual report. This

is one of the factors contributing to the good reputation that the campus has within System Administration operations which has permitted us to submit reports biannually instead of quarterly as we had done in previous years.

Revenue distributions were remitted biweekly on time to System Administration throughout the entire fiscal year and all monthly revenue targets were met. Campus departmental accounts were credited with their revenue collections on a timely basis.

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

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

Our records are being reconciled with the Attorney General's records for accuracy as needed. Graduate Assistantship records are also being reconciled for accuracy throughout the year.

The continued development of TouchNet Marketplace stores for the online collection of a wide variety of payments continues to lead to a drastic increase in the dollar value of electronic receipts. Anticipating an increase in the cost of our banking services, a method for tracking and analyzing monthly credit card merchant charges was initiated. Compared to the previous year, merchant charges increased 7%; charges for all other banking services increased 10% (please refer to the following chart). This information is critical in securing sufficient funding from System Administration to adequately cover our banking services. All bank statements are also reconciled on a monthly basis to assure the bank records agree with the campus records.

Credit Card Merchant Charges				
Comparison Year-to-Date as of June 30, 2013				
Fiscal Year 2012-2013 Compared to 2011-2012				
	2012/2013	2011/2012	Inc/Dec	% Inc/Dec
CASHIERS	\$ 62,895.43	\$ 55,112.50	\$ 7,782.93	14%
INTERNET	314,478.37	298,182.95	16,295.42	5%
INTERNET INCUBATOR	996.44	381.22	615.22	161%
INTERNET MARKETPLACE	6,907.16	7,060.92	(153.76)	-2%
INT MARKETPLACE ADVAN.	2,203.39	1,122.03	1,081.36	96%
FREDONIA BOX OFFICE	7,047.26	5,065.73	1,981.53	39%
TOTAL	\$ 394,528.05	\$ 366,925.35	\$ 27,602.70	8%

Bank Invoice Charges Comparison Years 2012-2013 and 2011-2012				
	2012/2013	2011/2012	Inc/Dec	Percentage Inc/Dec
July	\$ 1,161.59	\$ 1,016.50	\$ 145.09	14%
August	1,801.17	1,470.25	330.92	23%
September	2,661.61	2,922.90	(261.29)	-9%
October	2,930.31	2,401.04	529.27	22%
November	1,591.34	1,466.51	124.83	9%
December	1,483.67	1,263.32	220.35	17%
January	2,016.21	1,529.37	486.84	32%
February	2,968.88	3,262.09	(293.21)	-9%
March	2,001.26	1,919.51	81.75	4%
April	1,592.08	1,397.04	195.04	14%
May	1,321.94	1,128.60	193.34	17%
June	1,278.54	1,000.61	277.93	28%
TOTAL	\$22,808.60	\$ 20,777.74	\$ 2,030.86	10%

Assessment Goals

- Remain abreast of continually changing federal, state and SUNY policies to ensure continued compliance with applicable rules and regulations
- Continually seek to improve our business practices so as to maintain or reduce our current level of student account receivables
- Increase the number of customer satisfaction surveys received by the office
- As SUNY Legal Counsel notifies all non-resident students of the class action lawsuit against SUNY and students respond, we will need to determine if they meet the criteria and are eligible for a refund. Once this phase is complete, SUNY will refund the students and bill us for the tuition difference, interest, and attorney fees
- Attend TouchNet's Straight Talk in October 2013
- Work with the Director of University Services and other SUNY schools in our region to complete an RFP for the Collection Agency as our current contract has expired
- Continue to work with key members across campus to enhance the Enrollment Confirmation process and determine the best way to utilize the information that is obtained
- Work with Internal Control and University Services on an RFP for an eBill, ePayment, and Marketplace solution
- Work with Financial Aid, IT, Lifelong Learning and the Registrar's Office to simplify and minimize the dropping of classes for our J-Term and Summer Session population that does not pay
- Work with IT on the next phase of the Parking Database improvements to include the ability to register and pay online

- Continue working with IT staff on the forthcoming implementation of the SUNY Business Intelligence Initiative and the potential positive impact allowing for the creation of a user-friendly Student Accounts portal
- Continue monitoring the accuracy and timeliness of the URAS reports
- Continue monitoring the accuracy and timeliness of the biweekly revenue distributions
- Continue monitoring the monthly statement of bank and merchant charges for accuracy
- Continue reconciling the bank statement on a monthly basis to assure bank records and campus records agree
- Continue testing all Banner Finance and related Banner Student Modules
- Continue submitting the Student Revenue Data Submission two times per year
- Continue reconciling our records with the Attorney General's record for accuracy as needed
- Continue notifying students more frequently for old un-cashed checks
- Reconcile the Grad Assistantship records for accuracy
- Send dormitory funds to Tax & Finance biweekly

University Accounting

Annual Report

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



From left to right: Evelyn Fintzel, Sandy Noble and Cindy Haase

The University Accounting Office also processes all Research Foundation award payments. The expenses, governed by award stipulations, include purchases of office supplies, furniture, utilities, travel expenses and reimbursements, independent contractor payments, rent and lease payments, event (cultural outings) payments, and student stipends. The University Accounting Office also updates the SUNY-wide EnergyCap software program with Fredonia's monthly utility information which is used for analysis and reporting.

Monthly recharge accounting data is analyzed, tallied and summarized by account code, and input into the Central Accounting system to accurately recharge every department for the dollar value of services consumed. Recharge services include Verizon long distance telephone calls, personal and business photocopying, campus Copy Center service, postage, storehouse inventory and state fleet automobile usage.

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

On a monthly basis, departmental accounting reports are prepared summarizing allocation, revenue, cash balance, and encumbrance and expenditure information for State, Income Fund Reimbursable (IFR), and Dormitory Income Fund Reimbursable (DIFR) accounts. Reviewed in detail by the financial services directors, summary findings and recommendations are documented and then distributed with the reports to the vice presidents, associate vice presidents and deans in Academic Affairs, Student Affairs, and University Advancement. Beginning with the 2013-2014 fiscal year, departmental accounting reports will also be prepared for the division of Engagement and Economic Development.

A monthly construction fund account report is also prepared and reviewed summarizing allocation, encumbrance and expenditure information. State and DIFR utility expenditures are

monitored against budget to detect unanticipated dollar swings that might necessitate modifications to the planned allocation of resources.

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

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

In the first 4 months of the 2012-2013 fiscal year, the University Accounting Office was staffed by the Director of University Accounting, an Administrative Aide, and two Clerk 2's. After a well-deserved retirement of one staff member, the University Accounting Office is staffed by the Director, an Administrative Aide, and one Clerk 2.

Significant Accomplishments

- The University Accounting Office continues to lead the campus through the many challenging procedural changes caused by the implementation of the Office of the State Comptroller's (OSC) Statewide Financial System (SFS) on April 15, 2012
- Accounting records for the 2012-2013 fiscal year were completed and closed per System Administration deadlines without any lapsing state funds
- The Director of University Accounting conducted campus-wide training sessions for the SMRT Web Application for reviewing online departmental accounting information
- The Office of the State Comptroller (OSC) continued granting our campus University Accounting Office the ability to delete inaccurate and/or suspended vouchers
- OSC continued to consider SUNY Fredonia as a "low risk" status, which permits the Quick Pay expenditure level to \$999,999.99
- The University Accounting Office's "Green" program included eliminating duplicate NCR Travel Authorization Forms and scanning in all invoices sent out to the campus
- The University Accounting Office continued to inform the campus of updates regarding the state travel policy and gave Best Practice travel tips at a training seminar
- The University Accounting Office continually updates their webpage with new procedures and forms, providing departments easy access to the most current information

Statistical Data

- Throughout the 2012-2013 fiscal year, 4,875 state vouchers were processed for payment totaling over \$24.9 million, and 20 petty cash checks were issued at a total dollar value of \$34.4 thousand (please refer to the chart below for transaction detail). Compared to last year, these figures represent a 10.5% decrease in the number of state vouchers processed with a 10.3% increase in the dollar value of state voucher payments. In regards to petty cash, the number of vouchers processed increased by 25%, with the dollar value increasing by 5.6%, though the overall petty cash usage is

low. The decrease in state vouchers processed and the low petty cash volume can be attributed to increased campus procurement card usage.

Please note that in April 2012, SUNY agencies were no longer required to pay any invoices as a standard voucher, but requested to process as a quick pay.

Vouchers Processed for 2012-2013										
Month	Standard Vouchers			Quick Pay			Petty Cash		Totals	
	# of Vouchers	\$	Ave. MIR to Payment Days	# of Vouchers	\$	Ave. MIR to Payment Days	# of Checks	\$	# of Transactions	\$
July	0	-	-	322	2,309,192.98	-	0	-	322	2,309,192.98
August	0	-	-	419	2,902,422.58	-	0	-	419	2,902,422.58
September	0	-	-	351	1,859,344.29	-	0	-	351	1,859,344.29
October	0	-	-	357	2,132,547.70	-	0	-	357	2,132,547.70
November	0	-	-	476	1,579,342.33	-	5	4,360.00	481	1,583,702.33
December	0	-	-	322	2,415,898.32	-	4	11,260.00	326	2,427,158.32
January	0	-	-	396	1,849,801.52	-	0	-	396	1,849,801.52
February	0	-	-	333	1,840,043.47	-	1	3,864.00	334	1,843,907.47
March	0	-	-	427	2,571,746.59	-	8	14,360.00	435	2,586,106.59
April	0	-	-	480	1,379,457.78	-	0	-	480	1,379,457.78
May	0	-	-	502	1,713,858.05	-	2	585.00	504	1,714,443.05
June	0	-	-	490	2,364,664.50	-	0	-	490	2,364,664.50
Total	-	-	-	4,875	24,918,320.11	-	20	34,429.00	4,895	24,952,749.11
Average	-	-	0.00	406	2,076,526.68	0.00	2	2,869.08	408	2,079,395.76

Vouchers Processed for 2011-2012										
Month	Standard Vouchers			Quick Pay			Petty Cash		Totals	
	# of Vouchers	\$	Ave. MIR to Payment Days	# of Vouchers	\$	Ave. MIR to Payment Days	# of Checks	\$	# of Transactions	\$
July	1	7.63	9	476	2,025,191.03	7	0	-	477	2,025,198.66
August	1	474.07	7	432	2,257,996.74	6	1	3,000.00	434	2,261,470.81
September	3	3,000.00	10	396	2,337,427.19	5	0	-	399	2,340,427.19
October	2	3,159.21	8	337	1,914,911.40	4	0	-	339	1,918,070.61
November	2	2,433.17	8	547	1,681,124.86	5	4	4,103.00	553	1,687,661.03
December	1	3,361.00	8	443	1,461,880.83	5	2	11,000.00	446	1,476,241.83
January	0	-	0	419	2,164,359.30	5	0	-	419	2,164,359.30
February	2	11,324.79	9	364	1,538,088.61	4	7	13,503.00	373	1,562,916.40
March	1	3,401.23	8	584	2,669,935.99	5	0	-	585	2,673,337.22
April	0	-	-	264	672,893.02	-	0	-	264	672,893.02
May	0	-	-	665	1,051,601.13	-	2	970.00	667	1,052,571.13
June	0	-	-	512	2,806,607.82	-	0	-	512	2,806,607.82
Total	13	27,161.10	-	5,439	22,582,017.92	-	16	32,576.00	5,468	22,641,755.02
Average	1	2,263.43	7.44	453	1,881,834.83	5.11	1	2,714.67	456	1,886,812.92

New Travel Cards were issued to the President and the Vice President for Academic Affairs. There was a 2.3% increase in total Travel Card usage and a 2.1% increase in the use of the Corporate travel card through the Central Travel Account (CTA).

SUNY FREDONIA Citibank Travel Card Usage 2012-2013													
Statement Date	Athletics	Int'l Ed	CTA	President	VPAA	Admissions	Page & Stage	Music	LLL	Other Funds			Statement Total
										Research	Foundation	FSA	
7/22/2012	\$ 1,667.66	\$ (237.83)	\$ 1,473.19	\$ 1,936.77	\$ 1,378.60	\$ (1.30)			\$ 3,173.58	\$ 12.53			\$ 9,403.20
8/22/2012	\$ 7,848.12	\$ 1,064.34	\$ 3,355.80	\$ 1,376.00	\$ 128.00	\$ 760.80			\$ 175.08				\$ 14,708.14
9/22/2012	\$ 22,872.33	\$ 1,746.70	\$ 8,973.30	\$ 134.47	\$ 650.00	\$ 308.95						\$ 543.03	\$ 35,228.78
10/22/2012	\$ 28,429.06	\$ 3,948.54	\$ 5,082.68	\$ 35.00	\$ 855.59	\$ 5,605.85							\$ 43,956.72
11/22/2012	\$ 28,975.22	\$ 37,729.19	\$ 5,681.51	\$ 98.00	\$ 347.00	\$ 5,031.18							\$ 77,862.10
12/22/2012	\$ 31,153.42	\$ 32,043.69	\$ 7,766.22	\$ 500.00	\$ 89.00	\$ 822.67				\$ 1,794.17			\$ 74,169.17
1/22/2013	\$ 26,188.52	\$ 25,736.12	\$ 3,229.80	\$ 819.03						\$ 961.35	\$ 157.45		\$ 57,092.27
2/22/2013	\$ 53,836.46	\$ 9,824.24	\$ 8,065.20	\$ 116.50						\$ 237.35	\$ 367.55	\$ 482.25	\$ 72,929.55
3/22/2013	\$ 25,354.95	\$ 45,590.97	\$ 20,425.73	\$ 1,540.14		\$ 153.54		\$ 7,889.78				\$ 62.28	\$ 101,017.39
4/22/2013	\$ 47,397.29	\$ 14,106.70	\$ 5,391.47	\$ 4,608.98		\$ 57.70		\$ 2,352.00		\$ 290.45			\$ 74,204.59
5/22/2013	\$ 23,626.34	\$ 27,692.63	\$ 7,368.80	\$ 124.90	\$ 610.00	\$ 3,964.28				\$ 861.90	\$ 6,605.75	\$ 300.00	\$ 71,154.60
6/22/2013	\$ 4,412.09	\$ 29,491.01	\$ 2,888.48	\$ 308.10	\$ 646.13	\$ 422.02				\$ 548.80		\$ 104.00	\$ 38,820.63
Usage	\$301,761.46	\$228,736.30	\$ 79,702.18	\$ 11,597.89	\$ 4,704.32	\$ 17,125.69	\$ -	\$10,241.78	\$ 3,348.66	\$ 4,706.55	\$ 7,130.75	\$1,491.56	\$ 663,313.85

SUNY FREDONIA Citibank Travel Card Usage 2011-2012													
Statement Date	Athletics	Int'l Ed	CTA	President	VPAA	Admissions	Page & Stage	Music	LLL	Other Funds			Statement Total
										Research	Foundation	FSA	
7/22/2011	\$ 1,948.00	\$ 285.54	\$ 5,591.76										\$ 7,825.30
8/22/2011	\$ 6,686.50	\$ 358.80	\$ -										\$ 7,045.30
9/22/2011	\$ 26,112.25	\$ 3,345.63	\$ 8,506.50							\$ 610.52			\$ 38,574.90
10/22/2011	\$ 24,290.94	\$ 3,903.34	\$ 2,555.12			\$ 691.81				\$ 418.81			\$ 31,860.02
11/22/2011	\$ 33,598.02	\$ 1,457.56	\$ 6,422.28			\$ 4,972.04							\$ 46,449.90
12/22/2011	\$ 40,819.10	\$ 57,552.63	\$ 2,972.64							\$ 1,041.39			\$ 102,385.76
1/22/2012	\$ 30,595.52	\$ 2,435.61	\$ 5,840.41								\$ 564.20		\$ 39,435.74
2/22/2012	\$ 52,231.66	\$ 3,325.39	\$ 6,626.15							\$ 317.53			\$ 62,500.73
3/22/2012	\$ 39,512.15	\$ 12,305.82	\$ 8,323.91			\$ 94.00	\$ 1,308.00	\$ 7,841.79		\$ 321.53		\$ 287.88	\$ 69,995.08
4/22/2012	\$ 26,147.57	\$ 5,523.52	\$ 6,248.16			\$ 8.00				\$ 650.53		\$ 308.00	\$ 38,885.78
5/22/2012	\$ 22,763.26	\$ 25,779.85	\$ 20,224.95			\$ 2,232.77	\$ 2,299.00		\$ 2,285.00	\$ 627.46	\$ 5,985.00		\$ 82,197.29
6/22/2012	\$ 6,866.97	\$ 7,452.47	\$ 4,535.30			\$ 1,449.72			\$ 6,252.50				\$ 26,556.96
Usage	\$311,571.94	\$123,726.16	\$ 77,847.18	\$ -	\$ -	\$ 9,448.34	\$ 3,607.00	\$ 7,841.79	\$ 8,537.50	\$ 3,987.77	\$ 6,549.20	\$ 595.88	\$ 546,479.47

Assessment Update

Assessment Statement

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

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

Assessment Activities

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

The Central Accounting System, used when inputting voucher payment information, is equipped with edits to aid in the detection of duplicate invoices. Duplicate invoice warnings are immediately researched and resolved. There was one duplicate payment in the 2012-2013 fiscal year due to a procurement cardholder processing a credit card payment as well as the purchase order being paid. There were five payments issued through the Central Accounting System that resulted in Refunds of Appropriation (as compared to seven in 2011-2012). The five refunds encompassed the following: One mentioned above was a duplicate payment of a Purchase order due to a procurement cardholder processing a credit card payment, one was an incorrect Vendor ID recorded on a Requisition, one was a canceled maintenance agreement, one was an overpayment on a contract, and one was an overpayment due to use of Other Funds. As referenced above, refunds of appropriations were processed to restore funding in the appropriate accounts. As a means to reduce the risk of duplicate payments, departments are encouraged to use purchase orders or University procurement cards to obtain goods and services, as opposed to making a personal payment and subsequently filing a confirming requisition to obtain a reimbursement.

At every campus-wide training session offered for Travel and SMRT Web, evaluation forms were utilized to assess their content and presentation, obtain suggestions for improvements, and possible future topics. As a result of this feedback, the University Accounting Office targeted areas needing more emphasis at future presentations, and maintained “**Green**” in 2012-2013 by not printing and distributing the large annual Training information. Instead, participants were directed to University Accounting’s website. The department also discontinued the use of the NCR 2-page Travel Authorization Form. A single-page form is now available on-line.

Assessment Goals

- Continue to pay vendors in a timely manner to avoid costly interest penalties
- Continue to closely monitor for duplicate invoice payments
- Continue to be an integral member of the OSC statewide SFS implementation
- Continue participation in the Business Intelligence Taskforce
- Continue to utilize evaluation forms at all training workshops and incorporate viable suggestions into future sessions
- Continue training workshops to assist departmental personnel in understanding the budget and accounting systems, and the proper completion of related paperwork
- Continue the *Quarterly LORE* newsletter, giving departments up to date information and helpful reminders
- Continue to add procedures, forms, training packets, newsletter, and training presentations to the webpage, allowing departments easy access to the most current information

- Scrutinize the current travel procedure for possible improvements and reduction in paper consumption associated with travel
- Maintain or improve our rating for timeliness of payments as per the OSC performance report (provided OSC makes the report available again)

Environmental Health and Safety

ENVIRONMENTAL HEALTH AND SAFETY

Introduction

The Environmental Health and Safety Department (EH&S) is responsible for university campus-wide safety and compliance with federal, state, and local environmental and occupational safety regulations. The department is also ultimately responsible for fire safety, emergency planning and compliance issues relating to SUNY and the NYS Uniform Building and Fire Code. In addition to compliance issues, EH&S is responsible for assessing, designing, and implementing programs that ensure the safety of the college community. EH&S provides guidance, training and support to all divisions on an as needed basis while striving to increase the regulatory awareness of all who live and work on campus. * EH&S relocated this academic year from McGinnies Hall to the Administrative Office Complex.



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

Mission Statement

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

Annual Report

Environmental Health and Safety consists of three full time employees, one part time employee, and two student assistants. Environmental Health and Safety assesses and provides guidance, resources and training to the college community to ensure workplace safety, fire safety, emergency planning, sustainability and environmental compliance and stewardship. The EH&S department strives to pro-actively educate the campus community in regards to fire safety, sustainable practices, code compliance, waste recognition, waste minimization, waste disposal and various other issues associated with the environment within the university and college community.

Environmental Health and Safety's responsibilities include ensuring that all federal, state and local regulations with regards to EPA, DEC, DOL and OSHA are being met, and thus request and provide internal inspections, emergency response training, employee training and preparation of the campus for external environmentally-related government inspections.

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

- Assess, design and implement all environmental, workplace, and fire safety training for the college community. Oversee campus regulatory compliance. Issue/review permits as required
- Conduct fire, AED and workplace safety building inspections per requirements. Provide campus community with CPR/AED training
- Provide guidance and oversight in the proper management and disposal of industrial, hazardous, universal, electronic, biological and radiological wastes generated on campus
- Lead campus community in emergency planning and response training exercises. Arrange emergency planning training
- Develop a pro-active working relationship with all departments as it relates to new construction and regulatory compliance. Develop training programs for community members
- Foster support and ensure compliance as it relates to working with outside contractors on the SUNY Fredonia campus
- Maintain a campus-wide Safety Data Sheet file (SDS Online) for every hazardous material used or stored on campus. Identify waste streams and assure proper disposal methods
- Provide university-wide environmental related answers to questions posed by all members of the university and surrounding community
- Foster a team approach to working with the varying University departments to ensure chemical security and assist in the management of chemical emergency response
- Provide ergonomic workplace assessments and recommendations as requested
- Provide guidance and direction as requested in relation to NYS Fire Code
- Monitor and coordinate pesticide application certifications
- Provide leadership to the Sustainability Committee
- Calculate occupancy and square footage to meet occupancy needs in areas of public assembly on campus



Significant Accomplishments

- Continued to educate and utilize the NY-ALERT mass notification system on campus. Currently, approximately **2,800** campus community members have signed up for SUNY Fredonia NY-Alert. Monthly internal tests are conducted for the system in addition to “all-campus’ tests of the NY-Alert system conducted biannually
- There were 78 SUNY Fredonia campus members trained on CPR/AED for this 2013 fiscal reporting year. The number reflected the fact that our program changed from SUNY Lifesaver to utilizing The American Heart Association bringing the total on campus trained to **280** for Fiscal Year 2012-2013
- Utilized TouchNet as the registration method for our code enforcement in-service programs, and for signing up for CPR/AED training
- Provided Environmental Health and Safety departmental overviews to new employees on campus in an effort to better educate them on the services EH&S provides
- Continued to improve and increase academic compliance and stewardship within the university campus environment. This year building safety coordinators attended active shooter training. Over **30** members from the campus community were involved
- Over **80** RA’s and RD’s were trained on fire safety during the Fall 2013 semester
- Provided leadership and training resulting in the National Incident Management System (NIMS) compliant table top exercise for members of the Emergency Planning and Response team. Hosted NIMS training (ICS100/700) for secretarial staff, and additional courses required for Public Relations staff as well
- Hosted a local Safety Professional Consortium focusing on OSHA’s Hazcom 2012 on December 18th with **24** Environmental Health and Safety professionals from the local community attending
- Continued to promote the Building Safety Coordinator Program by actively recruiting participants. Conducted training sessions for new Building Safety Coordinators. As of June 2013, there were **71** Building Safety Coordinators. Additional recruiting will continue to occur throughout the semester
- Conducted periodic Campus Safety Committee meetings. The team functioned smoothly to address concerns brought to the group’s attention
- Utilizing ANGEL, implemented online Hazard Communication/Right-To-Know training for all campus employees. Our success rate was approximately 100% among faculty and staff
- Developed an emergency planning training matrix which outlines all required and best practice training across campus for each calendar year. Programs are expanded as required
- Continue to promote transportation awareness by advocating bus systems

Statistical Data

* indicates training not conducted annually

Training Program	Number of Employees Trained	Number of Employees Trained	Number of Employees Trained
Fiscal Year	2011	2012	2013
Aerial / Manlift Safety	*	*	*
Aerial Lift	20	38	*
Asbestos Awareness	*		
H1N1 Awareness		19	19
Avian Flu Awareness		19	19
Bloodborne Pathogen Training	120	118	147
Building Construction Renovation & Permit Training	8	*	*
Building Inspections	28	48	34
Chemical Safety Training – Chem. Hygiene Program	32	96	40
Chemical and Oil Spill Information	*	*	92
Compressed Air	34	7	27
Confined Space Safety	34	*	*
CPR/AEDSUNY Lifesaver/American Heart Assoc.	129	9 SUNY Lifesaver 64 AHA CPR/AED	78
EHS Awareness	*	28	28
Electrical Safety	73	2	31
Emergency Response	54	6	135
Ergonomics & Assessments	*	*	6
Evacuation Plan	145	244	260
Fall Protection	8	0	0
Fire Extinguisher Use	90	68	157
Fire Safety	323	417	260
Fredonia Fire Department	35	*	*
Fork Truck	20	30	*
Fume Hood Testing	*	*	57
Hazardous Waste Management		*	140
Hearing Conservation	38	*	*
Heat Stress/Heat Exhaustion Awareness	50	*	41
Hotwork Permits	32	12	22
ICS-200	*	*	*
Incident Command System (ICS-100/700)	*	45	*
ICS-701.a,- 702.a,-703.a,-704 Public Information Officers	*	2	*
Laboratory Safety & Security	32	*	92
Chart cont'd on next page			

<i>Continued...</i>	2011	2012	2013
Ladder Safety & Security	34	96	*
Lead Awareness		14	14
Lockout/Tagout	73	2	31
Lyme Disease Awareness	50	*	19
Machine Guarding	36	8	*
NYS Right-to-Know	199	703	*
Oil SPCC	37	9	92
Pandemic Flu Awareness	50	*	*
Pesticides	3	*	*
Power/ Hand Tool	62	8	*
Powdered Industrial Vehicle		*	*
Personal Protective Equipment	43	*	260
Rabies Awareness	50	*	19
Radiation Safety		*	*
Respiratory Training and Fit Testing	12	*	*
RCRA Online	20	6	92
Safe Lifting		105	92
Scaffolding Safety	34	9	*
Slips, Trips and Falls		*	*
Theatre Rigging Training		*	*
Trenching/Shoring		*	*
Universal Waste Management	85	96	92
West Nile Virus Awareness	50	*	19
Work Zone /Flagger		25	*

Fire Code Violations

INSPECTION YEAR	NUMBER OF VIOLATIONS
2013	208
2012	196
2011	253

Tent and Hotwork Permits

PERMITS	TOTALS
Hot Work Permits	22
Tent Permits	10

Chemical Waste Disposal

WASTE DISPOSAL	POUNDS
Asbestos Waste	9 pickups
Hazardous Waste	155 gallons of oil & paint, 6400 pounds of other hazardous materials
Medical Waste	233.6 pounds
PCB Waste	20,180 kilograms
Universal Waste / Batteries / light bulbs	.4325 tons / 126 bulbs

Shared Services

- SCUBA Code in-service program. Two programs are hosted annually – one at SUNY Fredonia and one in Albany
- Currently working on updating the Emergency Procedure Booklet for the campus. This booklet will include updates such as information for tornado warnings and the procedure for an active shooter situation. Chautauqua Institute and Jamestown Community College's emergency planning was assisted by EH&S
- BOWMAC software program was reviewed by both Jamestown and Chautauqua Institute
- Facilities Services Training/Refrigeration software
- HazWopper Training in partnership with Genesee is being planned for April 2014

Assessment Update

Assessment Statement

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

Assessment Activities

- Work continues to further establish and develop a database to track all EH&S activity. The goal of a tracking system for EH&S is currently not a priority due to the prioritization of additional mandated requirements
- NY-ALERT sign-up is offered to all students upon signing into ANGEL. Faculty and staff are encouraged to sign up through notifications made by presentations, trainings, emails and exercises hosted on campus
- Reviewed dynamics of the Sustainability Committee, offering suggestions that integrate the climate action plan into the committee structure; ultimately the subcommittees will use the climate action plan to aid in setting up their 2013 goals and metrics. The sustainability committee will be working toward increasing campus community education efforts and encouraging positive behavior change

- Continued to assess the CPR/AED program using surveys to continually enhance and improve the CPR/AED training program. The American Heart Association is the agency which SUNY Fredonia will continue to use to train the campus, and the community
- Provided in-person education of the function of EH&S to both new employees and graduate assistants. We have introduced mandated training via the campus' online program FREDtraining
- Assessed campus-wide regulatory compliance and safety training, and updated workplace compliance training as required. Training included, but was not limited to, Emergency Response, Hazard Communication/Right-To-Know, Fire Safety, electrical, PPE, hearing conservation, aerial lift training, RPP, fire evacuation, and fire extinguisher hands-on training. There are a variety of training classes conducted throughout the university setting
- Conduct monthly and semi-annual tests of the mass notification system (NY-ALERT) on campus
- The required progress report was submitted to the ACUPCC on time which included target dates for carbon neutrality as well as an outline of significant accomplishments from the last several years
- A small-scale composting bin was purchased and food waste from the FSA commissary is being composted for use around the campus grounds
- The feasibility of a ZipCar program on campus was investigated and the campus is currently pursuing ZipCar; also investigated a carpooling program for implementation later in the 2013 year
- Certification for 2013 of 1,100 fire extinguishers; removal of 400 extinguishers for testing, maintenance, and logging in 60 new locations with bar codes
- AED's replaced 61 child size pads, logging in new dates and serial numbers; added 6 new locations in Maytum Hall and the baseball fields
- NY State Fire Inspection - most of the focus was on dorms (tapestry's, candles, and multi-plugs) with follow ups on corrections
- We filed 10 tent permits and posted locations with fire extinguisher and exit signs
- Performed occupancy per square footage of 45 areas of public assembly around campus

Assessment Goals

- Continue to increase NY-Alert participation by conducting various announcements through Public Relations, meeting notifications, distribution lists, flyers, webpage and student email
- Increase participation in the CPR/AED program by enhancing training opportunities, presentations, website information, newspaper, and email to community members
- Continue to conduct emergency planning and response training exercises and promote emergency planning training on campus and to the community
- Enhance contractor training, and include SUNY Fredonia safety protocol requirements language to be placed within all building renovation contracts. Currently we have new requirements for asbestos under the new HMMP (Hazardous Materials Management Plan)
- Provide additional training for building safety coordinators on campus

- Coordinate and implement both classroom and hands-on fire training for FSA employees
- Develop means to quantitatively measure progress of campus initiatives
- Maintain compliance with the American College and University Presidents' Climate Commitment (ACUPCC) by completing a progress report
- Explore solar, composting, and water reclamation options for the campus
- Implement carpooling and ZipCar programs
- Investigate funding opportunities for a solar feasibility study

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

Facilities Planning

FACILITIES PLANNING

Introduction

The Office of Facilities Planning is a single department responsible for the identification and administration of capital construction and residential rehabilitation projects on campus. Coordination and support is provided to all departments on campus, while frequent interaction with the SUNY Construction Fund, Dormitory Authority, Office of Capital Facilities, NYS Department of State Division of Code Enforcement and administration, Office of State Comptroller, outside consultants, and contractors remains a fundamental aspect of the successful completion of these major renovations. This office is also responsible for overseeing the campus Five-Year Capital Plan and works closely with the Vice President for Finance and Administration and the President in developing capital facilities priorities. The upcoming fiscal year will see more involvement in campus construction in the areas of minor and major rehabilitation and in-house construction, as well as many design starts.



Seated from left to right: Lori Johnson, Shannon Moore and Gretchen Fronczak; Standing from left to right: Markus Kessler and Paul Agle

Mission Statement

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

Annual Report

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

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

This department aggressively pursues the college mission of providing a “challenging, safe, and supportive educational environment” through its commitment to meet high standards and provide superior quality facilities.

Facilities Planning is comprised of one full-time Director who maintains overall responsibility and direction for the department. This position is also designated as the campus Code Compliance Manager responsible for building code compliance, issuance of building permits, and all code review issues. A full-time Assistant Director oversees solicitation and administration of construction/consultant contract services for both Facilities Planning and Facilities Services Departments. In addition, this position addresses project funding issues, and identifies and implements administrative procedures and operations. A full-time Capital Project Assistant provides administration support of construction/consultant contracts and project site support. A full-time Capital Project Manager provides technical knowledge during all phases of a project. Both the Director and Capital Project Manager follow designated projects from the initial to end stages and provides all monitoring, management, and coordination required between these stages. A full time Secretary, with the assistance of one .5 Student Assistants, provides the necessary administrative support required of the department and all associated activities.

Significant Accomplishments

The 2012-2013 Annual Report for the Facilities Planning Department highlights many accomplishments including:

- Progression of the administration of 73 consultant and construction contracts for both Facilities Planning and Facilities Services totaling \$10.9M. 14 contracting activities (out of a total of 73) were processed in direct support of Facilities Services operations
- Completed and occupied several major projects. These are highlighted in the following sections of this report and totaled \$26,250,000
- Design and construction continue on major new projects. These are highlighted in the following sections of this report and total \$138,900,000

1. Academic/Administration/Infrastructure Projects

- Studies and Reports:
 - Spine Bridge Structural Conditions Assessment Report
- Planning:
 - SUCF Five Year Capital Plan
 - Houghton Hall Rehab: Design consultant selected
- There were 3 projects in design or bid ready for a total of \$42,000,000
- There were 1 projects in construction for a total of \$60,000,000
- There were 7 projects completed for a total of \$25,000,000

Capital Projects in Design or Bid Ready	Capital Projects in Construction	Capital Projects Completed
Rockefeller Arts Center Addition – Bid Ready	Science Center Building	Field House Bleacher Replacement
Upgrade Elevators Various Buildings – Bid Ready		Maytum Hall Interior Rehab
AHU & Controls Upgrade – Bid Ready		LoGrasso Hall Exterior Rehab
		Electrical Distribution Upgrade
		Dods Hall Fitness Center
		Upgrade Domestic Water System Ph II
		Maytum Hall Window Replacement

Academic Major Commissions

- **Science Center Building**



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



The facility will operate year-round, to serve not only the academic calendar, but also a diverse group of programs, including Biology Summer Research Fellowship programs, business and technology conferences, and local community programs.

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

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

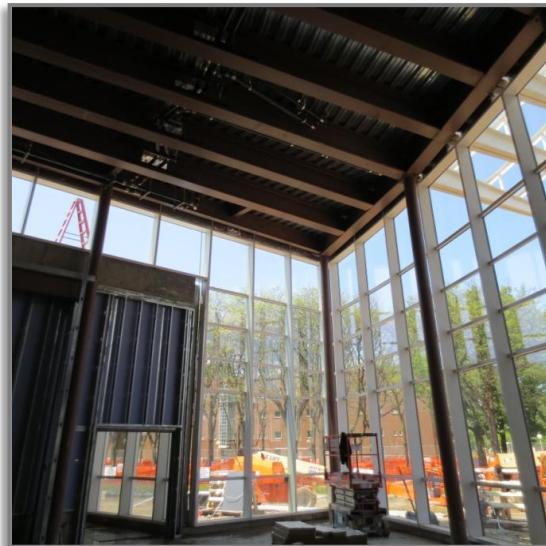
The three story structure is organized as a double loaded corridor with teaching labs and shared research labs on the northern side, and a combination of individual research labs and offices on the southern side. Offices are distributed evenly throughout the main structure. Their periodical alternations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



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

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

The project Architects are Mitchell Giurgola Architects, LLP of New York, New York. LeChase Construction Services, LLP of Rochester New York is providing construction management services. The Pike Company of Rochester, New York is the General Contractor. The project budget is \$60,000,000. Construction began in early July 2011 and is scheduled to be completed in mid-February 2014.



- **Dods Hall Fitness Center**



Constructed in 1962, Dods Hall is part of an athletic complex which supports competitive intercollegiate and recreational intramural athletic programs. Special features of the complex include a gymnasium, dance studio, ice rink, basketball/track arena, and a natatorium. The existing fitness center in Dods Hall offers use of nautilus equipment, exercise machines and free weights to members of the campus community.

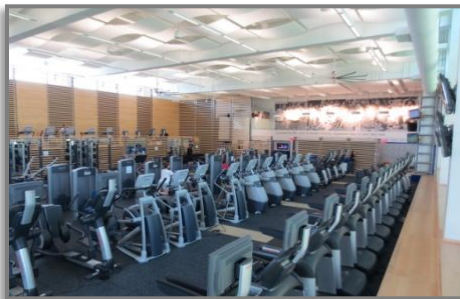
This project provided the campus with a new fitness center located within the Dods Hall old pool area. The new fitness center will be used by both the campus and local community. Critical maintenance issues were also addressed within the space, such as the removal of asbestos containing panels that covered the structural framing, window replacement, bleacher removal, finish upgrades, lighting and electrical upgrades. The design consisted of an exterior visual connection to the fitness center by removing the south façade and southwest corner masonry brick, and installing a new trans-parent curtain wall. The project also introduced a climbing wall located on the west wall, and a locker area located at the east end adjacent to the new entry and check-in counter. The space is finished with wood acoustical panels, a new rubber floor and a suspended fabric ceiling with four large ceiling fans to provide air circulation. Flat screen TV's are placed in various locations and a sound system provides background acoustics.

The fitness center consists of two levels which contain the following:

Lower Level: Cardiovascular, Selectorized / Circuit, Smith Machines, Free Weights, Climbing Wall and Stretching Area

Upper Level: Cardiovascular and Stretching

The project Architect was JCJ Architects of Hartford, Connecticut. The project budget was \$3,500,000. Resetarits Construction of Buffalo, New York is the General Contractor. Construction began in early April 2012 and was completed in early February 2013.



- **Rockefeller Arts Center Addition**



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

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

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



The following objectives, developed by SUNY Fredonia, shall include but not be limited to:

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



The project construction document phase was completed in January 2013; however the bid phase was placed on hold due to state funding issues pushing the project back one year. The State University Construction Fund is anticipating receiving bids mid December 2013 with a construction start date of May 2014.



The project is being designed by Deborah Berke & Partners Architects of New York, New York. Campus Construction Management Group of Amherst, New York is providing construction management services. The project budget is \$40,000,000. Completion of construction is scheduled for the summer of 2016.

2. Residence Life Projects

- Studies and Reports:
 - None
- Planning:
 - Residence Hall Capital Plan
- There are 2 projects in design for a total of \$6,650,000
- There is 2 project currently in construction for a total of \$30,250,000
- There were 2 projects completed for a total of \$1,250,000

Projects in Design or Bid Ready	Projects in Construction	Projects Completed
Disney Hall Lobby Upgrade	SUNY Fredonia Townhouse	Kirkland Complex Window Replacement Phase IV of IV
Andrews Complex Window Replacement Phase I - IV	Hemingway Hall Elevator Upgrade	Gregory Hall Stair Tower

Residence Life Major Commissions

- **SUNY Fredonia Townhouse**



SUNY Fredonia strives to provide a comprehensive residence life program as an integral part of the educational program and academic support services of the institution. There are 14 Residence Halls conveniently located for students to choose from. These halls consist of five single sex and nine coeducational buildings. Students also have a choice of corridor, suite, kitchen-suite, or independent living. The main benefit of living in a residence hall is convenience. Living right on campus, in the middle of everything, is the best and fastest way to become a part of SUNY Fredonia. Academic buildings and Reed Library are a short walk from anywhere on campus, as are nightly activities in the Williams Center. On select nights, you are right in the middle of Blue Devil Basketball, Hockey, and Rockefeller Art Center events. The Residence Life staff is dedicated to providing essential services for resident students and fostering an environment that promotes personal and community development.



Construction of the townhouse style residence halls are well underway and will provide housing for up to 200 residents. There are six resident buildings consisting of three apartment styles (single level, two level and three level apartments) with a front porch. Each apartment style independent living unit shall consist of a kitchen, living/dining area, four single bedrooms, two bathrooms and a laundry area. In addition each building is ADA accessible and also provides storage, CTV, data and communications.



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

The project is being designed by Chaintreuil Jensen Stark Architects of Rochester and Buffalo, New York with the assistance of DASNY. The project budget is \$30,000,000. Construction began April 2013 and is scheduled to be completed summer 2014.



3. Additional Significant Accomplishments

- For years, Facilities Planning has supported construction and design solicitations and contracting activities for campus-let projects. This exceptionally lengthy process is daunted by numerous laws and regulations governed by numerous state and federal agencies. Each year, this department experiences a larger workload than the year before. SUNY Fredonia has been recognized as carrying one of the largest workloads of campus-let projects among all 64 SUNY campuses. This number continues to increase; staffed with the knowledge and expertise to administer this program at the campus level, our campus receives additional funding to accommodate a greater construction and design work load – through both contract administration and project management. The current value of campus-let contracting functions over the past year is \$10.9 million. While an average contract can take six to ten weeks to process from solicitation through award, and an average change order can take four to six weeks to process, the current workload would indicate that Facilities Planning *initiates* approximately 1.4 new contracts and/or change orders per week, 52 weeks per year. Most contracts are rarely “average” and some may even take months to negotiate before final approval is obtained – needless to say there is a large number of contracts in varying stages of progression that are occurring at the same time. An additional consideration is that this function does not end there. Facilities Planning tracks contracts after award through completion. It is not uncommon for a design contract to extend over the course of several years.
- Facilities Planning continues working with SUCF and campus staff to complete and close out projects for the 2008-2013 capital plan. The current plan consisted of 45 projects with a total budget of \$69,285,000.
- Major Capital Plan design starts for 2012-2013 include the following projects:
 - Houghton Hall Rehab
 - Upgrade Elevators Various Buildings
- Facilities Planning continues working with DASNY and campus staff to identify and establish projects for residence capital plan. The current plan consists of 4 projects with a total budget of \$36,900,000.
- Major Residential design starts for 2012-2013 include the following projects:
 - Disney Hall Lobby Upgrade
 - Andrews Complex Window Replacement Project
- Various design/construction activities were progressed and/or completed during the past fiscal year. Close coordination was maintained with the Construction Fund and DASNY, as well as the campus to ensure regulatory requirements were met and that all construction activities have been designed to meet the needs of the campus constituents. Projects progressed and/or completed include:
 - Upgrade Domestic Water System Ph II – Construction completed in August 2012
 - Electrical Distribution Upgrade - Construction completed in August 2012

 - Williams Center Interior Rehab – Construction completed in September 2012
 - Maytum Hall Window Replacement – Construction completed in September 2012
 - Maytum Hall Interior Rehab – Construction completed in December 2012
 - Dods Hall Fitness Center – Construction completed in February 2013

- LoGrasso Hall Exterior Rehab – Construction completed in April 2013
 - Fieldhouse Bleacher Replacement – Construction completed in August 2013
 - Gregory Hall Stair Tower– Construction completion in August 2013
 - Kirkland Complex Window Replacement Ph IV – Construction completed in August 2013
 - Science Center - Construction on going
 - Townhouse Residence Hall – Construction on going
 - RAC Addition and Rehab – Bid Ready (SUCF anticipates receiving bids in December 2013)
 - Design starts include Andrews Complex Window Replacement and Disney Hall Lobby upgrade
- During the 2012-2013 Fiscal Year, 73 construction and consultant contracts and formal change orders were in varying stages of solicitation/contract award by Facilities Planning. The volume of contracts during this fiscal year decreased by a total of 52 from the previous fiscal year; the total dollar value of contracting activities during the 2012-2013 fiscal year totaled \$10.9 million. Of this total, \$1 million represents 14 contracting activities (out of a total of 73) that were processed in direct support of Facilities Services operations. Following state regulations, fully administered contracts consist of all stages of advertising, bidding/solicitation, bid reviews, and contract administration for approval on campus. The Office of the State Comptroller and Attorney General approval is no longer needed on construction and design contract; however they are subject to their review and approval at any time. These projects consist of those that are funded through DIFR funds, Minor Rehab and Repair, Capital funding, and in-house sources. Refer to 2012-2013 Campus-Let Design and Construction Projects Report and chart page entitled Campus-Let Construction and Design Contracting Activities.
 - Facilities Planning continues to track the progress of projects administered by the Dormitory Authority. All projects previously identified for closure with unexpended funds identified for the return to campus have been completed. Facilities Planning also continues the closeout process with the Construction Fund with all closeouts current as of this fiscal year end.
 - Facilities Planning along with Facilities Services, Finance and Administration and the Construction Fund are in the process of completing the 2008-2013 Campus Capital Plan and establishing the new 2013-2018 Campus Capital Plan. The 2013-2018 plan is the fourth consecutive multi-year plan which has allowed the University to identify and propose programs to address the ongoing critical maintenance priorities of the campus. The objective of the capital plan is to protect, preserve, modify and maintain the campus' environment, facilities and supporting infrastructure. In addition the plan identifies several Special Project Initiatives such as Houghton Hall Rehab, Program Study for Renovations of Jewett Hall for Academics in lieu of New Academic Building, and the Welcome Center Project. This new plan has identified approximately \$112.7 million of critical maintenance projects and adaptation projects, and \$34 million in special initiative projects.
 - Among the 64 campuses, SUNY Fredonia's Facilities Planning Department continues to administer one of the most active campus let project programs.

- Facilities Planning continues to refine its requirements for building permits, tent structure permits, certificate of compliance and inspections during construction. During this fiscal year Facilities Planning issued 16 building permits, and 8 tent permits.

Statistical Data

A Summary of Current Capital Construction Projects is included which provides a breakdown of projects by Academic/Administrative Buildings, Residential Rehabilitation, and Other Site/Infrastructure. An accompanying chart illustrating the percentage of each category to the overall capital construction cost is included as well. Also provided is statistical data of contracting activities during this past fiscal year (2012-2013), Campus-Let Design and Construction Projects Report, and related charts illustrating unit support and volume/value increases for campus-administered contracting activities.

Assessment Update

Assessment Statement

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

Assessment Activities

Facilities Planning completed or began the following activities per its goals of the 2011-2012 Annual Report and Assessment Update:

- Completed design and construction of the Fieldhouse Bleacher Replacement Project
- Completed construction of the Dods Hall Fitness Center
- Completed construction of the Williams Center Rehab Project
- Completed construction of the Water Distribution System Phase II
- Completed construction of the LoGrosso Hall Exterior Rehab Project
- Completed construction of the Upgrade of Underground Electrical Distribution System and Electrical Substation Project
- Completed construction of the Maytum Hall Interior Rehab Project
- Completed construction of the Maytum Hall Window Replacement Project
- Completed design and construction of the Rehab of Gregory Hall Stair Tower
- Completed design and construction of the Kirkland Complex Window Replacement Phase IV Project
- Completed design of the RAC Addition and Rehab Project
- Completed design of the AHU and Controls Project
- Completed design of the Elevator Upgrades Various Buildings Project
- Completed the second development phase of SUNY Fredonia's 2013-2018 Capital Plan
- Began construction of the SUNY Fredonia Townhouse Project

Assessment Goals

- Work with all entities involved in the implementation of projects identified in the next Five-Year Capital Plan
- Continue to progress ongoing projects and identify and address those not already identified. Ensure close coordination with those affected by the planning and construction, and maintain close working relationships with the Construction Fund and Dormitory Authority in the implementation of campus construction. Continue to provide coordination among all relevant parties and monitor construction for compliance with contract and regulatory requirements. Projects already identified for advancement include:
 - Complete design and begin construction of the Disney Hall Lobby Upgrade Project
 - Complete design and begin construction of the Andrews Window Replacement Project Phase I
 - Complete design of the President's House A/C Project
 - Complete construction of the Hemingway Hall Elevator Upgrade Project
 - Complete construction of the SUNY Fredonia Townhouse Project
 - Complete construction of the Science Center Building
 - Begin design of the Houghton Hall Rehab Project
 - Begin construction of the RAC Addition Project
 - Begin construction of the AHU and Upgrade Controls Project
 - Begin construction of Elevator Upgrades Various Buildings Project
 - Complete and attain final approval of the 2013-2018 Capital Plan
- Continue to provide support to newly identified priorities in an effort to obtain funding toward the continuous advancement of campus facilities and grounds. Continue working towards establishing the next Five Year Capital Plan as well as establishing projects per the Campus Master Plan
- Continue working with the Office of the State Comptroller, State University Construction Fund and DASNY to identify expectations and clarify standard measures for processing the procurement of consultant and construction contracts

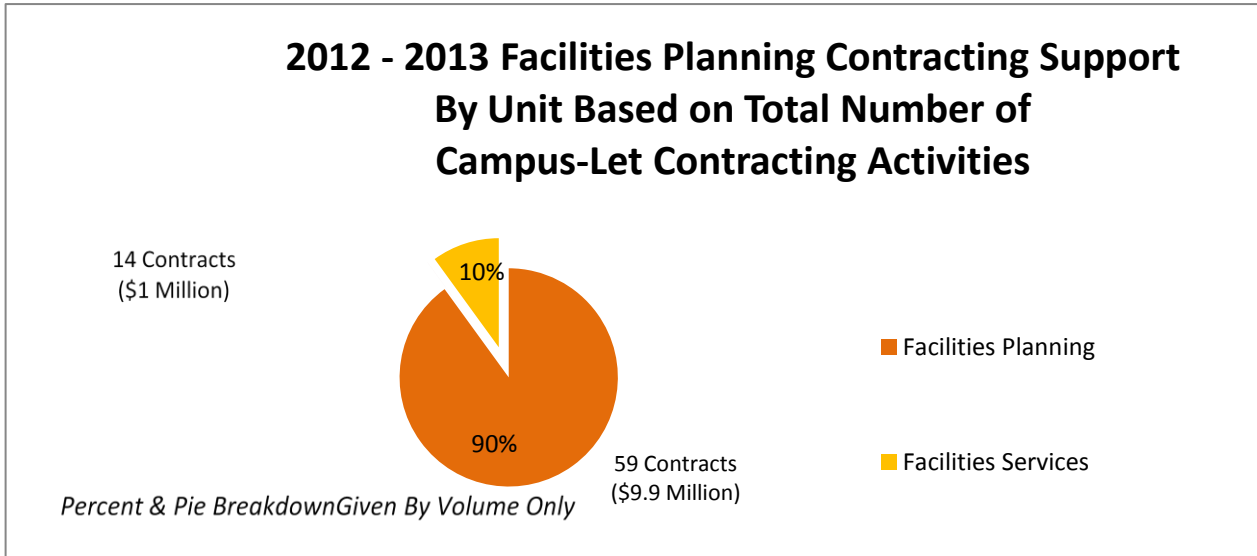
SUNY FREDONIA

Summary of Facilities Planning Capital Projects 2012-2013

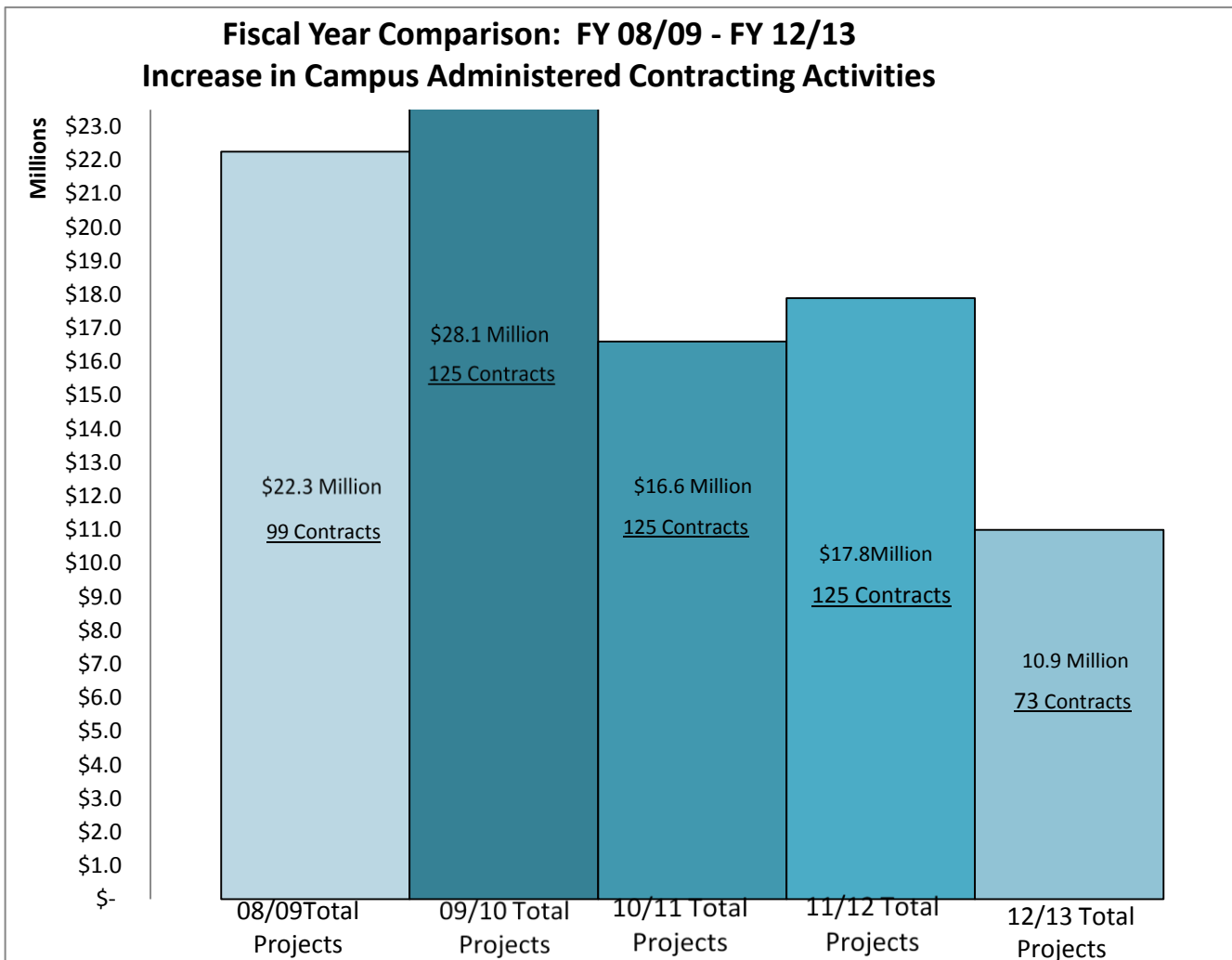
Project Description	Estimated Cost	Project Status	Contractor
I. Academic/Administrative Buildings			
Science Technology Center	\$60,000,000	Construction	The Pike Company Deborah Berke & Partners Manning Squire Henning Co., Inc.
Rockeller Arts Center Addition (SUCF anticipates bids in Dec. 2013)	\$36,000,000	Bid Ready	
Williams Center Rehabilitation	\$13,000,000	Punch List	Picone Construction Resetarits Construction BRD Construction BRD Construction Resetarits Construction
Field House Bleacher Replacement	\$2,300,000	Construction	
Dods Hall Fitness Center	4,000,000	Completed	
Maytum Hall Interior Rehab	5,400,000	Completed	
Maytum Hall Window Replacement	1,300,000	Completed	
LoGrasso Hall Exterior Rehabilitation	3,500,000	Completed	
Subtotal - Academic/Administrative Buildings	\$125,500,000		
II. Residence Hall			
Townhouse Residence Hall	30,000,000	Construction	Burgio & Campofelice TGR Construction
Kirkland Complex Window Replacement	6,000,000	Completed	
Gregory Hall Stair Tower Replacement	350,000	Completed	Allgaier Construction Spicer Group Flynn Battaglia Architects Flynn Battaglia Architects
Hemingway Hall Elevator Upgrade	250,000	Construction	
Andrews Complex Window Replacement (Ph. 1 Igoe Hall)	6,100,000	Design	
Disney Hall Lobby Upgrad	550,000	Design	
Subtotal - Residence Halls	\$43,250,000		
III. Other Site/Infrastructure			
Rehab/Upgrade Elevators (SUCF anticipates bids in Nov. 2013)	3,000,000	Rebid	TBD O'Connell Electric Co.
Electrical Distribution Upgrade	5,000,000	Completed	
Replace AHU's & Controls Phase I	3,000,000	Design	Wendel Companies New Frontier Excavating & Paving
Domestic Water System Replacement, Phase II	3,500,000	Complete	
Subtotal - Other Site/Infrastructure	\$14,500,000		
Total Construction Cost	<u>\$183,250,000</u>		

CAMPUS-LET CONSTRUCTION AND DESIGN CONTRACTING ACTIVITIES

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



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

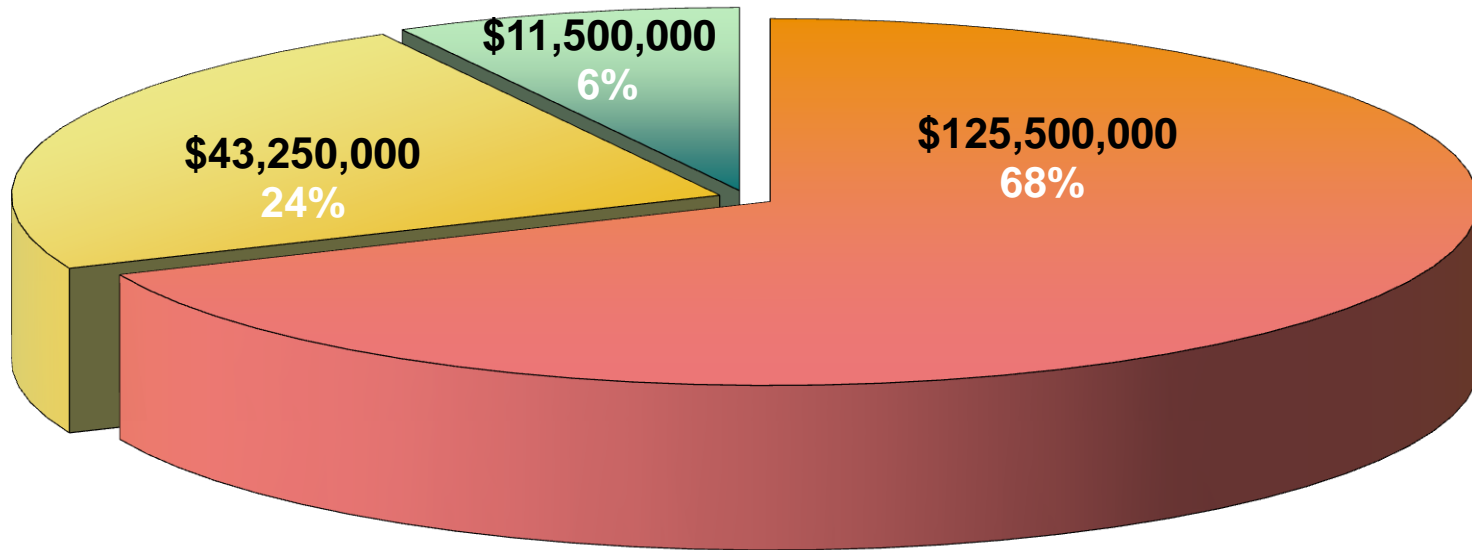


**State University of New York at Fredonia
Facilities Planning Office
SUMMARY OF CAPITAL CONSTRUCTION PROJECTS**

	PROGRAM BUDGET	PROJECT STATUS
I. ACADEMIC / ADMINISTRATIVE BUILDINGS		
Science Tech Building	\$ 60,000,000.00	Construction Underway
Rockefeller Arts Center Addition	\$ 36,000,000.00	Design Underway
Williams Center Rehab	\$ 13,000,000.00	Construction Complete
Field House Belacher Replacement	\$ 2,300,000.00	Construction Complete
Dods Hall Fitness Center	\$ 4,000,000.00	Construction Complete
Maytum Hall Interior Rehab	\$ 5,400,000.00	Construction Complete
Maytum Hall Window Replacement	\$ 1,300,000.00	Construction Complete
LoGrasso Hall Exterior Rehabilitation	\$ 3,500,000.00	Construction Complete
	\$ 125,500,000.00	
II. RESIDENTIAL REHABILITATION		
Townhouse Residence Hall	\$ 30,000,000.00	Construction Underway
Kirkland Complex Window Replacement	\$ 6,000,000.00	Construction Complete
Gregory Hall Stair Tower Replacement	\$ 350,000.00	Construction Complete
Hemingway Hall Elevator Upgrade	\$ 250,000.00	Construction Underway
Andrews Complex Window Replacement (Ph. 1 Igoe Hall)	\$ 6,100,000.00	Design Underway
Disney Hall Lobby Upgrade	\$ 550,000.00	Design Underway
	\$ 43,250,000.00	
III. OTHER SITE/INFRASTRUCTURE		
Rehab/Upgrade Elevators	\$ 3,000,000.00	Design Complete
Electrical Distribution Upgrade	\$ 5,000,000.00	Construction Complete
Replace AHU's & Controls Phase I	\$ 3,000,000.00	Design Complete
Domestic Water System Replacement, Phase II	\$ 3,500,000.00	Construction Complete
	\$ 14,500,000.00	
PROJECTS -- TOTAL	\$ 183,250,000.00	

CAPITAL CONSTRUCTION PROJECTS

Total Program Budget: \$183,250,000.00



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

Construction and Design Projects

Facilities Planning Construction Projects (July 2012 – June 2013)		
Project #	Project Title	Cost
05321	Rockefeller Arts Center Exterior Rehab	\$614,000.00
05321	CHANGE ORDER #1	-\$815.00
05321	CHANGE ORDER #2	\$10,092.50
05324	Bleacher Replacement - Steel Hall	\$876,830.00
05324	CHANGE ORDER #1	TBD
05331	Rehab Dods Hall: Fitness Center	\$2,137,000.00
05331	CHANGE ORDER #1	\$6,617.47
05331	CHANGE ORDER #2	\$25,948.60
05331	CHANGE ORDER #3	\$14,502.84
05331	CHANGE ORDER #4	\$45,281.12
05331	CHANGE ORDER #5	\$123,882.78
05331	CHANGE ORDER #6	TBD
05347	Maytum Hall Int. Rehab Asbestos Abatement - CO#3	-\$20,105.00
05347	Maytum Hall Interior Rehab - CO #3	\$36,102.94
05347	CHANGE ORDER #4	\$46,221.00
05347	CHANGE ORDER #5	\$23,588.00
05347	CHANGE ORDER #6	\$4,560.00
05347	Maytum Hall Window Replacement RE-BID	\$1,066,400.00
05347	CHANGE ORDER #1	\$0.00
05347	CHANGE ORDER #2	-\$525.00
D059EK	Kirkland Comp. Window Replacement, Ph IV - Disney	\$961,000.00
D059FS	I00325 - Eisenhower Lobby Renovations (GC)	\$199,900.00
D059FS	CHANGE ORDER #1	\$4,637.40
D059FS	I00425 - Eisenhower Lobby Renovations (Mech.)	\$109,700.00
D059FS	CHANGE ORDER #1	\$6,285.00
D059FS	I00525 - Eisenhower Lobby Renovations (Elect.)	\$78,250.00
D059FS	I00625 - Eisenhower Lobby Renovations (Plumb)	\$7,661.00
D059FT	I05006 - Gregory Hall Rehab Bathrooms (GC)	\$247,000.00
D059FT	CHANGE ORDER #1	\$50,456.00
D059FT	I05106 - Gregory Hall Rehab Bathrooms (Elect)	\$33,250.00
D059FT	I05206 - Gregory Hall Rehab Bathrooms (Plumb)	\$81,470.00
D059FT	CHANGE ORDER #1	-\$12,337.23
D059FT	I05306 - Gregory Hall Rehab Bathrooms (Mech)	\$24,945.00
D059FT	CHANGE ORDER #1	\$572.03
D059GB	Gregory Hall Stair Replacement	\$234,420.00
	TOTAL:	\$7,036,791.45
Facilities Planning Design Projects		
Project #	Project Title	Cost
05321	Rockefeller Arts Center	\$112,103.05
05321	AMENDMENT #1	\$0.00
05324	Field House Bleacher Replacement	\$88,534.93
05324	AMENDMENT #1	\$4,601.00

Facilities Planning Design Projects Continued		
05324	AMENDMENT #2	\$0.00
05331	Rehab Dods Hall: Fitness Center	\$479,175.00
05331	AMENDMENT #1	\$0.00
05331	AMENDMENT #2	\$0.00
05337	Replace AHUs and Controls	\$279,706.05
05337	AMENDMENT #1	\$0.00
05337	(CONTRACT CANCELATION)	-\$70,902.28
05347	Maytum Hall Window Replacement - Amendment #1	\$0.00
05347	Maytum Hall Interior Rehab	\$420,246.00
05347	AMENDMENT #1	\$0.00
05350	President's House Air Conditioning	\$38,197.50
D059EK	Kirkland Complex Window Replacement	\$622,810.00
D059EK	AMENDMENT #1	\$0.00
D059FS	Eisenhower Hall Lobby Upgrades	\$68,651.33
D059FS	AMENDMENT #1	\$943.52
D059FT	Gregory Hall Rehab Bathrooms	\$87,224.02
D059FY	Hemingway Hall Elevator Upgrade	\$24,090.99
D059FZ	Disney Hall Lobby Upgrade	\$81,412.52
D059GA	Andrews Complex Window Replacement	\$596,716.08
D059GB	Gregory Hall Stair Tower	\$51,130.02
TOTAL:		\$2,884,639.73

Facilities Services Construction Projects (July 2012 –June 2013)		
Project #	Project Title	Cost
05313	I02502 - Mason Hall Basement Asbestos Abatement	\$184,600.00
D059FV	Andrews Complex Lighting Rehab - Phase I	\$79,625.00
D059FV	Andrews Complex Lighting Rehab - Phase 2	\$63,900.00
D059FW	Disney/Eisenhower Repair Mechanical Room Ceiling	\$203,400.00
D059FW	CHANGE ORDER #1	\$7,455.65
I284ST	Campus Parking Lot & Sidewalk Rehabilitation	\$133,900.00
I285ST	Kirkland Complex Pedestrian Circle Reconstruction	\$23,384.00
I286ST	Campus Roadway and Parking Lot Asphalt Installation	\$114,475.00
M05400	Carnahan Jackson Center - Rehab Chilled Water Piping	\$183,800.00
M05400	CHANGE ORDER #1	\$22,530.00
M05409	Maytum Hall Computer Center Replace A/C Phase III	\$39,500.00
M05409	CHANGE ORDER #1	\$2,455.00
M05409	CHANGE ORDER #2	\$7,540.00
TOTAL:		\$1,066,564.65

Facilities Services Design Projects		
Project #	Project Title	Cost
05317	Masonry Repairs - Various Buildings - AMENDMENT #2	\$2,585.00
TOTAL:		\$2,585.00
73 Projects Total		\$10,990,580.83

Facilities Services

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

FACILITIES SERVICES

Introduction

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



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

The department, under the direction of the Director of Facilities Services, includes 135 full-time permanent, part time and seasonal employees. Numerous students during the academic year and summer months provide additional resources to the department. The department maintains 2,090,580 gross square feet of buildings; 256 acres of land; 24 acres of parking lots with 3,117 parking spaces; 4.9 miles of roadways; over 7.5 miles of sidewalks, and cleans 1,855,278 net square feet of academic and residential building area. The department services and maintains over 10,000 energy management control points; 5,000 fire alarm devices; 4,300 doors; 2,500 clocks; 1,700 motors; 475 street lights; 74 boilers; 63 hot water heaters; 40 fire hydrants; 29 elevators; 21 emergency generators; 22 outdoor emergency phones, and over 20,000 light fixtures.

The department is comprised of five units all working toward the department mission:

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

- b. Purchasing and Requisitioning
 - c. Personnel Record Management
5. Technical Services
- a. Access Control / CCTV Network (Non Residential)
 - b. Work Order System and Physical Space Inventory Management
 - c. Webpage Development

Mission Statement

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

Annual Report

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

The Facilities Services Department utilizes an electronic work order system to manage over 9,000 work orders generated each year. The requests submitted each year to the department for work range from repairs to routine requests to hang pictures. The annual preventative maintenance work and work orders generated internally by the staff within the department are categorized by the types shown below. The category of the work order created defines the required response time for the staff within the department.

Category	Title	Description
01	Emergency Maintenance	Same day response required (graffiti, personal safety, security)
02	Trouble Calls	Requests from faculty, staff and students
03	Corrective Maintenance	Inspections; furniture repairs; sign installations; Work orders generated by the Facilities Services staff
04	Preventative Maintenance	Pre-planned work orders
05	Non-Maintenance	Event setups, moving, hanging pictures, issuing keys
06	Projects	In-house and capital projects

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

Category	Allotted Time
01	2 days
02	7 days
03	30 days
04	30 days
05	30 days
06	Varies

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

Capital Projects, Energy and HVAC

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

Controlling the campus' energy usage is the most significant operation of this group. Currently, there are over 10,000 control and monitoring points throughout the campus. The primary use of the BAS is to control and schedule mechanical equipment that is used to provide ventilation and regulate the temperature in campus buildings. In addition, the BAS is used to turn on most outdoor lighting.



Tim Bentham

Examples of the monitoring include:

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

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

- High water in electrical manholes
- Water alarms in the basements of Nixon, Houghton, Maytum, and Thompson Halls

- The Steele Hall Ice Rink operation
- The Natatorium pool operations
- Domestic hot water
- Various FSA freezers and coolers
- Air compressors

Significant Accomplishments

- Continued to expand the use of the BAS by installing more control and monitoring points. Most mechanical systems are controlled by the BAS
- Managed the BAS development for the Williams Center Rehab Project
- Revamped the controls for the first floor suite areas at Kasling and Grissom Halls
- Added the bathroom exhaust fans at Igoe, Hendrix and Alumni Halls to the system

The [Heating Services](#) group is staffed and operational 24/7 for most of the year. The staff is highly trained and responsible for the maintenance and operation of the campus heating systems. The staff performs preventative maintenance on all satellite boiler equipment, inspects all above-ground fuel oil storage tanks and maintains the campus emergency generators. They provide complete maintenance on the campus heating systems, their distribution system, and building components which include baseboard hot water heat.



From left to right: Herb Farmer, Gary Hardy and George Tucker

Significant Accomplishments

- Performed preventative maintenance on all of the heating boilers throughout the campus
- Modified the ductwork that serves the Thompson Hall FRED Express
- Provided after hour and weekend coverage to the campus
- Completed monthly testing of the emergency generators throughout the campus
- Responded to several work orders regarding heating and cooling issues

The [Refrigeration/Air Conditioning](#) group is responsible for maintaining refrigeration, air conditioning and exhaust systems throughout the campus. The staff maintains and repairs the exhaust fans, controllers, metal ductwork distribution systems, campus ice machines, walk in coolers and freezers and laboratory fume hoods. Chiller equipment and cooling tower water treatment is maintained by this group. In addition to performing many repairs throughout the campus, the staff uses their skill to perform many in-house projects each year.



From left to right: Tim Branden, Gary Hardy and Randy Grant

Significant Accomplishments

- Performed preventative maintenance on all refrigeration equipment on campus including, refrigeration equipment at all FSA locations, Biology department, water coolers throughout campus and air conditioning equipment across the campus
- Completed the annual maintenance and startup of the equipment at the Ice Rink at Steele Hall
- Provided temporary air conditioning for summer programs, Resident Director Apartments, and several offices on campus
- Completed system adjustments at LoGrasso Hall to provide better air flow and building temperature

Custodial Services

The [Custodial Services](#) unit consists of the Assistant Director, Head Janitor, four Supervising Janitors, 28 Janitors, 52 Cleaners, one SUNY Campus Worker and two seasonal cleaners. Custodial Services is responsible for the routine and construction cleaning of academic/administrative buildings and residence halls, which includes trash removal, collection of recycling, dusting, mopping, waxing, polishing terrazzo floors, vacuuming, shampooing of carpets, cleaning of public areas and restrooms, lamp replacement, window washing and much more.

The staff provides snow shoveling at building entrances and ensures the entrances are safe and well maintained. The department also performs minor routine maintenance and repair of items such as blinds and drapes. Most notable, the unit is responsible for commencement setup at Steele Hall each year. In addition, Custodial Services is responsible for opening and closing most buildings and provides moving services for the campus.



From left to right: Mark Delcamp and Sue Freitas



1st Shift Custodial – Supervisor, Art Franklin

From left to right, seated: Julie Echevarria, Linda Saletta, Kathy Stempkowski, Nancy Pawlak, Rosemary McCune, Ramona Padua, Julia Baughman, Aida Hernandez; 2nd row: Ron Ladolce, Hector Figueroa, Sue Michalak, Liz Kujawa, Cindy Weaver, Jim Foringer, Lee Szalkowski, Jorge Rosa, Melissa Buchanan, Terry Sysol; back row: Richard Logan, James Michaels, Gladys Lockett, Mary Leckliter, Leonard Coniglio



1st Shift Custodial – Supervisor, Tim Lillie

From left to right, seated: Joe Siragusa, Robert Miller, Nancy Castiglia, Sonia Kulian, Valerie Bertges, Cathy Walters, Linda Nixon, Randy Goodemote, Jose Rosario, Steven Peters; back row: Kevin McCarthy, Tim Lillie, George Wolfe, Natalio Matias, Wayne Seabildt, Tim Clarke, Dale Higgs, Sue Valentine, Robert Degolier



2nd Shift Custodial – Supervisor, Melanie Jacoby

From left to right, seated: Elizabeth Goblirsch, Kitty Pencek, Barb Barecca, Iris Rosa; 2nd row: David Tarnowski, Susan Smith, Vic Collura, Mary Ann Wykstra, Roxanne Logan, Melanie Jacoby; back row: Chuck Miller, Jeff Jakse, Joe Andrasik, Jack Anderson, Charlie Johnson, Mark Stewart



3rd Shift Custodial – Supervisor, Darlene Miller

From left to right, front row: Donna Poncharik, Darlene Miller, Phil Difrancisco, Bridget Hoisington, Jeff Deering; 2nd row: Sara Bixby, Matt Walters, Charles Gatto, Debra Kujawa; 3rd row: Lori Martin, Denilson Costa, Juliana Krauter, Ken Szymczak, Susan Lucas; back row: Brenda Lemanski, John Jakubowicz

Significant Accomplishments

- Continued to serve as a major contributor to the successful maintenance of SUNY Fredonia's facilities, including the pro-active repairs based on daily observations, biannual building inspections, and the Annual Residential Custodial Report (ARCR) conducted immediately after commencement
- Performed moving services for many departments including interoffice furniture moves for academic and residential areas, and larger furniture moves resulting from construction
- Provided services for the many specialized athletic and educational camps and programs residing on SUNY Fredonia's campus; the groups associated with these programs use academic, athletic and residential areas throughout the year
- Provided extensive cleaning to buildings that had major construction work occurring during the summer months
- Replaced window treatments in several areas of the campus
- Replaced carpet and vinyl floor tile in many offices, classrooms, hallways and student rooms including new carpeting at Hendrix Hall, Thompson Hall computer lab E287 and new stair treads in Kasling Hall
- Assisted with the coordination and the set up and tear down for many campus events, most notably commencement, scholars breakfast, and the all campus party

- Worked with Facilities Planning to schedule cleanup efforts for all capital projects such as the Disney Hall Window Project, Steele Hall Bleacher Replacement Project and LoGrasso Hall Windows and Exterior Renovation Project
- Evaluated and purchased many new environmentally friendly equipment items for use in the custodial department
- Continually evaluated and made the necessary staffing changes to positively support the day to day custodial operations
- Continued working with Residence Life to ensure their cleaning standards are being met daily
- In conjunction with the Office of Environmental Health and Safety, continued to provide annual Right to Know, Blood Borne Pathogens training, and the annual Custodial Safety training
- Worked with Residence Life, Savoy and Dan's Moving and Storage to remove old furniture and install new furniture at several Residence Halls, and to also relocate and repurpose furniture into other Residence Halls
- Collected and recycled approximately 300 used mattresses from the Residence Halls
- Coordinated and managed The Waste Wipeout Initiative during move-out at the Residence Halls in May; the totals for items collected included: 6,250 lbs. of assorted clothing, 125 lbs. of non-perishable food items and many misc. items such as (TV's, rugs and other small appliances and home furnishings) totaling 1,750 lbs. for a total combined weight of 8,125 lbs. which is an increase of 3,050 lbs. from the previous year. The items are collected for reuse by Chautauqua County Rural Ministries in Dunkirk
- Worked with Residence Life and University Services to coordinate the Attic and Seller Days event in the Steele Hall Ice Arena, where many older furniture items were repurposed on campus and/or sold to the community which significantly reduced the quantity of furniture placed in the landfill
- Worked closely with Property Control and University Services to provide many equipment transfers of various surplus items within the last year

Facilities Trades Services

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



From left to right: Jon Washburn, Rodney Hayes, Orion Purslow and Joe Fabritius

Significant Accomplishments

- Provided campus direction and support with the Electrical Upgrade Capital Construction Project, including many shut downs both scheduled and unscheduled, and several days of 24 hour attendance by staff
- Managed the annual testing of the campus fire alarm system
- Completed significant wiring upgrades at the President's House
- Completed numerous fire alarm upgrades throughout the campus
- Upgraded to LED lighting at several locations around campus
- Upgraded the Hemingway Hall and Schulz Hall hallway lighting to LED
- Installed fire alarm door holder magnets in various locations
- Installed several drinking fountains throughout campus
- Completed several smart classroom installations throughout campus
- Assisted many contractors with electrical needs on campus

The **Plumbing** group maintains the chemical treatment systems, swimming pool, plumbing fixtures, storm and sanitary drainage systems, supply fan units, water softeners, fire hydrants, backflow preventers, dishwashers and natural gas lines. In addition to performing many repairs throughout the campus, the staff uses their skill to perform many in-house projects each year.



From left to right: Jim O'Connor, Steve Peterson, Nelson White, John Baughman, Steve Siragusa

Significant Accomplishments

- Worked extensively with the Water Distribution Capital Construction Project including involvement with servicing every fixture within every building after new connections were made and chlorinated, then turned on for service

- Upgraded the drinking fountains at several areas; the new fountains are chilled and filtered, and provide water bottle filling stations
- Completed annual testing for the backflow preventers at many campus buildings
- Managed the annual fire hydrant testing across the campus
- Managed the annual testing for the fire sprinkler system in campus buildings, as well as several repairs and upgrades to the systems
- Managed the semi-annual flushing of sanitary sewer lines at the dining halls
- Addressed many work orders for plugged drains in the Residence Halls
- Completed annual preventative maintenance inspections and repairs to the plumbing fixtures in the Residence Halls

The [Grounds and Landscaping Services](#) group is responsible for maintaining 256 acres of land; 24 acres of parking lots with 3,148 parking spaces; 4.9 miles of roadways and over 7.5 miles of sidewalks. The group has one Supervisor and eight trades people, specializing in aspects of landscaping, forestry, and athletic field maintenance, as well as being CDL qualified highway and construction equipment operators. This group is responsible for the care and maintenance of every square inch of lawn on campus. They prune and maintain the trees and shrubbery, and design, plant, and maintain all of the numerous flower beds. The group is also responsible for around the clock emergency control of storm damage. During the winter months, the maintenance includes snow removal and ice control 24 hours a day. In addition, they maintain all traffic and regulatory signs along the campus roadways and parking lots. They perform special operations, such as excavation, hauling, and traffic control for in-house, electrical, plumbing and concrete work. They perform set up operations for events such as Alumni Weekend and FredFest, and continually look for ways to enhance the campus' appearance. The grounds crew also maintains several athletic fields, including the University Stadium soccer / lacrosse fields; one practice soccer field, baseball and softball fields, outdoor running track, and the cross-country running course. The maintenance includes layout, lining, irrigation and fertilization of the fields. The crew also cleans up debris and litter, and maintains the numerous waste and recycling stations, keeping the campus looking great.



From Left to right: Brent Kawski, Rich Newton, Willie Fuentes, John Cole, Steve Gromala, and Matt Thies

Significant Accomplishments

- Maintained existing planting areas, designed new planting areas and educated the campus community as to a sustainability system of beautification through native species gardens, “natural” form gardens, and wildlife desirable habitats

- Continued training and development of staff to provide the highest quality NCAA Division III outdoor athletic venues at our multi-use stadium, baseball and softball fields, track, volleyball courts, tennis and basketball courts, rugby field and the balance of acreage where campus groups, general students and community alike partake in activities
- Continued the use of environmentally favorable products such as winter ice melt, weed treatments and fertilizers
- Continued using a proactive approach to vehicle idle time to reduce emissions and fuel costs
- Educated and assisted with a campus/community tree planting project for Earth Day
- Continued the plan to phase out many annual flowers on campus and install perennial plantings to increase sustainability and reduce expenses
- Continued to maintain “No Mow” Zones to assist in reduction of emissions as well as fuel consumption
- Provided tools, and occasionally assisted or guided various campus groups that were performing service projects, whether an invasive weed pull on campus or assisting the elderly community residents with yard clean up
- Provided set up for a growing number of outdoor events, picnics, gardens and community use including FredFest, Alumni Weekend, Athletic Tournaments and the Senior Picnic

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



From left to right: James Kuras, Duane Blakely, Don Dillenburg, Brian Hobbs, Ray Bogue, Pete Cortes and Wayne Dorler

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

Expertise in the area of roofing enables the investigation and identification of roof leaks, with many repairs performed in-house. Support and supervision are provided on capital projects for

roof repairs, replacements and new installations. Semi-annual inspections are performed on all roofs throughout the campus. The existing conditions are reviewed, roof drain strainers are cleaned, and leaves and debris are removed from the rooftops. This proactive approach helps extend the life cycle of the roofs.

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

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

Significant Accomplishments

- Continued sustainability measures in projects including the reuse of materials and salvage of existing window, door and ceiling components to be used in future projects
- Continued painting of Academic buildings and Residence Hall student rooms, classrooms, corridors, doors and frames
- Replaced numerous broken windows, cracked doors and old hardware in the Residence Halls
- Installed “Smart” technology components in classrooms including new teaching stations, white boards and specific equipment requests based on academic disciplines
- Developed, maintained and prepared lock systems, keys and electronic security measures for numerous Faculty, Staff and Student requests; programed hundreds of users in the card access system
- Continued to address repairs identified under the Annual Residential Custodial Report (ARCR); this program focuses on maintaining the student living areas within the residence halls
- Continued to identify and install new room signage in many areas to enable guests, maintenance staff and emergency staff to better locate rooms
- Assisted with the Maytum Hall relocation from surge spaces back to Maytum Hall
- Assisted with the installation of new drinking fountains in Residence Halls
- Installed many window treatments in Residence Hall common rooms
- Completed interior renovations to former Maytum Hall surge spaces at Thompson Hall and Maytum Hall
- Power washed the limestone window sills at the exterior of Alumni Hall and McGinnies Hall

Office Operations

The **Office** is the customer service center for the Facilities Services Department. This unit is currently staffed with two Calculations Clerk 2 positions. In addition, student workers provide valuable assistance with the day-to-day tasks. The staff is responsible for maintaining the following information and services for the Facilities Services Department:

- Receiving and distributing trouble or emergency calls from campus constituents to applicable trades personnel
- Requisitioning for supplies and projects and monthly payment of all blanket purchase orders by procurement card
- Processing key requests for faculty, staff and students
- Maintaining records for:
 - Work Order System (PM's, building inspections and corrective maintenance)
 - Department budget
 - In-house and minor rehab/repair projects
 - Asbestos Abatement
- Maintaining the department's personnel records for:
 - Change of Status transactions (COS)
 - Training files
 - Performance Evaluations
 - CDL Compliance
 - Asbestos Handling License
 - Accident Reports
- Providing the following weekly and monthly reports:
 - Incubator Work Cost Report to Accounting
 - Incubator Completed Work Order Report
 - Building Access Work Status Reports
 - Janitor Report on Completed Work Orders
 - Residential Work Order Reports



From left to right: Amy Jackino and Shannon McKoon

Significant Accomplishments

- Processed purchases with the on-line Web Procurement System
- Increased the usage of the Citibank Visa Procurement Card
- Prepared the Facilities Services staff meeting minutes

- Processed COS forms for all Facilities Services transactions
- Prepared the overtime summary report on the web-based overtime database
- Monitored and issued probationary reports for both permanent and temporary employees
- Monitored and issued yearly evaluation reports for permanent employees
- Trained and supervised student assistants in office procedures
- Maintained the student key database
- Maintained the database and records for pest control needs
- Processed 9,713 work orders (3,357 residential, 6,330 non-residential, 26 unassigned)
- Processed 200 online requisitions and 68 paper requisitions
- Assigned, processed and tracked many projects including in-house; Minor Rehab and Repair; Capital Construction Projects; and Residence Hall (DIFR) projects
- Processed 33 department staff travel arrangements for meetings, trainings and certifications
- Processed 495 faculty, staff and student key requests
- Reconciled purchases on blanket purchases to local vendors on a monthly basis
- Processed 377 pest control problems
- Processed 1,136 transactions using the Citibank Visa procurement card for a total amount of \$751,600.60 which is an increase in the amount from previous years
- Managed the Marketplace uStore for 26 student key deposits and refunds

Technical Services

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



Mike Jackino

Significant Accomplishments

- Processed PSI update sheets sent to the State University Construction Fund (SUCF) System Administration using new web form
- Created the BCI and PSI information for various renovation projects
- Maintained the Facilities Service portable two-way radio inventory
- Completed several upgrades to the department computers as per campus requirements
- Collected the data for the 2013 Annual Residential Custodial Report (ARCR) for the Residence Halls, which included 1,984 scanned repair codes generating 26 work orders
- Maintained the software package for the work order system including installing software updates. Researched and started the system upgrade to web version 4.0
- Completed the Installation of security cameras at the President's Residence
- Completed the Thompson Hall project providing card access at Media Center W-203 and W-201
- Began process to upgrade card readers to iClass format at the Children's Center
- Managed the operation of CCTV cameras across the campus
- Processed requests for access cards granting building access to contractors and consultants
- Installed card access on door #1 at LoGrasso Hall
- Installed card access and video cameras at the Dods Hall Fitness Center

Statistical Data

During the past year, the department completed projects that involved all the units within the department. The Facilities Services Department embraces the practice of using environmentally sound building materials and techniques. Working closely with the staff within the Facilities Services Department, each unit provides valuable participation with each project. This team approach strengthens the commitment to ensure the health and safety of the campus community, and that the preservation of the facilities is a top priority. Projects are completed in academic, administrative and residence hall buildings across the campus. Additionally, many projects have been identified, scope of work created, and request for qualifications (RFQ) for consultant design services have been completed for many new projects.

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

Trade	No. Closed 2012-2013	No. Closed 2011-2012	No. Closed 2010-2011	No. Closed 2009-2010	No. Closed 2008-2009	No. Closed 2007-2008	No. Closed 2006-2007	No. Closed 2005-2006
Structural	2,074	2,035	2,337	2,648	2,539	2,774	2,653	2,567
Electrical	1,845	1,685	1,852	1,232	1,353	1,387	1,305	1,273
Heating Services	731	432	431	94	130	74	171	162
EMS	8	6	2	1	6	2	10	20
Lock Shop	1,595	1,385	1,430	1,355	1,414	1,379	1,321	1,301
Plumbing	1,606	1,445	1,615	1,529	1,817	1,743	1,801	1,797
Grounds and Landscaping	297	342	185	182	266	365	199	257
Asbestos	44	56	81	108	109	172	163	196
Refrigeration/Air Conditioning	579	387	392	438	327	410	413	385
Custodial	487	715	758	644	795	803	990	761
Total:	9,266	8,488	9,083	8,531	8,756	9,109	9,026	8,719

Assessment Update

Assessment Statement

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

Assessment Activities

- It is standard procedure to observe, review, inspect and monitor staff work while in progress, and when completed to insure the proper use of materials and equipment, workmanship, that regulations and codes are followed, schedules are met and that the work is performed according to plan
- Training, instruction and assistance is provided to ensure assignments are completed accurately and efficiently
- Completed work orders are reviewed monthly to ensure work is completed timely and that staff is working efficiently
- Monthly and yearly work order analysis measures the percent of work orders generated and completed per each category, the emphasis for meeting the operating needs, and thereby supporting the department mission
- Surveys were sent over a six year period to the originators of Category 2 work orders called Trouble Calls. Responses were isolated between academic and residential areas. The information gleaned from the results was reviewed and used to enhance the services provided by the department. The following information has been gleaned from the survey responses:
 - Response time to work request was acceptable
 - Service staff was introducing themselves
 - Service representatives were explaining process
 - The work was completed promptly once started
 - The work is being completed in a professional manner
- Overwhelmingly, comments from Faculty, Staff, Students and Visitors express great appreciation and support of the work performed on campus by the Department. The comments are often unsolicited. These comments are expressed at the All Campus Meeting and throughout the year by the campus.

Assessment Goals

- Continue Incentive Program Safety Awards for proper chemical labeling, correct bulb storage and no chocked doors
- Review appropriate procedures to perform all custodial operations in the most effective, efficient and economical manner

- Evaluate and modify standards for the quality and quantity of work produced where needed
- Evaluate cleaning methods and work performance standards to ensure a more effective and efficient cleaning program
- Evaluate new products and procedures for cleaning
- Evaluate work performance against the established cleaning procedures and periodically monitor operations of the staff
- Provide training, instruction and assistance to ensure assignments are completed accurately and efficiently
- Periodically inspect buildings and assigned areas for compliance with cleaning programs and standards
- Continue daily and biannual building inspections each semester
- Train staff in the proper and efficient operation of the equipment, methods and procedures of the department to ensure assignments are completed accurately and efficiently
- Continually observe, review, inspect and monitor staff work while in progress and when completed, to insure the proper use of materials and equipment, and workmanship. Ensure schedules are met and that the work is performed according to plan
- Review completed work orders monthly to ensure work is completed timely and staff is working efficiently
- Perform a comprehensive customer service satisfaction survey
- Review the results of the energy audit and implement new controls and procedures were practical to achieve additional reduction in the use of energy on campus

Faculty Student Association

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

FACULTY STUDENT ASSOCIATION

Introduction

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

An Auxiliary Services Corporation exists within most of the SUNY campuses. Each corporation individually holds a contract with their respective campus. The current 10-year agreement between the FSA and SUNY Fredonia was amended to include an extension for an additional period through June 30, 2018. The contract specifies individual campus activities and services of the corporation. This contract includes physical space and equipment documentation, as well as corporation indemnification of SUNY and the State of New York. In addition, budget requirements and matters of financial reporting are specified. The agreement guidelines include areas of organization, specifying Board composition and structure. Auxiliary services are listed in each agreement with the opportunity for additional services added through an agreement amendment process. Provisions for audit review, funded reserves, and corporate equity guidelines are also specified in the agreement. The 10-year agreement satisfies requirements for a contract between FSA and SUNY Fredonia that corresponds with the term of financing for FSA funded construction projects.

Mission Statement

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

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

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

Along with the mission statement, the Faculty Student Association strives to provide program funds to SUNY Fredonia. The program support has steadily increased over the past few years in an effort to recognize decreasing support for SUNY Fredonia from testate of New York. This has been primarily accomplished through a strong capitalization program resulting in new and/or renovated facilities offering contemporary and revitalized services. FSA strives to identify the needs of the entire campus community, while focusing on operating efficiency and appropriate staffing.

Executive Offices

Annual Report

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

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



Significant Accomplishments

From left to right, seated: Eric Johnson, Lucas Catalano, Courtney Remington, Judy Gizowski, Terri Helwig, Karen Barnett; back row: Katie Thies, Sarah Del Monte, Darin Schulz, Michelle Kowalski, Matt Snyder, and Bill Michalski

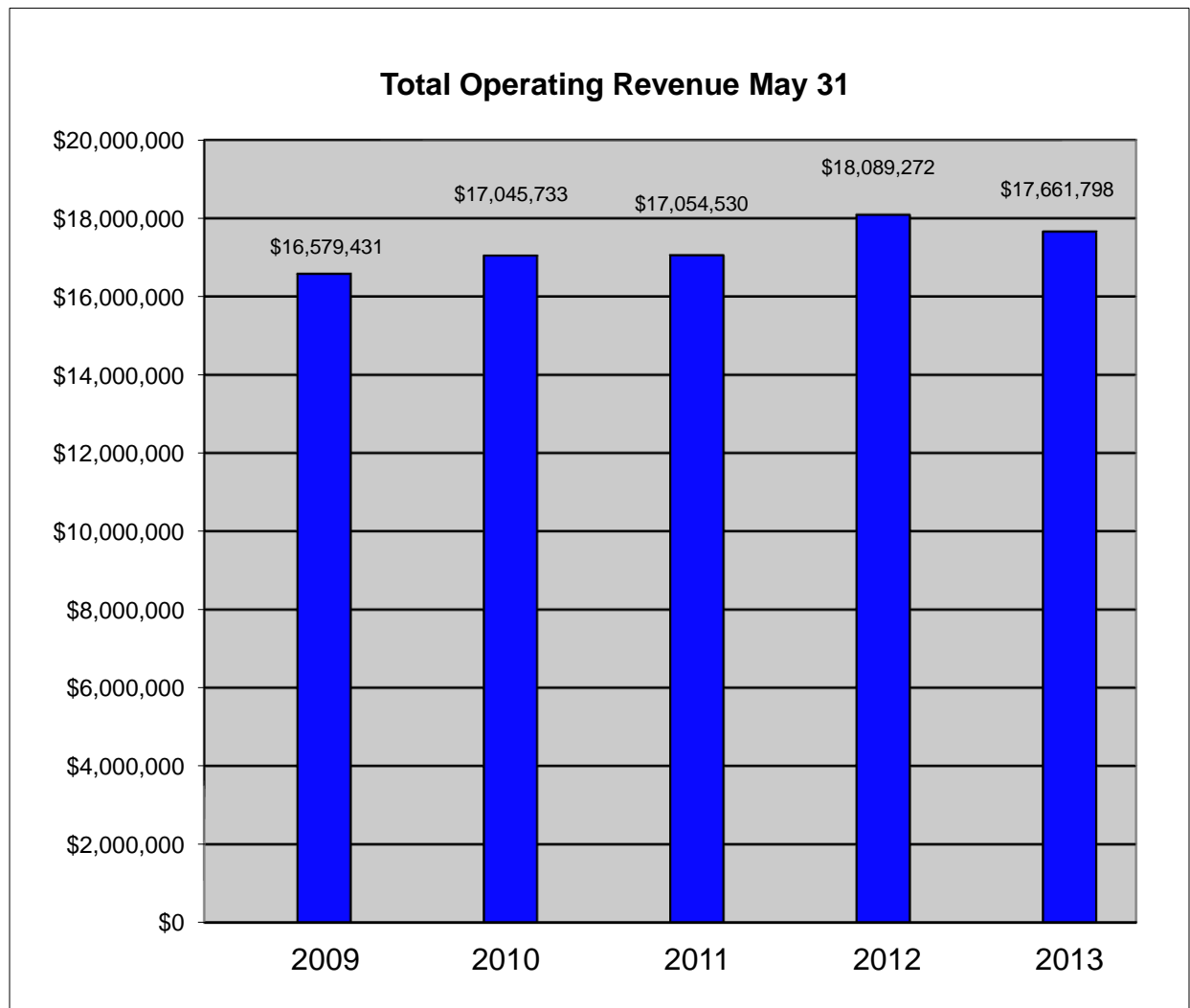
- Maintained a total level of support to the Campus at \$1,183,607
- Maintained FSA Board Program allocations at \$685,000
- Maintained Space & Utility charge support at \$500,000 (originally budgeted for 550,000) which includes a \$350,000 special assessment for SUNY budget reductions
- Opened Tim Hortons in the renovated Williams Center
- Completed an 8,000 square foot outdoor patio adjacent to the Williams Center, with soft lounge and Teak seating, umbrellas and a trellis
- Managed through the difficult process of downsizing operations by closing Marketplace at Erie Dining Center in May 2013. Gross revenue declined \$427,474 as a result of lower enrollment, and additional operating costs of \$582,564 were incurred to operate Tim Hortons
- Several other cost saving measures were implemented, some of which were: reducing merchant service fees by changing providers, changing cash handling practices which resulted in a reduction in bank fees, and restructuring catering staff, etc.
- Developed the 2013-2014 operating budget based on \$18,428,195 in revenue and will return net revenue under expenditures of \$48,283 or -.3%

Statistical Data

- Total revenue from operations totaled \$17,661,798 representing a 22.4% decrease from the previous year
- Program allocations budgeted for expenditure during the 2012-2013 academic year totaled \$685,000, serving 48 campus groups and organizations
- While providing the high level of support, net results from operating and non-operating activities yielded a sizable negative change in Net Assets of \$444,461

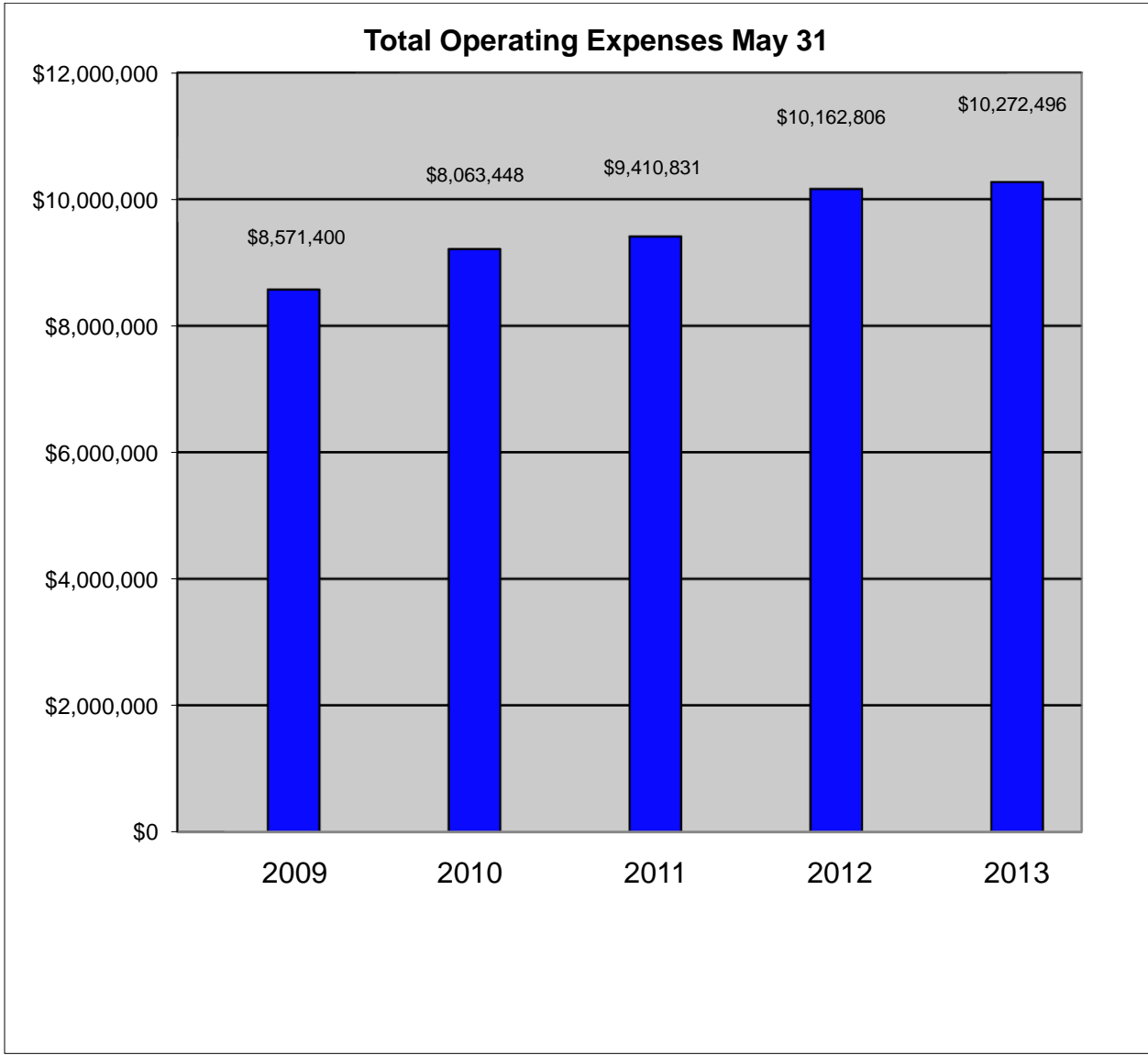
FACULTY STUDENT ASSOCIATION OF STATE UNIVERSITY COLLEGE AT FREDONIA, NEW YORK, INC.

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



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

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



Assessment Update

Assessment Statement

The annual independent audit resulted in an unqualified audit opinion and the auditor's internal control recommendations were implemented where appropriate. The annual budget was reviewed in depth with the Audit/Budget Committee of the FSA Board prior to unanimous Board approval.

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

Assessment Activities

Assessment Goals

- Continue to re-assess internal controls with focus on inventory controls to enhance the financial integrity of the organization
- Enhance Corporate marketing to educate the consumer and grow revenue
- Improve operational efficiency by analyzing labor utilization in services provided

Bookstore/Retail Operations

Annual Report

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



From left to right, seated: Katie Brown and Tina Reilly; back row: Jeff McMinn, Kimberly Fancher, Jaime Welka, Laura Lynden, Yvonne Wright, Leslie DeWolfe, and Sharon Hogg

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

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

Apple Inc. has changed parameters to its Apple on campus program that will allow qualified university affiliated personnel to purchase Apple computers and peripherals at academic discount prices.

Retail Operations oversee vending machine operations throughout campus that are sub-contracted to Next Generation Vending. Retail Operations handles a majority of the service calls and other customer service issues with vending.

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

Significant Accomplishments

- Implemented textbook rental program
- Increased product line for giftware, electronics, clothing, and school supplies
- Ensured that all vendors of imprinted merchandise complied with the University Trademarks and Licensing Program
- Revised the product mix of the Dorm Survival Kit
- Increased sustainability efforts throughout the Bookstore, Starbucks and the Convenience Store to include recycling of all consumables as well as stocking environmentally friendly products when possible
- Maintained mandates outlined in the Federal Higher Education Opportunity Act



FREExpress

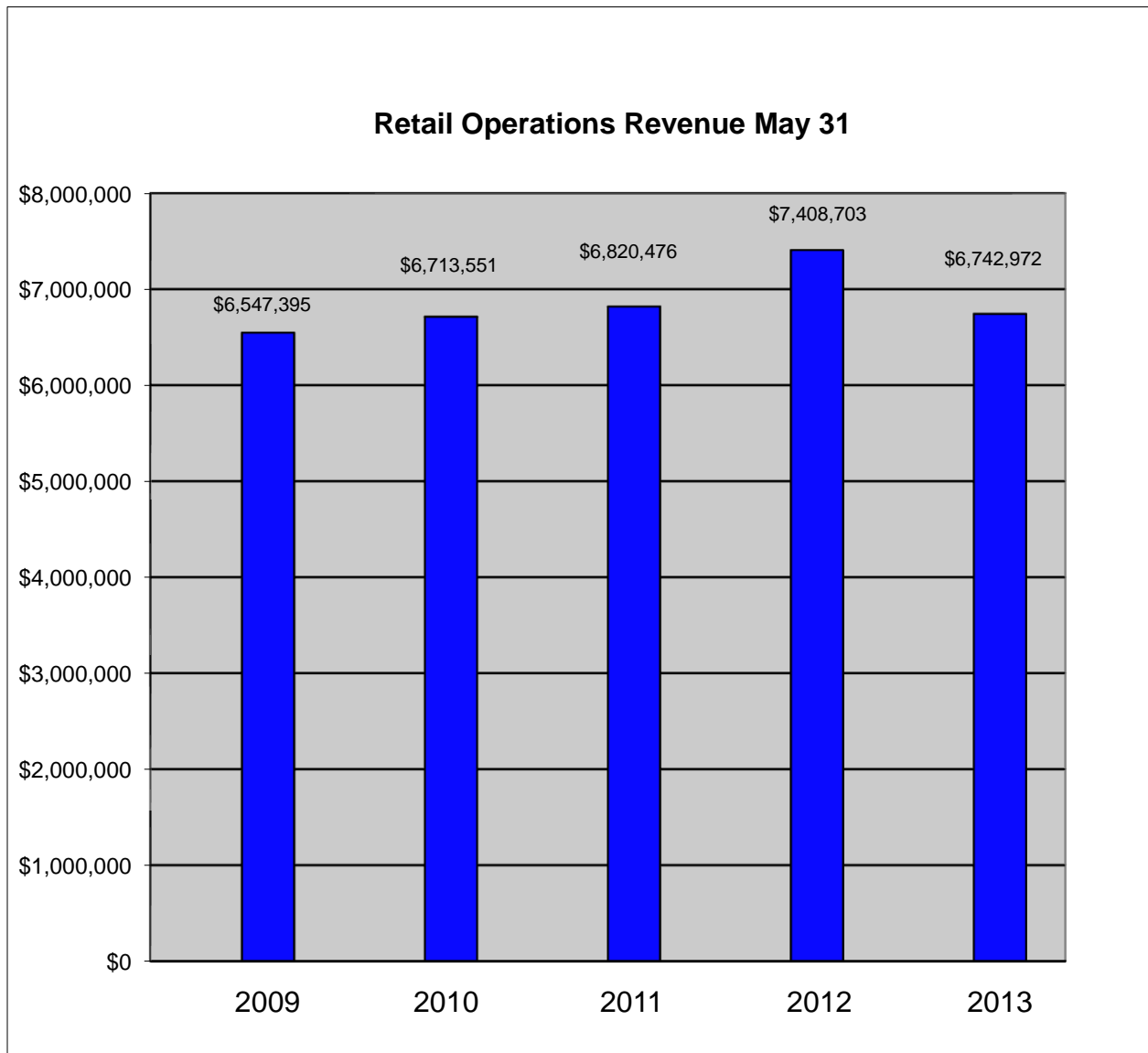
From left to right: Stephanie Geney and Tricia DeJoe

Statistical Data

- Debit Accounts decreased by 566 participants to 1,886 in fall 2012, from 2,452 in fall 2011
- Revenues for the 2012-2013 fiscal year were \$6,742,972 compared to \$7,408,703 in 2011-2012, a decrease of 9.0%
- Fall of 2012 Textbook Pre-packs totaled 667 with 122 deliveries to residence halls; a decrease of 5.9% and an increase of 7.8%, respectively
- Net Revenues decreased 13.3%
- Operating expenses decreased \$180,085 or 6.9%

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

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



Assessment Update

Assessment Statement

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

Assessment Activities

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

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

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

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

Assessment Goals

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

- Assess space utilization of store and warehouse
- Assess product selection to reflect the needs of the Fredonia campus
- Evaluate student employee training procedures for the store and revise as needed in order to increase annual retention rates
- Maintain 100% compliance with the college-licensing program
- Maintain compliance with Higher Education Opportunity Act
- Decrease lead time between ordering and receiving of imprinted merchandise
- Enhance Fredonia imprinted merchandise with increased selection. Work with vendors to decrease minimum orders allowing for less investment in inventory
- Continue to develop a campus wide marketing program
- Enhance Starbucks lunch program with increased menu items following Starbucks mandated ingredient guidelines

- Continue to search for environmentally friendly general merchandise options for the Bookstore
- Enhance online shopping presence and marketing efforts offering new and innovative products to the Fredonia students, faculty, staff and alumni
- Refine product mix for the FredExpress convenience store in Thompson Hall
- Look for new and interesting social media marketing opportunities
- Implement faculty relations program to increase textbook adoption rates
- Explore and increase product mix from local vendors
- Implement VERBA software to the sunyfredoniabookstore.com website allowing students to shop and compare textbook prices to reduce loss of market share

Dining Services

Annual Report

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

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

The Dining Services staff consists of full-time management employees, full-time CSEA employees, part-time CSEA employees, and part-time student employees.



Cranston Marché

From left to right: Samantha Dloniak, Susan Maggio, Mary Brown, Pat Wilde, Ashlie Hall, Diane Woloszyn, Brenda Butler, Debra Seavy, Nancy Rowland, Jill Phillips, and Felicia Nowak



Centre Pointe

From left to right: Rita Zambotti, Diane Mekus, Jen DiRusso, Cheryl McCoy, Darlene Brinkman, Allison Kozlowski, Lynne Montague, Cindy Holcomb, Rick Kirchenwitz, Millie Stanton, Garrett Grant and Emily Szentgyorgyi



El Diablo Azul

From left to right: Ann Leone, Lexi Conner and Rita Zambotti



Tim Hortons

From left to right: Mary Zielinski, Shannon McHugh, Michelle Congdon, Moriah Keddie, Tiffany Kujawa and Mike Raimondi



Café Mason

From left to right: Mindy Welka and Stephanie Maher



Café McEwen

From left to right: Lisa Stoneham and Jennifer Bollen



Café Fenton

From left to right: Kyle Tobin and Jennifer Rivera



Catering Office

From left to right: Jeff Walter, Linda Kurgan Monaco, Katie Thies, Mark Kinney and Dean Messina

Significant Accomplishments

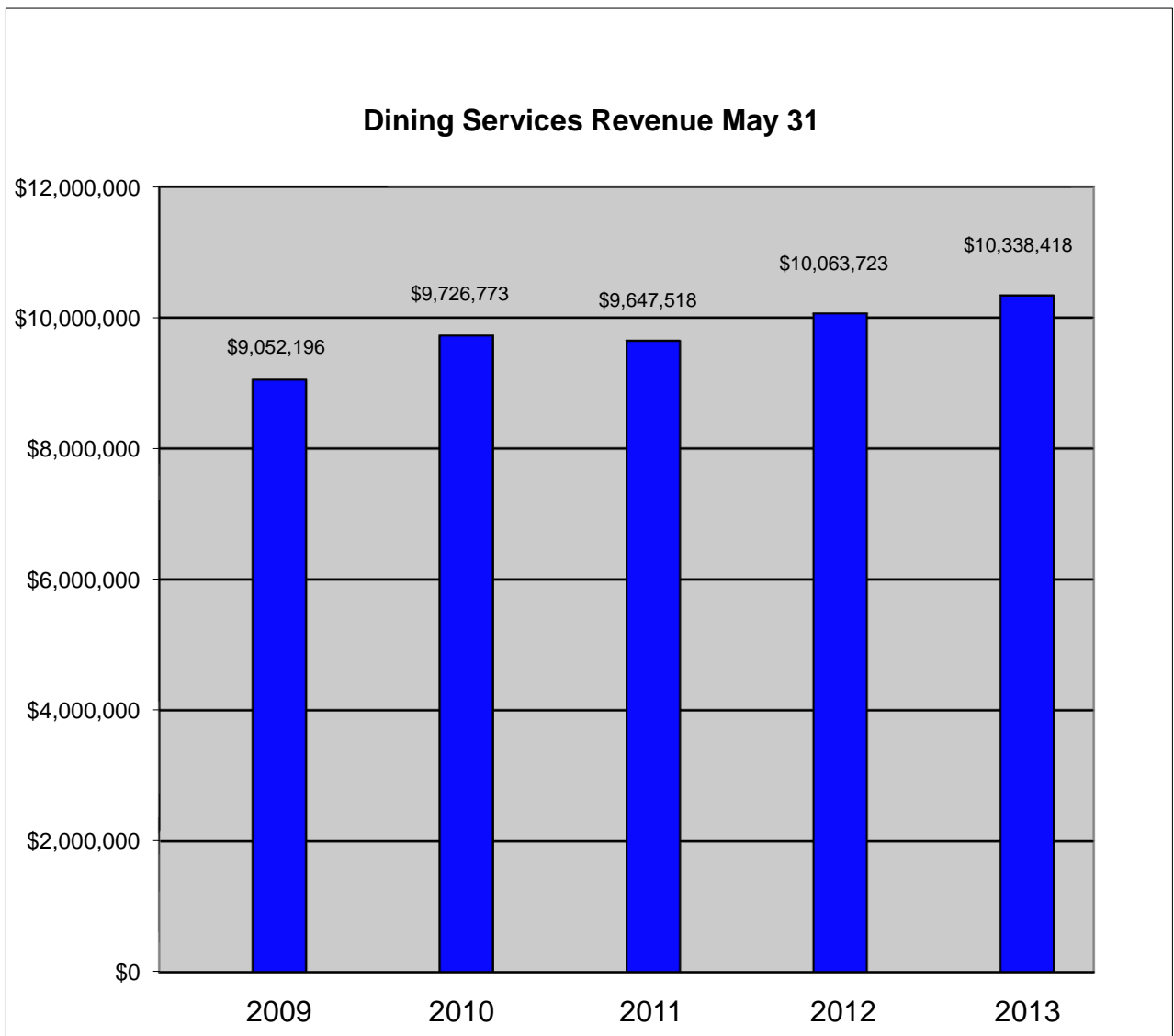
- Achieved greater operational effectiveness, enhanced profit extraction, and increased levels of quality customer service by self-operating FSA Cafes and Concessions
- Continued the “Spring into Fall” Program introducing test runs of potential new menu items in Trendz and Centre Pointe based on customer feedback
- Featured Special Theme and Holiday Dinners
- Streamlined catering planning guide, updated pricing, and created Wedding planning guide to increase both catering and lodge revenue
- Continued internal web-based sanitation training, complimented by hands on instruction
- Accomplished Sustainability efforts which include further data collection and analysis regarding trayless options, increasing our local purchases to 15.5%, and planning for pre-consumer waste tracking in all units
- Continued to develop our relationship with primary vendor Maplevale Farms, and evaluated and selected new products to increase cost of goods efficiency
- Proactively engaged food brokers, most of whom underwent major consolidations, to increase cost of goods reduction programs
- Provided personalized attention for the increasing number of students with dietary and medical dining restrictions
- Interviewed and evaluated management staff to identify their aspirations, skill sets, and potential reassignment or promotional opportunities
- Expanded Café offerings to include bottled tea, hot breakfast, and hot lunch sandwiches

Statistical Data

- Self-operated Dining Services revenue for the 2012-2013 fiscal year was \$10,338,418 compared to \$10,063,723 in 2011-2012, an increase of 2.7%
- Meal plan enrollment decreased by 170 participants to 3,611 in fall 2012, from 3,781 in fall 2011; a 4.5% decrease for the fall 2012 semester
- Net Revenues increased 2.7%
- Operating expenses increased \$289,255 or 4.1%

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

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



Assessment Update

Assessment Statement

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

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

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

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

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

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

Assessment Activities

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

The Sustainability Committee membership provided insight into pre-consumer and post-consumer waste, the bottled water issue, and local purchasing initiatives.

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

Evaluated and fine-tuned the dining hall menus to provide a variety of choices for the diverse campus clientele.

Assessment Goals

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

- Continue the “Spring into Fall” new menu item rollouts
- Renovate Centre Pointe to add Yolato frozen yogurt, a home-style station, an Asian quick-serve, a stir-fry station and a self-serve salad bar
- Improve Centre Pointe product offerings such as chicken fingers, potato chips and sub rolls

- Convert Trendz to El Diablo Azul, a Mexican Grill with fresh burrito, rice bowl and taco offerings
- All recipes will be developed by FSA staff
- Plan short and long-term operational response to anticipated enrollment decline trend
- Market all units to increase customer awareness via various media
- Plan for management development and cross training to foster continuity of all facilities
- Develop Operations Manuals for all units
- Develop training program for all management staff, regular employees, and students
- Evaluate menu items, recipes, and product specs to effectively control anticipated significant increases in cost of goods
- Implement the Dining Services Sustainability Program which includes pre-consumer and post-consumer waste reduction programs, converting to greener disposable service ware, expanding recycling possibilities, use of local suppliers, and evaluating trayless initiatives in all units
- Continue prompt and thorough responses to comment cards and e-mails
- Develop more sophisticated food and labor cost monitoring and control tools
- Change Café coffee brands to freshen up operations and improve future opportunities

Human Resources

Annual Report

The Human Resources staff currently consists of two full-time management employees. The HR department is responsible for staffing management, CSEA, and student employees. Responsibilities include interpretation of contract, employee handbooks, and policies and procedures. Also performs payroll functions and administers pension, health insurance, and dental plans for Management, CSEA and Student employees.

The FSA Corporation consists of 81 full-time management and CSEA employees, 98 part-time CSEA employees, and 275 student employees.

Significant Accomplishments

- Finalized 2013-2014 employee labor budget
- Implemented the negotiated labor contract process of layoff and bumping as a result of closing Marketplace at Erie
- Coordinated Annual Employee Orientation meeting
- Updated all employees on the "Right to Know" law
- Maintained Wage Theft Prevention Act Compliance
- Provided Workplace Safety training to all employees
- Implemented "Lose 10" Wellness Program
- Hired new Dining Services Supervisors and Starbucks Supervisor
- Held Annual Student Recognition Banquet
- Recognized Employee of the Semester and Years of Service
- Completed orientation for all new CSEA and management employees
- Implemented new Health Insurance Plans and a new Dental Plan
- Conducted safety audits in each work location
- Provided monthly safety, wellness, and management training material
- Provided cut resistant gloves to all employees using knives
- Organized confidential file room for Human Resources related material
- Researched and acquired new insurance company to provide NYS Disability benefits
- Successfully resolved 22 grievances

Statistical Data

- 140 FSA employees attended Annual Orientation Meeting
- Hired 4 new employees

Assessment Update

Assessment Statement

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

Assessment Activities

- To help ensure fiscal compliance, continuation of the biweekly report of budget vs. actual hours worked
- Meet regularly with management staff to review employee policies and procedures outlined in employment handbooks and union contract
- Meet with Worker's Compensation insurance representatives to provide a safe work environment
- Perform ongoing inspections of work locations regarding the proper labeling for new materials including input into the Material Safety Data book
- Prepare review of monthly unemployment experience rating to ensure compliance
- Assure Department of Labor Compliance by posting Wage Theft Prevention Act information
- Perform NYS New Hire Reporting with health insurance eligibility requirements
- Ensure proper payment of wages and deductions for all employees
- Maintain confidentiality of all employee personal information and data

Assessment Goals

The assessment goal of Human Resources is to become a resource base for all FSA operations to increase efficiency.

- Meet with all new employees to review Employment Handbook, Contract, Safety Manual, and job descriptions
- Continue to investigate implementing Wellness and Smoking Cessation programs
- Meet with each employee annually to increase employee awareness of individual benefits including, retirement, SRA, health insurances and EAP programs
- Conduct annual employee evaluations for CSEA and Management employees
- Develop training program to ensure all new employees are properly trained in all areas
- Remain up to date on current procedures and retirement options, and work with TIAA-CREF representative to provide individual counseling to employees
- Review examinations for all CSEA positions that require testing
- Research educational opportunities for Management Staff
- Provide continued training and protective equipment to decrease work related injuries such as cuts, burns, trips and falls
- Research other payroll companies for a more cost effective, user friendly system
- Brainstorm ideas to build morale

Information Technology

Annual Report

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

The Information Technology staff currently consists of three full-time management employees.

Significant Accomplishments

- Developed myFSA to allow students to manage their Meal Plan, Debit Account Plan, Textbook Pre-Pack and Survival Kit online
- Programmed Tim Hortons' complex menu options into Point of Sale System and implemented Kitchen Display System
- Implemented Intrusion Prevention System on critical networks
- Awarded RFP for new Digital Cable TV System to DFT Communications
- Installed iCLASS card readers on all cash registers and FSA administered card access doors

Statistical Data

- 5,007 add-on online deposits through the MyFREDCard.com website, totaling \$370,146.95
- 1,627 Help Desk tickets submitted

Assessment Update

Assessment Statement

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

Assessment Activities

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

Assessment Goals

The assessment goal of Information Technology for next year is to develop and implement new mobile apps and technologies that will directly benefit customer interaction with FSA.

- Develop and design digital menu board system to replace previous expensive proprietary system in Centre Pointe and El Diablo Azul
- Launch newly designed College Lodge website
- Relocate Cable TV System Headend and install new digital system
- Develop FSA mobile apps
- Develop online ordering system

Special Events, Marketing, Licensing

Annual Report

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

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

Significant Accomplishments

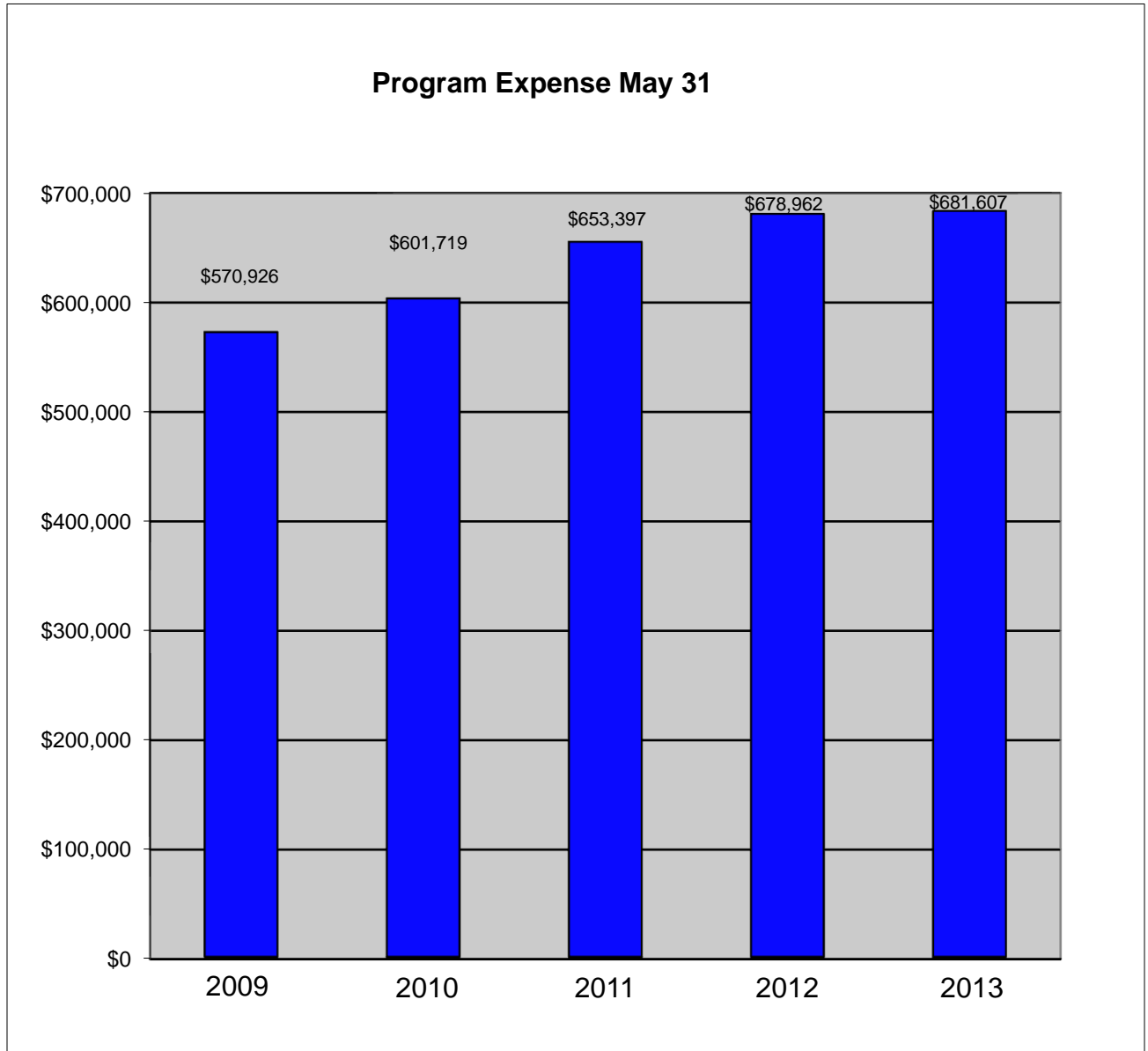
- Coordinated the planning and implementation of all marketing for the 2012-2013 Academic year, which included special events in both Dining Services and Retail Operations
- Continued to expand social media marketing efforts
- Presented the Administrative Services Orientation DVD at the 2012 New Student Summer Orientation sessions
- Coordinated all 2012 summer conferences, which included: The Quartet Program, two NYSSSA (New York State Summer School for the Arts) programs, the School of Choral Studies, the School of Visual Arts, the Rotary Youth Leadership Academy (RYLA) , and both the EDP and Upward Bound Summer Programs
- Continued involvement as emeritus of Chautauqua Leadership Network (CLN)
- Began reserving weddings at the College Lodge for summer 2013

Statistical Data

- 14 residential summer programs on campus
- 15 summer day programs on campus
- 5 residential summer experiential training programs at the College Lodge
- 6 summer day experiential training programs at the College Lodge
- 1 week long summer program at the College Lodge
- 86 licensed vendors

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

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



Assessment Update

Assessment Statement

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

Assessment Activities

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

Regular monitoring of licensing procedures has helped to promote the production and sale of Fredonia merchandise, both on and off campus. The 2012-2013 fiscal year represented another good year for SUNY Fredonia's royalties.

Encouraged open communication with all faculty and staff via the Special Events Committee to ensure successful programs for our conference groups.

Assessment Goals

- Continue to market all FSA operations
- Continue to promote the College Lodge and the Experiential Training Program
- Work on promoting the College Lodge as a wedding venue
- Continue to provide and strengthen the conference coordination needs of the campus community and outside clients through membership in the Association of Collegiate Conference and Events Directors – International (ACCED-I) by attending seminars, sessions and workshops at the regional meeting and the annual conference
- Continue to foster relationships with faculty and staff via the Special Events Committee and other campus constituents to ensure successful campus experience for our conference groups
- Continue to monitor, train, and approve the numerous needs of Trademarks & Licensing by licensed and non-licensed vendors, students, and the campus community
- Develop creative advertising to inform the entire campus community about the many services available throughout our campus, and continue to collaborate with other members of the State Auxiliary Services Association (SASA) Marketing group, both at meetings held once a semester and via e-mail
- Assist other FSA management with the continual need to inform students of any changes, additions, and deletion of policies and procedures regarding the services we provide for them at SUNY Fredonia
- Remain an active member of the Chautauqua Leadership Network (CLN) by serving as a committee member, assisting as a facilitator at the retreat weekend, and providing support for the growth of other SUNY Fredonia members in the CLN network

Support Services

Annual Report

Support Services adapted to the major changes in operations brought on by the ever-changing desires of the students. Additional products and services, varied delivery schedules to maintain fresher product, and increased demand stretched our resources. Starbucks Coffee and FRED-Express increased the food production in Central Prep with new menu items and higher demand.

The Support Services group continued with 5 full-time management employees, full-time CSEA employees, part-time CSEA employees and student employees.



From left to right, front row: Fred Tripp, Toni Bausum, Amanda Reading, Bob Watson, Lesa Drummond, Linda Willoughby, Lindy Stranahan; back row: Jeff Keddle, Julie DePasquale, Dennis Kaiser, Ron Mirek, Josue Roman, Craig Moore, David Lewis, Chris Sipp and Kim Collins

Significant Accomplishments

- Completed more than 645 work orders
- Cleaned and maintained all FSA operated facilities
- Met with a NYS Forester and received a written proposal, which was unanimously approved by the College Lodge Advisory committee and the FSA Board.
- Provided Experiential Training Program for 500 participants in 2012-2013, which reflected a decrease of over 23% from the previous year. Several large customers did not come back due to changes in Leadership of their programs and scheduling difficulties on our part. The loss of Medaille College, Niagara University, Clarence Central School and The Mocha Center accounted for over 200 less participants than the previous year.
- Continued to expand operations of Central Prep by adding new items with Starbucks, FREDEXpress, and the Convenience Store

- Added a replacement vehicle to the fleet for Commissary transportation
- Re-routed and combined deliveries for better utilization of equipment and cost savings
- Purchased replacement front windows for the main Lodge
- Planned a makeover of Centre Pointe to include the “Best of Erie”, a new Asian Concept, self serve salad bar, soft serve ice cream, and a Mexican theme.
- Developed a pizza dough recipe in the Bakeshop to replace pizza dough purchased from outside vendors

Statistical Data

- Revenues from Support Services for 2012-2013 totaled \$580,408 compared to \$616,846 in 2011-2012, which is a decrease of 5.9%
- Revenues from natural resources were \$2,851
- Operating expenses remained flat with no percentage change

Assessment Update

Assessment Statement

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

Assessment Activities

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

Assessment Goals

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

- Implement a management plan at the College Lodge that takes into account the biological survey currently being conducted and the concerns of the campus community
- Continue to market FSA’s Experiential Training Program at the College Lodge
- Update menu choices to meet the ever-changing demands of our customers and maintain product freshness
- React in a timely manner to meet our customers’ expectations
- Plan for the additional support and logistics for the new Science Building Café
- Assist in the renovation of our buildings and equipment to meet the changing demands of our customers
- Expand additional fresh baked items into the Convenience Store and FredExpress

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Human Resources

HUMAN RESOURCES

Introduction

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



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

Mission Statement

The core mission of Human Resources is closely aligned with the university's vision. The mission statement was recently updated to reflect the values of the HR team as well as to clarify the contribution the department makes to the university. Human Resources seeks to attract and retain the best-qualified applicants by constantly promoting SUNY Fredonia as a "Great Place to Work." Specifically, Human Resources' Mission statement is:

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

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

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

Annual Report

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

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

Significant Accomplishments

- Continued to improve communication between HR and the campus community. HR utilized its updated website, listservs, and campus mailing to update employees on such issues as: vacancy announcements, retirement planning, retirement vendor educational seminars, updates to various insurance programs, Civil Service exam information, etc.
- In concert with Academic Affairs and UUP, completed and introduced the Handbook on Appointments, Re-appointments and Promotions (HARP)
- Hired a new Employee Assistance Program Coordinator
- Developed and introduced FREDTraining to campus
- Introduced Interview Exchange as Fredonia's new on-line applicant tracking system
- Developed and introduced an on-line benefit orientation program for part-time faculty and professional staff.
- Responded to an Equal Employment Opportunity Commission (EEOC) complaint and resolved the matter short of a hearing
- Responded to a Hostile Work Environment claim. The claim was subsequently found to be without merit
- Continued fact-finding to assist in responding to a federal suit
- Responded to an Improper Practice Charge filed with the NYS Public Employee Relations Board by CSEA Inc.
- Conducted in-person Prevention of Workplace Violence training program for classified staff and Professional staff in Facilities Services
- Utilized PeopleAdmin/Interview Exchange to conduct 67 searches and trained 295 PeopleAdmin/Interview Exchange search committee users

- Coordinated seven employee benefit consultation days with TIAA-CREF, three days with MetLife and two days with the New York State Deferred Compensation Plan. Additionally, each vendor gave one group presentation in the Spring and Fall semesters affording university staff direct vendor contact and expertise
- Distributed 35 recruitment brochures to support the hire of Faculty, Professional & MC staff
- Updated nine benefit brochures representing each bargaining unit. The pamphlets summarize the various benefits provided to employees. The brochures are available to all hiring managers to assist them in their recruitment efforts and also to position Fredonia as an "Employer of Choice"
- Revised various Reporting Services reports and queries to assist university Administration in managing such HR issues as: salary administration, reclassification, ethics compliance and employee renewals
- Continued to produce automated renewal/non-renewal notices to assist supervisors and VP's in the reappointment or non-renewal of all non-teaching professionals
- Produced the 2012-2013 campus Phone Directory
- Provided Community Service via active participation on the following committees: SUNY WNY Regional Consortium, SUNY HR Executive Committee Rewards and Recognition Committee, Campus Affirmative Action Committee, Chautauqua Leadership Network, Employee Assistance Program Committee, SUNY Fredonia Federal Credit Union Board, Council for Women's Concerns, Senate Planning & Budget Committee, Campus & Community Children's Center Board of Directors, Student Affairs Judicial Board, Veterans Recognition Committee, Professional Development Advisory Board, Professional Development Associates Program, Commencement volunteers, and State Employees Federated Appeal (SEFA) /United Way Committee
- Maintained positive and professional relations with campus unions
- Achieved 100% compliance with NYS Ethics reporting regulations
- Participated in NYS/CSEA Labor/Management Committee training with newly elected President

Statistical Data

- Distributed, received and processed 1,034 SEFA pledge forms that resulted in the campus raising \$48,699 (108% of goal!)
- Digitized inactive employee personnel files
- Received and filed 320 Performance Evaluations for Classified, Professional and M/C staff
- Received and filed 215 Performance Programs for Professional and M/C staff
- Established and monitored 10 Classified staff probations
- Opened or managed 26 Workers' Compensation cases
- Processed 2,359 SUNY HR and 160 New York State Electronic Personnel (NYSTEP) transactions
- Processed 1,675 COS forms
- Completed 338 pre-employment screens
- Processed new hires: ensured employment files established, paperwork prepared for payroll and appointment letters completed and benefits consultations provided

- Prepared and distributed separation letters
- Processed 44 promotions
- Prepared and posted 68 SUNY Fredonia vacancy notices (Classified, Professional and teaching positions) ensuring compliance with appropriate provisions of negotiated Agreements
- EAP programming for this cycle included: Producing and distributing monthly updates to the 12 Wellness Notebooks; distributing monthly “Reflections” signage throughout campus; coordinating “Take Your Sons & Daughters to Work Day” with other colleagues; managing the annual Wellness Fair; and offering Zumba classes
- Conducted salary analysis for four UUP-represented positions
- Analyzed and provided recommendations on six CSEA-represented positions
- Analyzed and provided recommendations on three MC positions
- Two Professional staff were non-renewed
- Processed 102 Tax Deferred Annuities (TDA) enrollments and changes
- Conducted orientation program for 20 faculty colleagues
- Conducted/created 11 Classified employee searches or job announcements
- Created and distributed bid sheets for internal, classified lateral transfers and promotions
- Created, distributed and coded canvass letters for competitive and classified searches
- Provided benefit consultations for new hires, retirees and those considering retirement
- Processed 451 Honorarium requests
- Personal retirement consultations were provided to a total of 81 employees by: ING, MetLife, TIAA-CREF and New York State Deferred Compensation Plans
- Six employees, their dependents and departments were assisted in dealing with Immigration issues
- Provided 70 Leave of Absence and FMLA consultations
- 120 employment verifications were conducted for such things as mortgage verification, UUP’s Tuition Assistant Program, the Tuition Waiver Program, issuance of ID cards, etc.
- Processed all requests from departments for labels and reports. Provided labels or information from labels printed directly onto mailings for Wellness Committee, SEFA, billing for employee telephone bills, EAP, Secretarial/Clerical Conference, etc.
- The past review cycle was again an active one for the Employee Relations functions. Specifics include:
 - Four CSEA grievances were filed by CSEA-represented staff. All were informally resolved at step 1
 - One PEF grievance was filed. The matter was subsequently resolved
 - Two grievances were filed by a UUP-represented employee. One was resolved at step one. The other was resolved at a later stage
 - One UUP step 2 hearing was held. The matter was subsequently resolved.
 - Two CSEA Time & Attendance Arbitrations were conducted. Two NOD’s were issued following the hearing
 - A New York State Department of Human Rights complaint was responded to via extensive research and fact-findings. A written brief was created and submitted. The matter remains under review

- Provided consultation and guidance on Research Foundation Employee Relations matters
- Two Notice of Disciplines and various counseling memos were issued

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

Assessment Update

Assessment Goals

- Successfully train colleagues on Interview Exchange, the new automated recruitment system
- Maintain positive relations with all campus unions
- Produce online benefit orientation for full-time UUP-represented professionals
- Develop Faculty and Professional staff Handbook
- Update the Handbook on Appointments, Re-appointments and Promotions (HARP)
- Continue to enhance FREDTraining by adding compliance training modules
- Complete Workplace Violence Prevention (WPVP) inspection and implement recommendations from worksite visits
- Continue to provide timely and accurate benefit advice and problem resolution for university staff
- In partnership with Facilities Services, complete Green Cleaning training program and conduct said program for all Custodial staff
- Produce 2014-2015 campus Phone Directory
- Provide leadership to both the SUNY HR Committee and the WNY HR Directors Consortium and support campus initiatives via participation in various committees
- Cross-train HR staff in discipline functions
- Enhance Reporting Services to the campus
- Assist in introducing a tobacco-free program to university

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Internal Control

INTERNAL CONTROL

Introduction

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

Mission Statement

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



Amy Beers

Annual Report

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

Specific activities under the direction of the Director of Internal Control include performance and evaluation of vulnerability assessments for SUNY Fredonia-identified high risk areas, internal control reviews of SUNY-specified high risk areas, investigations into situations warranting internal control review/audit, periodic distribution of paychecks for the purpose of reviewing employment and payroll procedures, periodic review of authorized cash handling/cash collection sites, periodic review of procurement card activity, issuance of periodic Internal Control *Fast Facts*, bank verification of SUNY Fredonia accounts, and analysis of revenue and expenditures within various IFR accounts. The Director of Internal Control is the TouchNet Marketplace Chief Administrator, the campus FOIL officer, and the campus record retention and disposition contact. In addition, all new IFR custodians are trained on the proper handling of funds and the biweekly Student Association payroll is reviewed and monitored.

Annual required reporting to the Office of the University Controller includes the preparation of the Internal Control Program Status Report, the Internal Control Certification signed by the President in response to Division of Budget (DOB) Policy B-350, the annual letter from the President to all campus employees, and coordination of the New York State Summer School for the Arts budget.

In addition, the Director of Internal Control is responsible for security administration of Office of the State Comptroller (OSC), SUNY, NYS Department of Civil Service, Statewide Financial System, TouchNet Marketplace, and the Research Foundation online computer systems. The Director of Internal Control chairs the campus-wide Internal Control Committee and the campus-wide Trademarks and Licensing Committee. Also, the Director is the co-chair of the campus-wide Information Security Program Team and the campus-wide Policy Advisory Group, and is an active member of various other campus-wide committees, including but not limited to the Council for Women’s Concerns, Clery Act Committee, FPAC and Building Safety Coordinators.

Significant Accomplishments

- Conducted semi-annual Internal Control Committee meetings
- Maintained the Internal Control Program structure and followed the established timeline for major events
- Completed one scheduled Internal Control review
- Distributed Internal Control brochures related to paychecks and the general Internal Control environment
- Successfully submitted responses to multiple FOIL requests

- Reviewed cash handling procedures in multiple departments
- Maintained a fully functioning Internal Control Program
- Maintained and expanded the TouchNet Marketplace by successfully developing 138 uStores and two uPay sites to date, totaling over 24,000 transactions and \$3.6 million in collected funds
- Assisted SUNY System Administration in two campus audits
- Assisted SUNY Legal Counsel in the creation of a SUNY-wide e-discovery RFI
- Chaired the Internal Control Committee, Chaired the Trademarks and Licensing Committee, Co-Chaired the Policy Advisory Group

Statistical Data

Marketplace Web Credit Card and Webcheck Payments						
Month	2008-09	2009-10	2010-11	2011-12	2012-13	% Increase/Decrease
						from Prior Year
July	n/a	\$1,592.00	\$14,298.34	\$38,924.29	\$48,274.46	24%
August	n/a	127.00	5,815.00	20,211.94	20,760.43	3%
September	n/a	4,598.00	16,698.64	17,699.09	230,384.75	1202%
October	n/a	13,596.00	154,350.00	113,504.98	96,595.33	-15%
November	n/a	2,335.00	9,934.64	145,925.14	160,676.16	210%
December	n/a	8,096.00	19,547.34	17,253.47	65,269.17	278%
January	n/a	30,075.65	147,979.99	162,676.76	135,192.15	-17%
February	n/a	5,241.60	35,490.81	96,429.62	71,320.58	-26%
March	n/a	3,510.00	64,909.13	98,529.67	155,344.18	58%
April	n/a	104,823.00	92,913.11	145,616.98	141,787.67	-3%
May	2,204.00	68,778.00	73,218.62	86,500.62	124,989.71	44%
June	790.00	46,995.50	60,174.71	55,193.91	64,412.87	17%
	\$2,994.00	\$289,767.75	\$695,330.33	\$998,466.47	\$1,315,007.46	
	#REF!	9578.28%	139.96%	43.60%	31.70%	

Marketplace Transactions						
Month	2008-09	2009-10	2010-11	2011-12	2012-13	% Increase/Decrease from Prior Year
July	n/a	12	332	494	460	-7%
August	n/a	11	367	524	533	2%
September	n/a	121	335	453	563	24%
October	n/a	186	424	373	481	29%
November	n/a	89	395	394	378	-4%
December	n/a	98	361	447	532	19%
January	n/a	227	492	570	477	-16%
February	n/a	156	448	596	495	-17%
March	n/a	189	411	405	351	-13%
April	n/a	1,002	755	847	708	-16%
May	23	776	706	701	992	42%
June	3	668	669	623	672	8%
Net	26	3,535	5,695	6,427	6,642	
	#REF!	13496.15%	61.10%	12.85%	3.35%	

Assessment Update

Assessment Statement

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

Assessment Activities

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

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

Throughout the past fiscal year, mandatory internal control reviews of pre-determined high risk areas, paycheck audits, and other activities were conducted as noted above. Recommendations were issued where weaknesses were detected and/or improvement opportunities noted. Timelines for implementation of recommendations were established with individual departments

along with projected timeframes for follow-up by Internal Control. Implementation of these recommendations reduces the likelihood that errors or irregularities will occur that could prevent the successful achievement of our goals and objectives. All audit findings and recommendations were also included in the Internal Control progress report prepared, and submitted as required, to System Administration and the Internal Control Summary that accompanied the Internal Control Certification signed by the President.

Assessment Goals

- Increase awareness of our Internal Control Program
- Continue campus-wide distribution of the Internal Control Brochure
- Conduct program reviews as required by System Administration
- Conduct unannounced reviews of procurement card activity
- Conduct paycheck audits at various locations across campus
- Provide training for new IFR custodians on the proper handling of receipts; provide “refresher” information to established IFR custodians
- Timely response to situations warranting internal control review
- Develop and issue campus-wide training on Internal Control
- Develop and issue informative monthly *Fast Facts*
- Continue to develop TouchNet Marketplace uStores and uPay sites in which campus departments will have the ability to sell approved products and services online. Identified locations of applicability include but are not limited to the following:
 - School of Music
 - Lifelong Learning and Special Programs
 - Reed Library
 - Theatre & Dance
 - AIT
 - RAC
 - Career Development Office
 - Student Health Center
 - Campus Life
 - University Police
 - Administration
 - School of Education
 - Facilities Services
 - Facilities Planning
 - Faculty Student Association
 - English Department
 - Financial Aid
 - Student Accounts
 - Intercollegiate Athletics
 - Registrar
 - International Education
 - Graduate Studies
 - Communication Disorders & Sciences

- Admissions
- Academic Advising
- Computer Science Department
- Field Experiences
- History Department
- Accounting Office
- Professional Development Center
- Environmental Health and Safety
- Foundation
- President's Office
- Residence Life
- Human Resources
- Alumni Affairs
- Research Foundation
- Sport Management
- Athletics
- EDP
- Student Association

University Services

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

UNIVERSITY SERVICES

Introduction

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

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



From left to right: Tracy Stokes and Terry Tzitzis

Mission Statement

University Services has a mission to provide the necessary support services to implement appropriate programs and services which enhance the academic mission of the University, and ensure that all State and SUNY regulations, guidelines and procedures are followed. Each of the areas under University Services strives to achieve the best services possible to faculty and staff to augment their performance and focus on the teaching and learning processes for our students. University Services strives to fulfill the University's mission in education, research, economic and cultural/social development of our students.

In SUNY Fredonia's Vision Statement, it states "Fredonia's professional staff will continue its strong contribution to student development and learning outside of class"; this clearly shows the direct relationship that all of the departments under University Services have between a student's education and the practical experience they gain in a business office. Through Work Study, Student Assistant and Internship programs, University Services has proudly given many students the opportunity to apply the classroom knowledge they have learned at Fredonia in a real business environment.

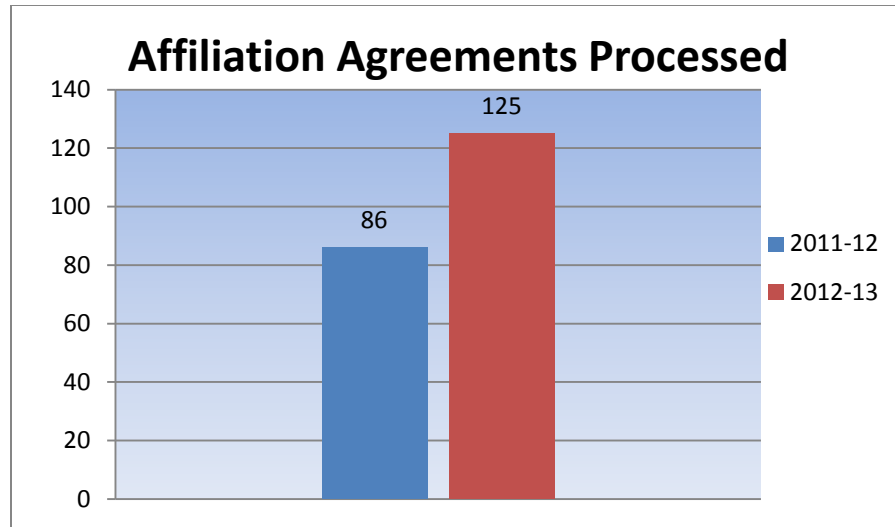
Equally important, University Services has gained from these very students that we are teaching. The statement "as a community of learners, we must respect both individual and cultural differences" reminds us that we too have learned so much from our students.

Annual Report

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

Significant Accomplishments

- Prepared and issued bids and contracts for assorted campus-wide services
- Reviewed and approved 125 affiliation agreements for the campus
- Contract renewal for Internet Service to the campus with a savings to the campus
- Two year contract renewal with Casella Waste Services for trash removal
- New Banking Services Agreements with M&T Bank
- Processed software/miscellaneous agreements
- For Collections, prepared and issued RFP for shared services with the Western NY Campuses
- Involvement with the Campus and Community Electronic Recycling Day
- Involved in the SUNY initiative of Shared Services
- Involved with the Administrative workshops for campus departments
- Served on the Board of Directors of the SUNY Purchasing Association
- Served on the Board of Directors of the Upstate New York Region of the National Association of Educational Procurement
- Attended the National Association of Educational Procurement national conference, SUNY Purchasing Association Conference, and the Fall Upstate New York NAEP/ SUNY Purchasing Association Conference
- President of the Board of Directors of the SUNY Fredonia Federal Credit Union and Chair of the Credit Committee.
- Member of the Sustainability Committee and co-chairman of the Recycling Committee



Assessment Update

Assessment Statement

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

Assessment Activities

- Maintained working relationships with all departments, providing guidance on the changes in policies and procurement rules and regulations
- Continued working relationships with the Office of State Comptroller (OSC), Attorney General, SUNY System Administration and the SUNY Counsel Office
- Served on the Western NY Shared Services for cost reductions committee
- Partial completion of combining Central and Mechanical storehouses
- For Shared Services with the Western NY Campuses, prepared and issued RFP for Collections

Assessment Goals

- Continue combination of the Central and Mechanical Storehouses
- Continue to work through the problems raised on the new SFS Financial system
- Continue working with the Western NY Shared Services group for cost reductions on services and products

Campus Photocopy Services

Annual Report

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

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



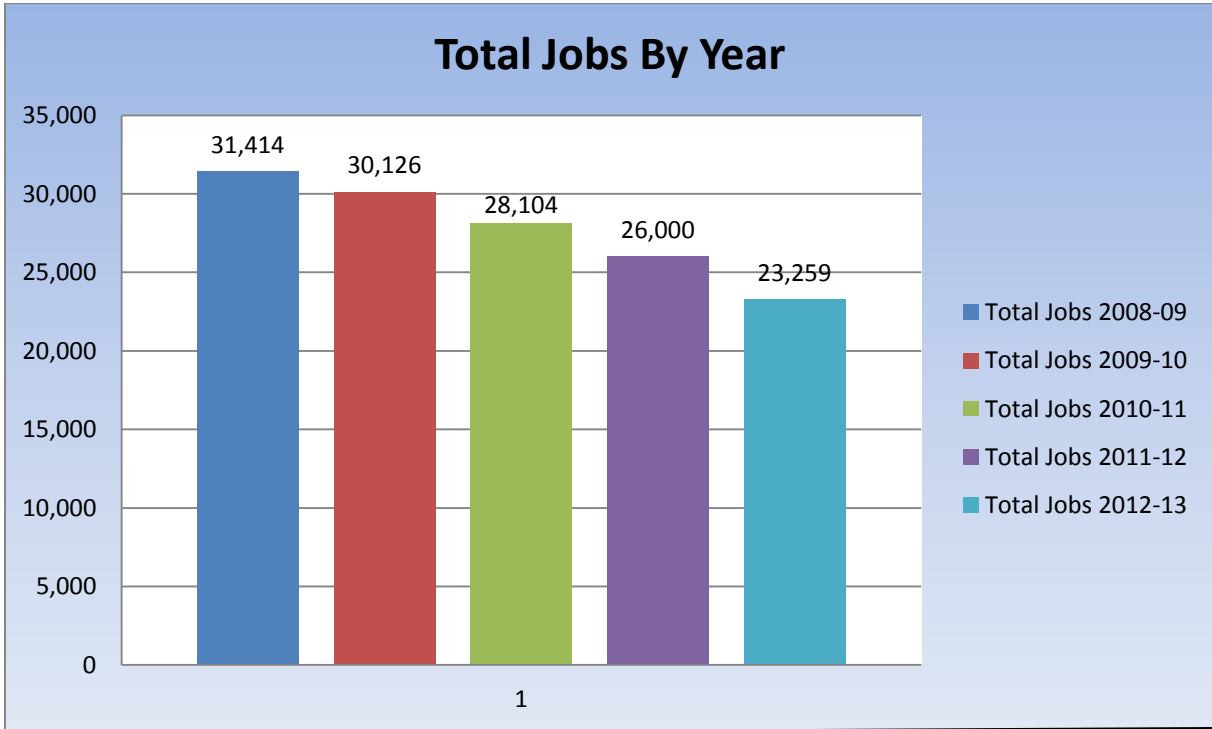
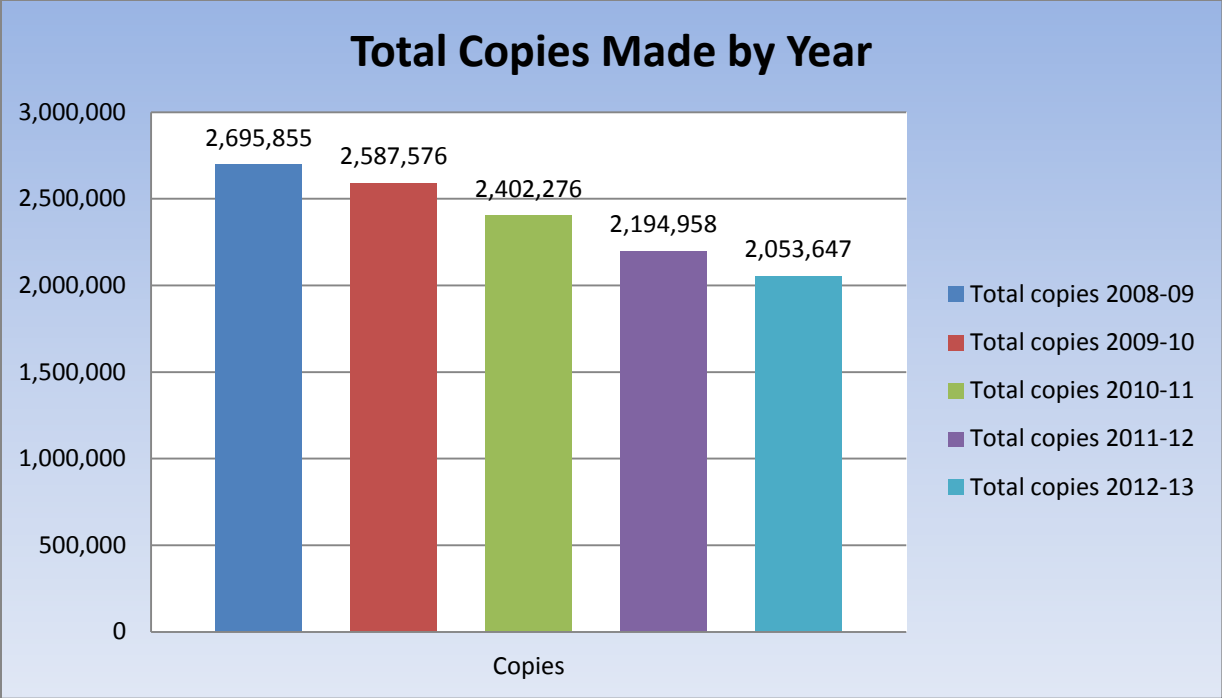
Carl Weiler

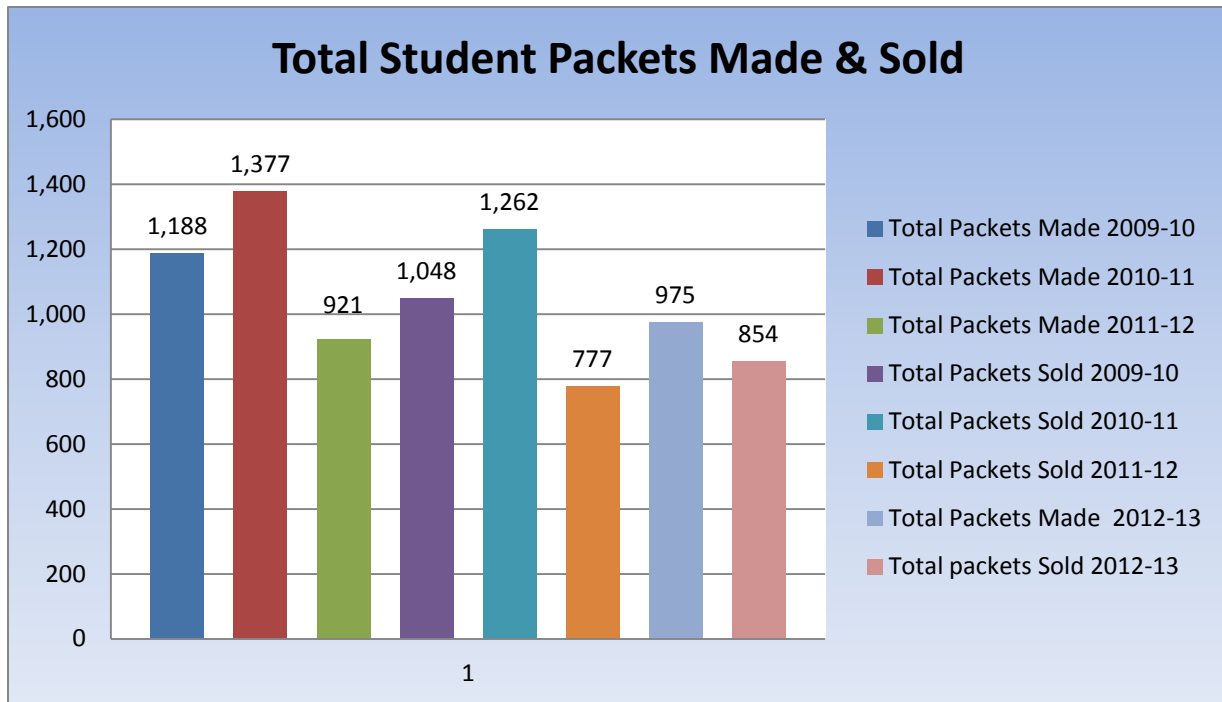
The costs at all centers are tracked to evaluate usage and possible future cost savings. This department was able to maintain the current pricing structure to the departments at the same cost as in previous years, even though some supply costs have risen. As machines age, we are replacing them with new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

The Campus Photocopy Services Department is staffed by a full-time Clerk I and three part time Green Thumb workers.

Significant Accomplishments

- Maintained cost to departments at same level as 2011-2012
- Replaced four campus wide copiers with new models with digital capabilities
- Reduction of photocopies made in 2012-2013 of 6.8%
- Use 100% recycled paper in our copiers
- There were 23,259 jobs with 2,053,647 copies made at the centers this year.
- We made 975 student packets, and we sold 854 packets this past year; this represents an increase of 5.8% in packets made, and an increase of 10% in packets sold





Assessment Update

Assessment Statement

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

Assessment Activities

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

Assessment Goals

- Upgrade Thompson Hall photocopy equipment that is over five years old to provide un-interrupted service to our customers
- Reduce the number of photocopies/cost

Central Receiving

Annual Report

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

Central Receiving was staffed by a Principal Stores Clerk (who is now retired), and one Stores Clerk 2.

Significant Accomplishments

- There were 31,319 packages received
- There were 569 common carrier, and eight truckload deliveries received

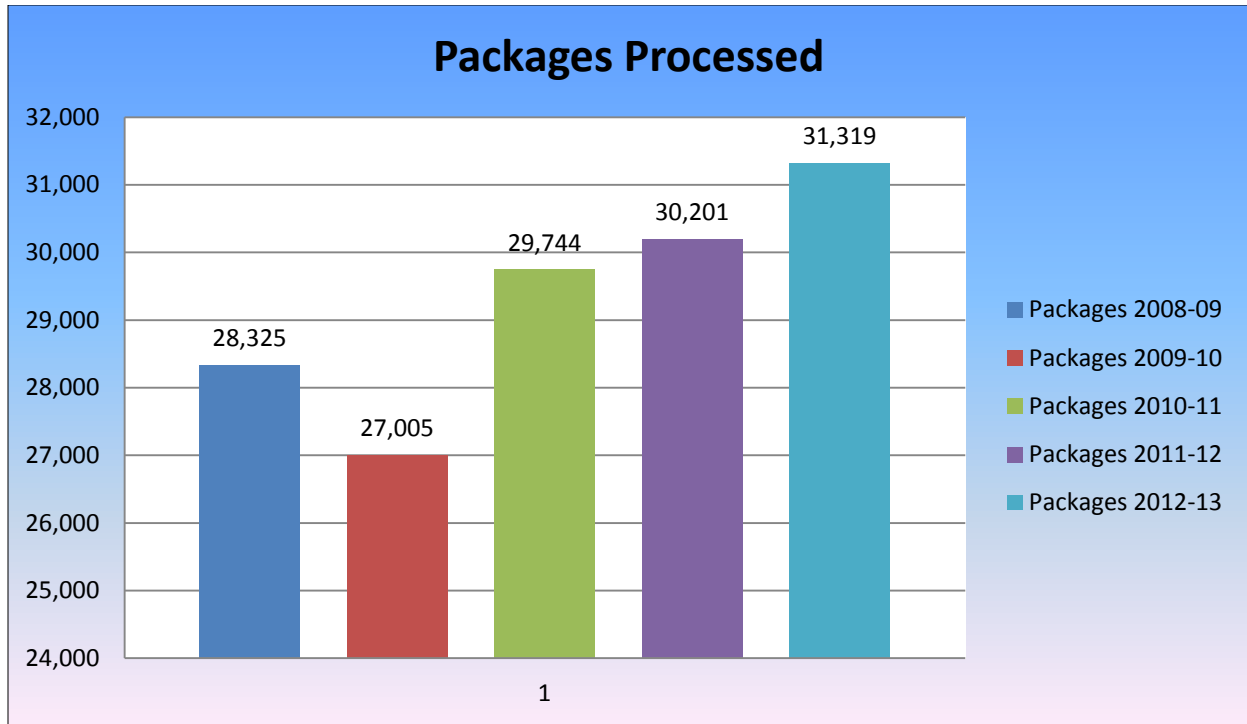


From left to right: Mason Riggle and John Hebner

Statistical Data

- | | |
|---|--------|
| • UPS packages received: | 24,700 |
| • Federal Express Ground Service packages received: | 4,123 |
| • Express (FedEX) packages received: | 982 |
| • Prestige packages received: | 1,514 |
| • Misc deliveries | 30 ** |
| • Common carrier deliveries received: | 501 ** |
| • Individual vendor deliveries received: | 82 |
| • Truckload deliveries: | 4** |

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



Assessment Update

Assessment Statement

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

Assessment Activities

- Central Receiving is evaluating our receiving/delivery systems to see where efficiencies can be made
- This department continues the consolidation of the mechanical storehouse to the central storehouse
- Central Receiving, Principal Stores Clerk retired
- Search for new SG-6 Clerk was conducted

Assessment Goals

- Improve delivery performance
- Evaluate area for cost reductions
- Train new Clerk in departmental duties/procedures

Central and Mechanical Storehouses

Annual Report

The Central Storehouse consists of custodial and office supplies and is responsible for over 300 SKU items with a value of \$168,478.25 at the end of June 2013. With the move to reduce our inventories and stay current with products on the market, it was decided to eliminate basic office supply items and envelopes. We were able to reduce our office supply inventory by 9.3%. The custodial supply inventory had increased by 14.0%.

The Mechanical Storehouse is responsible for over 2,000 SKU items with a value of \$250,820.09 at the end of June 2013. Items stored are for use by the trades departments (plumbing, electrical, carpentry, etc.) to make necessary repairs to buildings and equipment. This represents an increase in inventory by 7.0%.

We are still in the process of combining both storehouses into one area within the existing space constraints of central receiving to afford the efficient distribution of supplies.

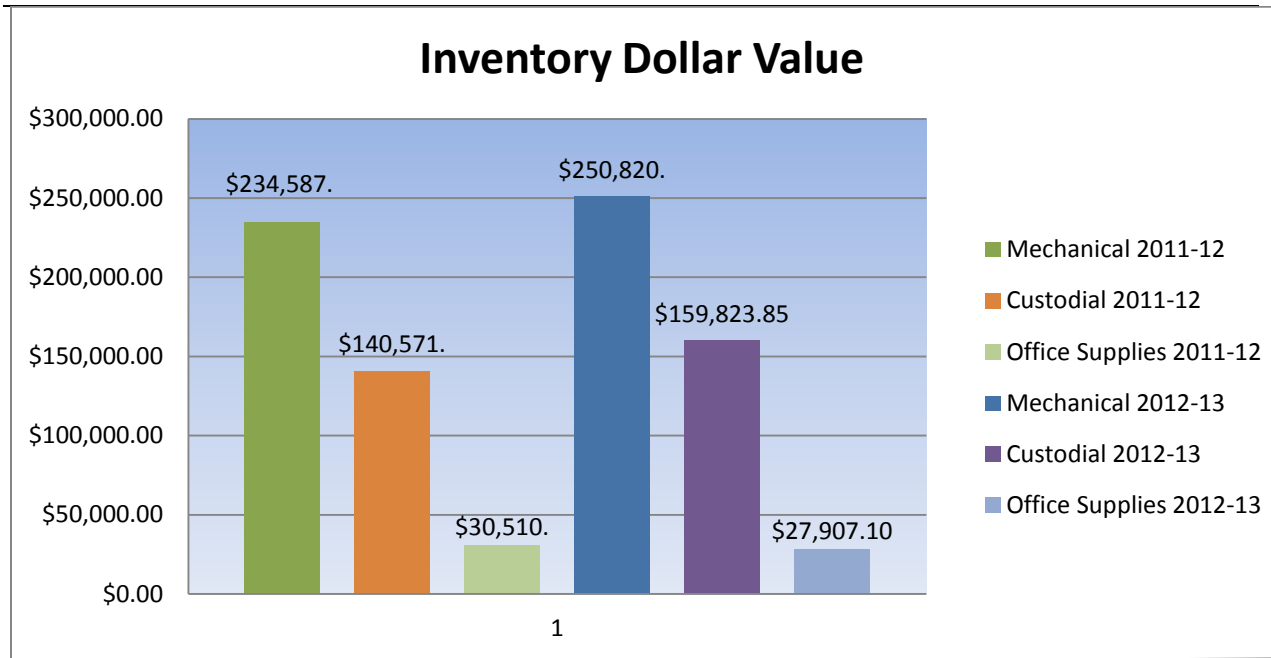
The Central and Mechanical Storehouses are staffed by the Central Receiving personnel.

Significant Accomplishments

- Office supplies inventory items were decreased by 9.3% over fiscal year 2011-2012; this brought the inventory to \$27,907.10
- Custodial supplies inventory items increased by 14.0% over fiscal year 2011-2012; this brought the inventory to \$159,823.85
- Mechanical supplies inventory items increased by 7.0% over fiscal year 2011-2012; this brought the inventory to \$250,820.09

Statistical Data

- Custodial supplies inventory: \$159,823.85
- Office supplies inventory: \$27,907.10
- Mechanical supplies inventory: \$250,820.09



Storehouse Inventory

	2011-2012	2011-2012	2011-2012	2012-2013	2012-2013	2012-2013
	MECHANICAL SUPPLIES	CUSTODIAL SUPPLIES	OFFICE SUPPLIES	MECHANICAL SUPPLIES	CUSTODIAL SUPPLIES	OFFICE SUPPLIES
July	\$187,831.80	\$111,967.06	\$32,086.04	\$237,155.87	\$150,216.80	\$26,415.06
August	\$190,711.16	\$110,014.01	\$55,626.94	\$242,043.78	\$151,022.97	\$51,510.93
September	\$197,684.46	\$132,797.81	\$49,303.00	\$243,327.04	\$164,984.85	\$47,702.52
October	\$202,236.85	\$152,030.84	\$43,266.03	\$241,549.94	\$162,019.06	\$41,443.77
November	\$217,587.68	\$150,829.56	\$39,635.46	\$241,232.71	\$162,659.00	\$34,517.75
December	\$222,305.15	\$164,793.07	\$36,845.21	\$232,452.66	\$142,313.14	\$29,978.91
January	\$221,331.95	\$156,373.11	\$27,230.49	\$246,281.99	\$149,163.56	\$25,007.05
February	\$225,929.55	\$154,211.96	\$53,245.18	\$248,530.69	\$164,036.21	\$23,017.19
March	\$224,485.14	\$160,413.71	\$46,019.98	\$251,800.01	\$142,672.48	\$42,906.32
April				\$254,070.20	\$143,937.80	\$39,395.26
May	\$222,281.99	\$162,910.72	\$34,143.14	\$253,821.74	\$167,264.60	\$30,349.91
June	\$234,587.87	\$140,571.15	\$30,510.61	\$250,820	\$159,823.85	\$27,907.10

Assessment Update

Assessment Statement

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

Assessment Activities

- This department was able to reduce our inventory of office supplies
- Work continues on consolidating Storehouses

Assessment Goals

- Consolidate Storehouses

Fleet Vehicle Services

Annual Report

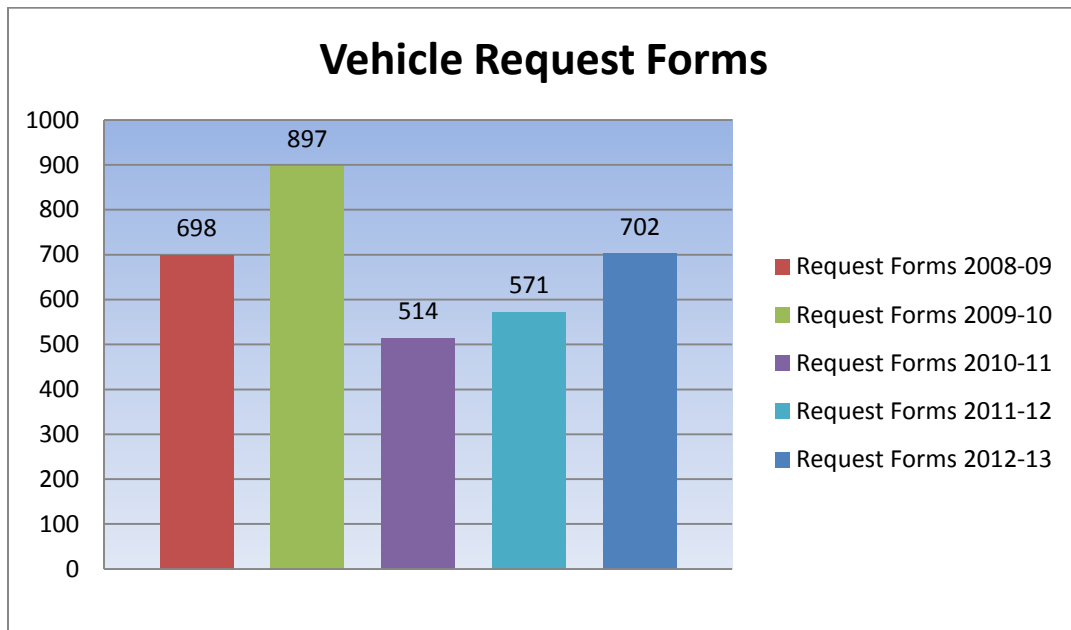
University Services is responsible for managing the campus fleet of vehicles. It is under the supervision of the Director of University Services and one clerical support person. The unit is responsible for the scheduling of all fleet vehicles for faculty and staff use. There are sixteen fleet vehicles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

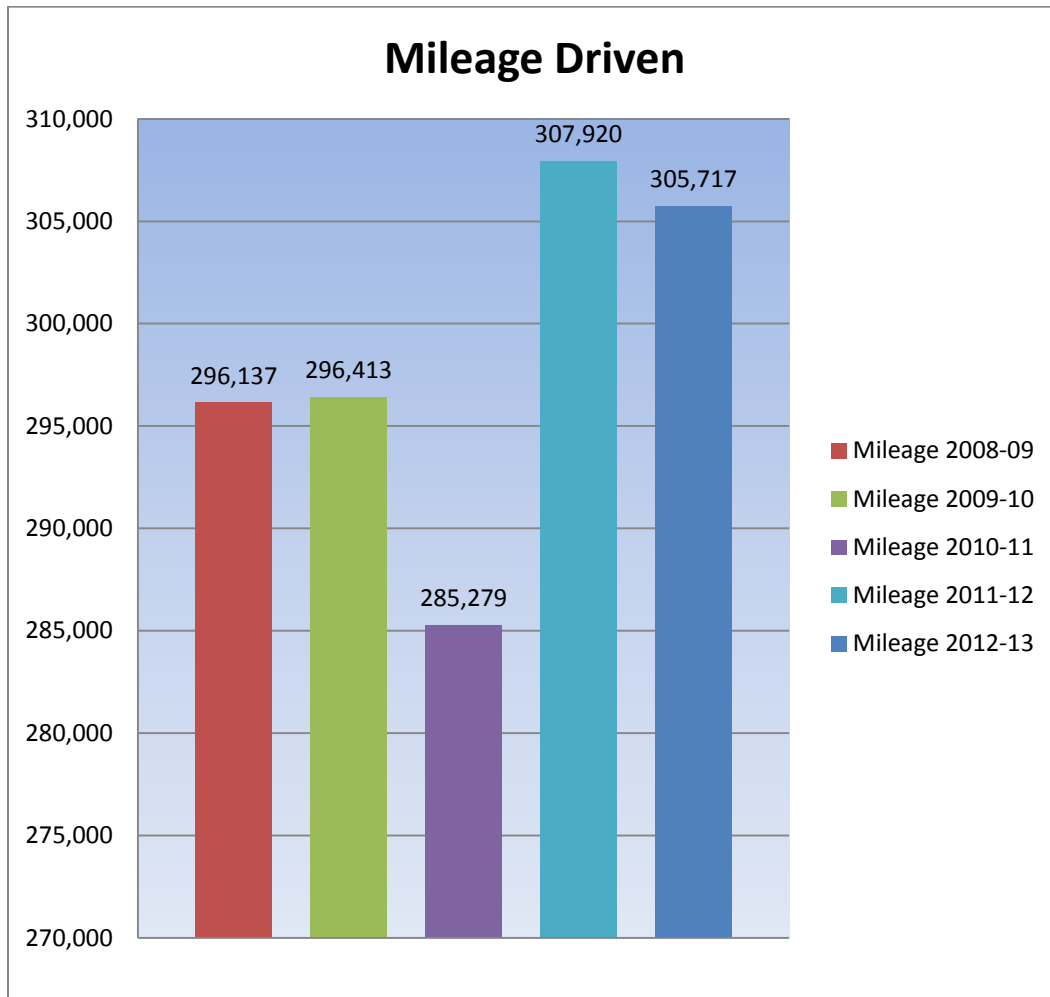
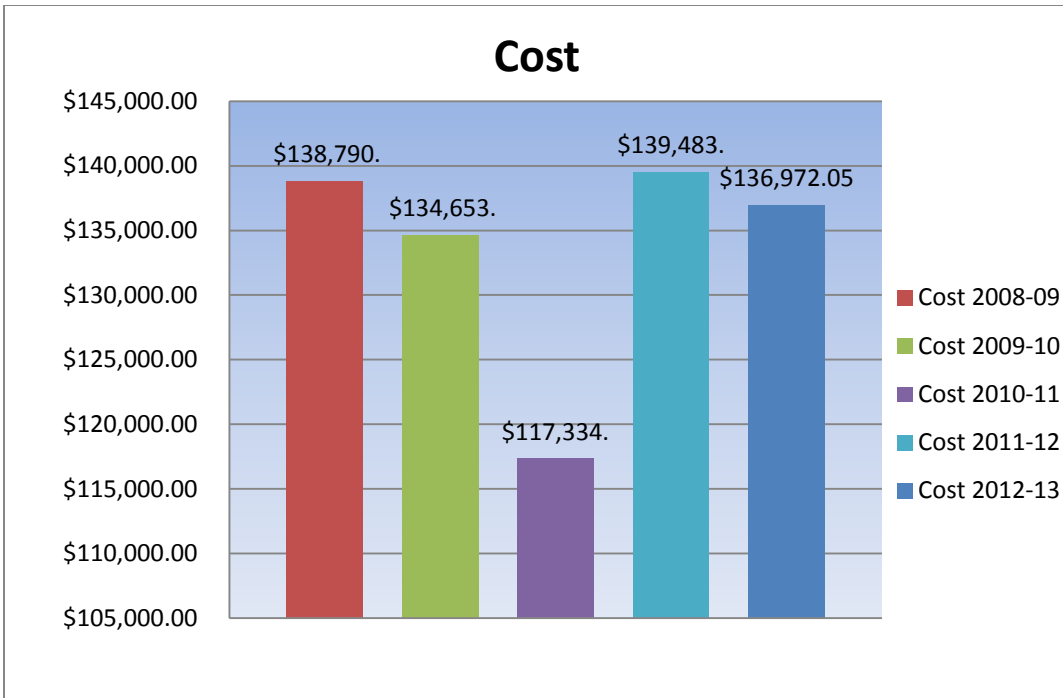
Significant Accomplishments

- Enhanced the University Vehicle Request procedures to provide for better service to the campus
- There were 702 request forms processed; an increase of 23% over 2011-2012
- A total of 305,717 miles were driven in 2012-2013; a decrease of less than 1% from 2011-2012

Statistical Data

- For 2012-2013, there were 702 vehicle request forms processed
- For 2012-2013, 305,717 miles were driven by all fleet vehicles at a total cost of \$136,972.05





Assessment Update

Assessment Statement

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

Assessment Activities

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

Assessment Goals

- Provide efficient, safe vehicles for faculty/staff use

Garage Services

Annual Report

The Garage Services unit, under the direction of the Director of University Services, is responsible for maintaining the campus fleet of vehicles and motorized equipment. The unit has one Maintenance Supervisor and two Automotive/General Mechanics. The staff provides mechanical support to over 100 licensed vehicles and 140 unlicensed pieces of motorized equipment including lawn mowers, tractors, backhoes, man-lifts and the Zamboni. This unit is responsible for all repairs, maintenance, painting and annual inspections. The staff is N.Y.S. certified to perform annual vehicle inspections. In addition to maintaining the campus fleet, the staff repairs damaged snow blowers and floor cleaning equipment. They repair the campus emergency generators located in many of the buildings on campus and respond to fleet vehicle accidents and equipment malfunctions. The Garage Services unit maintains the gasoline fueling system which provides fuel, using a special key identification system, to all campus vehicles and equipment including the Faculty Student Association (FSA) vehicles. In addition, the unit cleans, fuels and prepares all fleet vehicle and athletic vehicle requests used by campus personnel.



From left to right: John Schmidt, Justin Jacques, and Paul Siebert

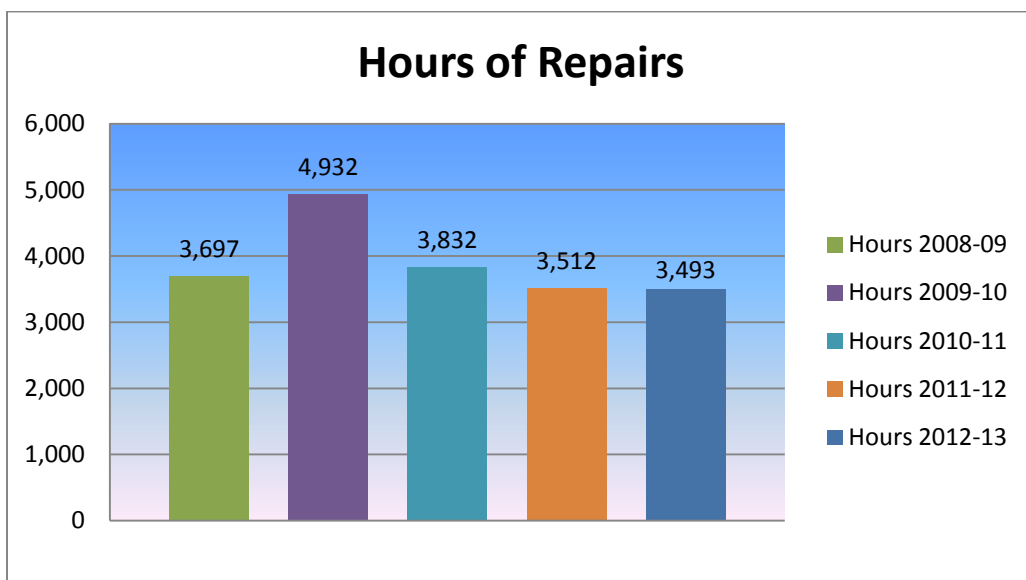
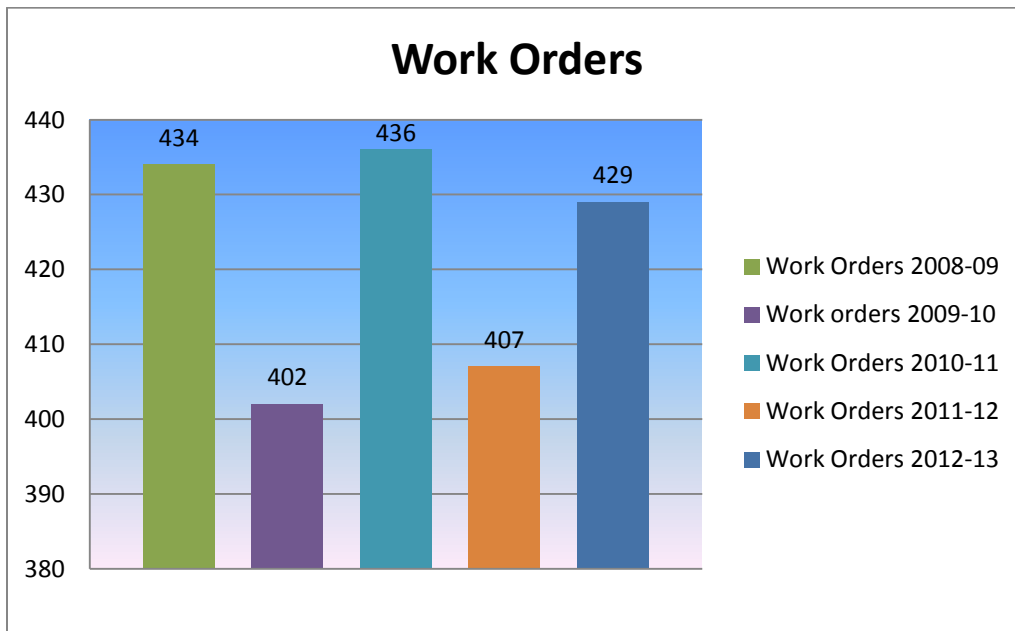
The department is staffed with one Supervisor, one Grade 12 and one Grade 9 mechanic.

Significant Accomplishments

- Continued to replace various fleet and campus service vehicles as needed
- Continuing training of staff on new vehicle repair procedures
- Enhanced the University Vehicle Request procedures to provide for better service to the campus
- Prepared, cleaned and fueled fleet vehicles for 702 fleet vehicle requests
- Responded to various maintenance equipment malfunctions and on-campus building repairs

Statistical Data

Fiscal Year	Work Orders Completed	Work Order Hours
2006-2007	479	2,996
2007-2008	406	3,479
2008-2009	434	3,697
2009-2010	402	4,932
2010-2011	436	3,832
2011-2012	407	3,512
2012-2013	429	3,493



Assessment Update

Assessment Statement

The Garage Services unit provides consistent quality customer service to ensure all vehicles and equipment are safe and ready for use while evaluating the equipment and supplies for quality and reliable performance.

Assessment Activities

- It is standard procedure to observe, review, inspect and monitor staff work while in progress, and when completed, to ensure the proper use of materials, equipment and workmanship. Ensure that schedules are met, and that the work is performed accordingly
- Training, instruction and assistance are provided to ensure assignments are completed accurately and efficiently
- A total of 429 work orders were completed, consisting of 3,493 labor hours

Assessment Goals

- Continuing training on new equipment for servicing and repairs
- Keep up to date on new vehicle repair procedures

Mail Services

Annual Report

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

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

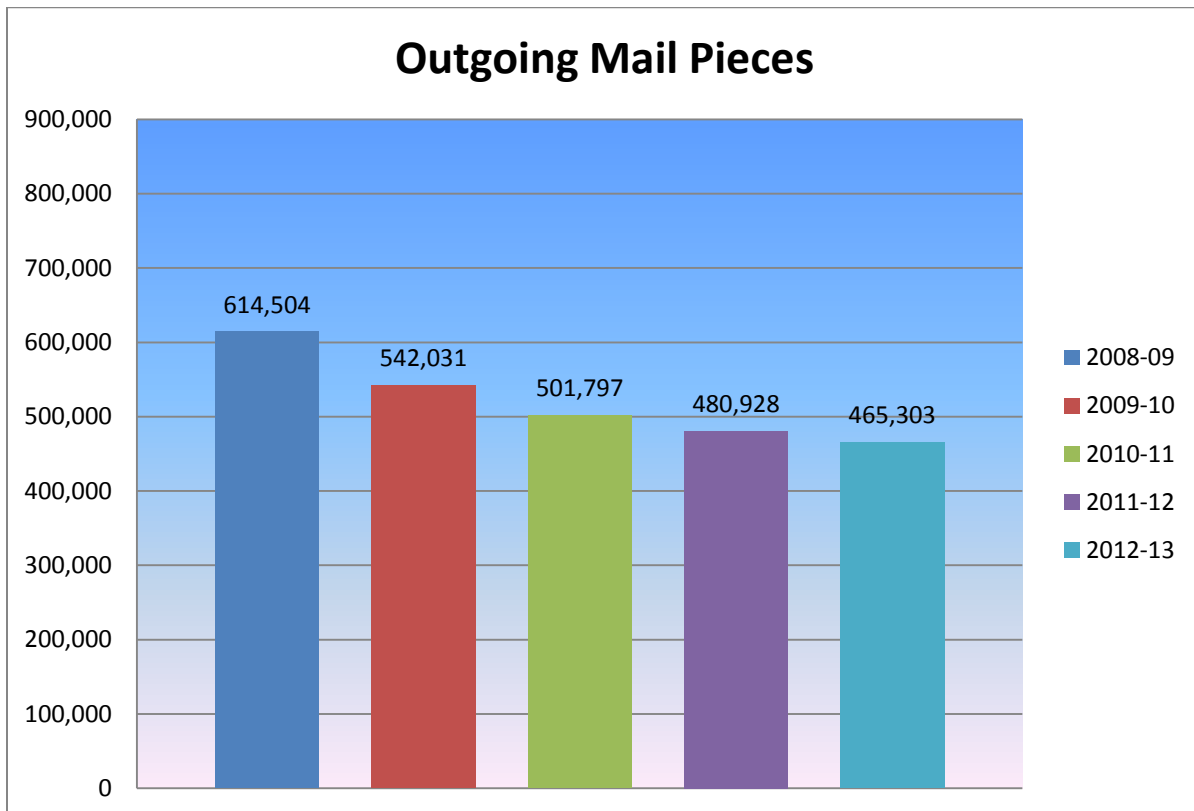


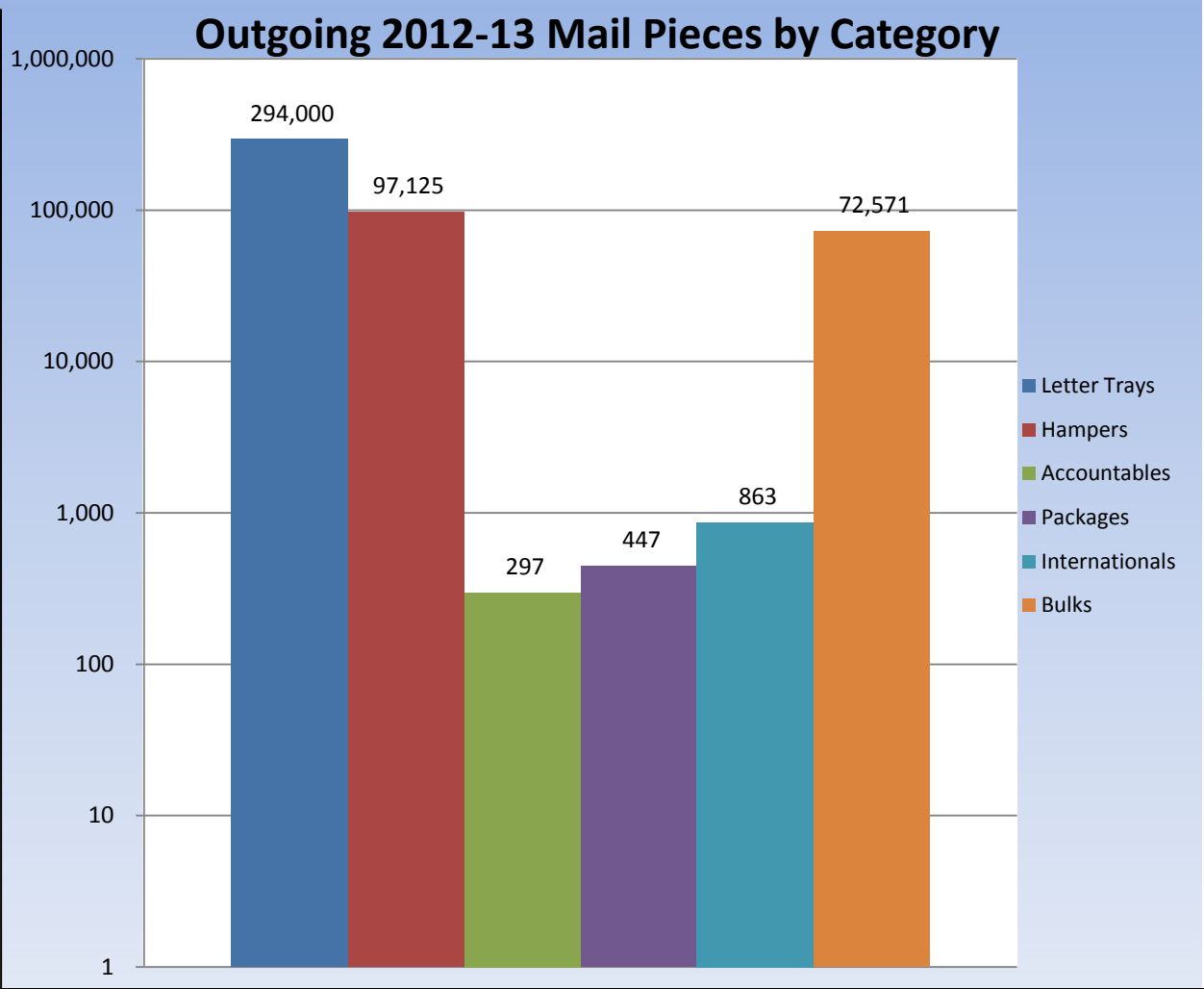
Janet Parsons

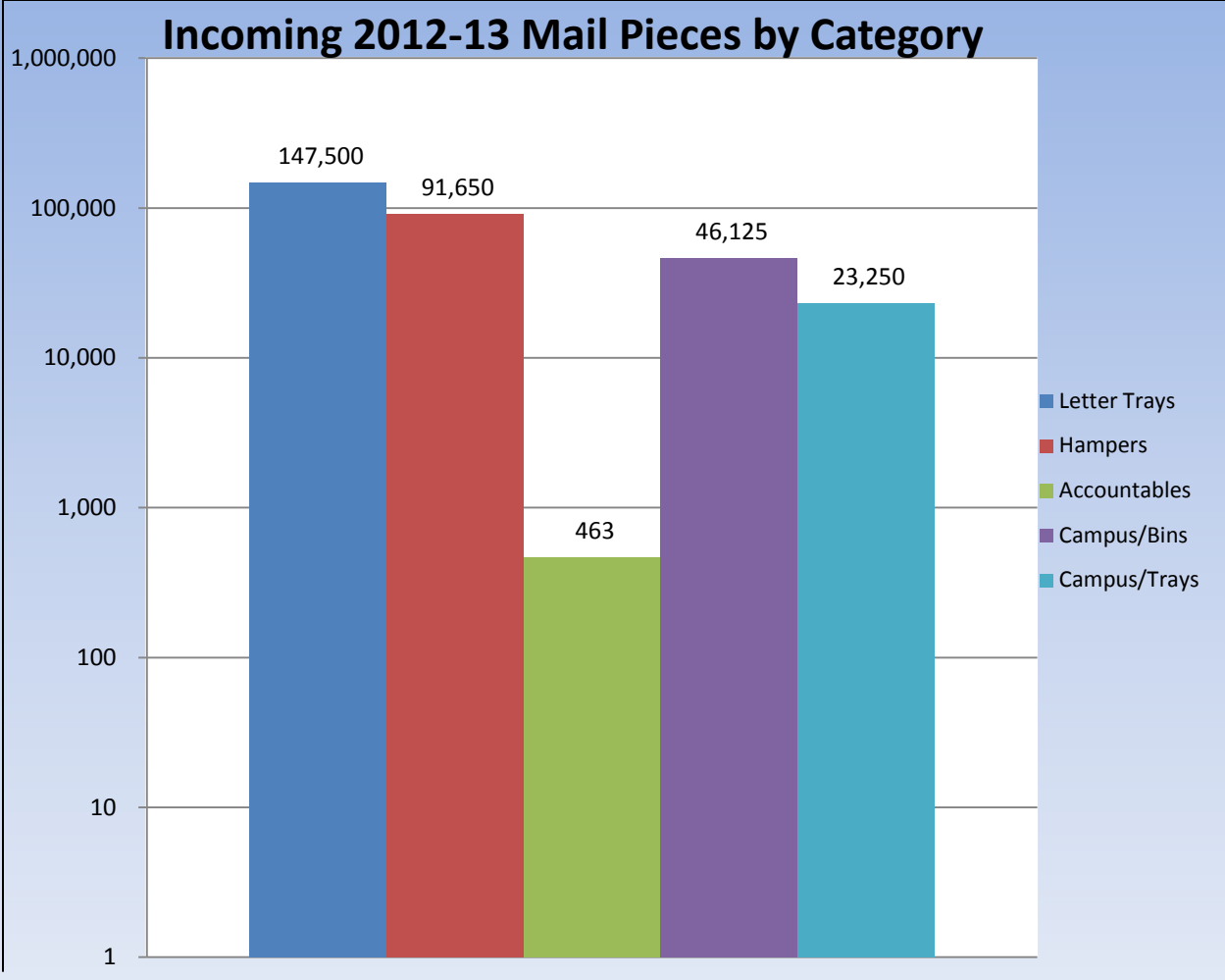
Significant Accomplishments

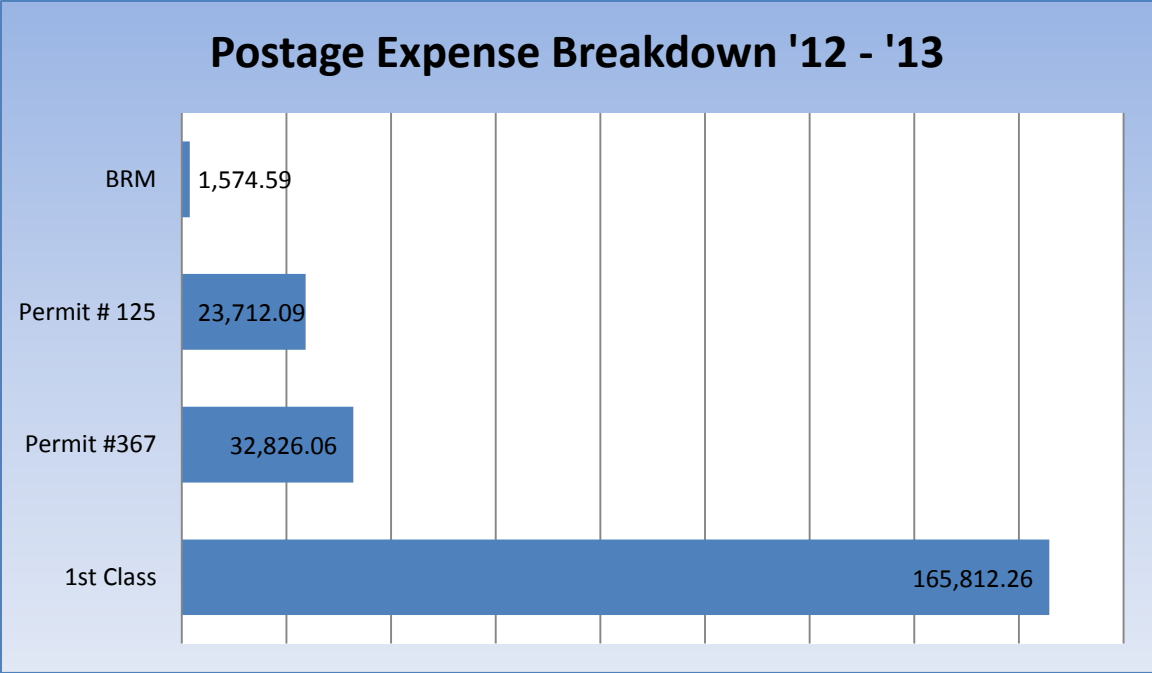
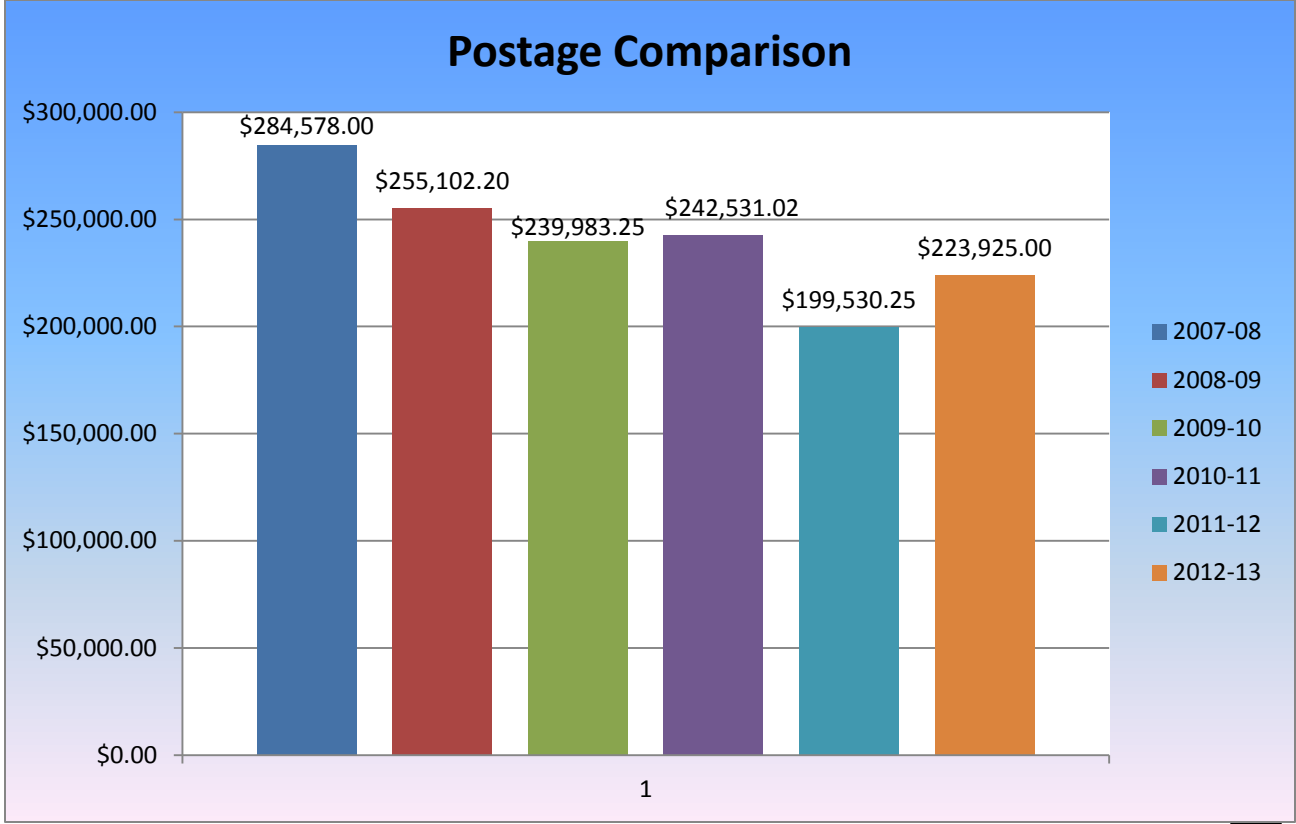
- Deliveries are made to 84 departments and 13 dormitories while eight other departments pick up their own mail
- There were eight student workers for the fall & spring 2012-13 semesters. A total of 80 student hours were scheduled per week. A reduction of 7.5 hours
- In accordance with Internal Control's Mailroom Security the annual training session was held in September 2013. The training will cover identifying anonymous mail, postal policies and procedures and an Emergency Response Drill review. A video seminar on mailroom safety produced by the NYS division of Homeland Security and Emergency Services will be shown. The training serves as a refresher for returning staff and enlightens new employees of the importance of observing potential hazards. In addition to the safety and security topics, many other mailroom rules, regulations and procedures will be discussed with an emphasis on sorting mail to the correct department. All Mail Services employees, state staff and students, are required to attend.
- Mandatory use of the Intelligent Mail Barcode for BRM/CRM and any permit mailings claiming automation pricing was implemented

- Mail rates increased effective January 27, 2013. First class postage is now \$.46 for a one ounce letter and \$.92 for a one ounce flat with each additional ounce costing \$.20. International rates and other mail class rates also increased. Commercial Base Pricing is still available to us offering substantial savings for several classes of mail.
- Postage cost increased by 12.2%









Assessment Update

Assessment Statement

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

Assessment Activities

- Overall Postage Expense (2012 – 2013) \$223,925.00
Postage Expense – Increase or (Decrease) (%)
 \$ 223,925.00 FY 12 - 13
 \$ 199,530.25 FY 11 - 12
 \$ 24,394.75

$$\frac{223,925.00}{199,530.25} =$$

 X
$$\frac{0.12226}{100} =$$

 12.23 = 12.23%
- Estimated Incoming pieces
 147,500 trays
 91,650 hampers
 463 accountables
 855 packages
 46,125 campus bins
 23,250 campus trays
 309,843 total incoming pieces
- Total outgoing pieces
 294,000 trays
 97,125 hampers
 297 accountables
 447 packages
 863 international
 72,571 bulks
 465,303 total outgoing pieces
- Total incoming and outgoing pieces
 309,843
 465,303
 775,146

- Pieces/day

$$\begin{array}{r}
 69,375 \text{ (campus)} \\
 705,771 \text{ (federal)} \\
 \hline
 775,146
 \end{array}$$

$$\text{Days } \frac{775,146}{249} = 3,113 \text{ pieces/day handled}$$

Statistical Averages

Overall the mailroom processed approximately 465,303 pieces of outgoing mail. This is a combination of approximately 392,732 pieces of first class mail and 72,571 pieces of standard bulk mail. The staff also received, sorted and delivered approximately 240,468 pieces of incoming federal mail and 69,375 pieces of intra-campus mail. In total, the mailroom staff handled about 775,146 pieces of mail this year. On average about 3,113 pieces of mail are handled daily.

Assessment Goals

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

Park and Ride

Annual Report

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



From left to right in front: Phil Kumler, Jim Oddo and Gil Uhlendorf; in back: Tom Taylor, Jim Schwerk and Tim McGraw

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

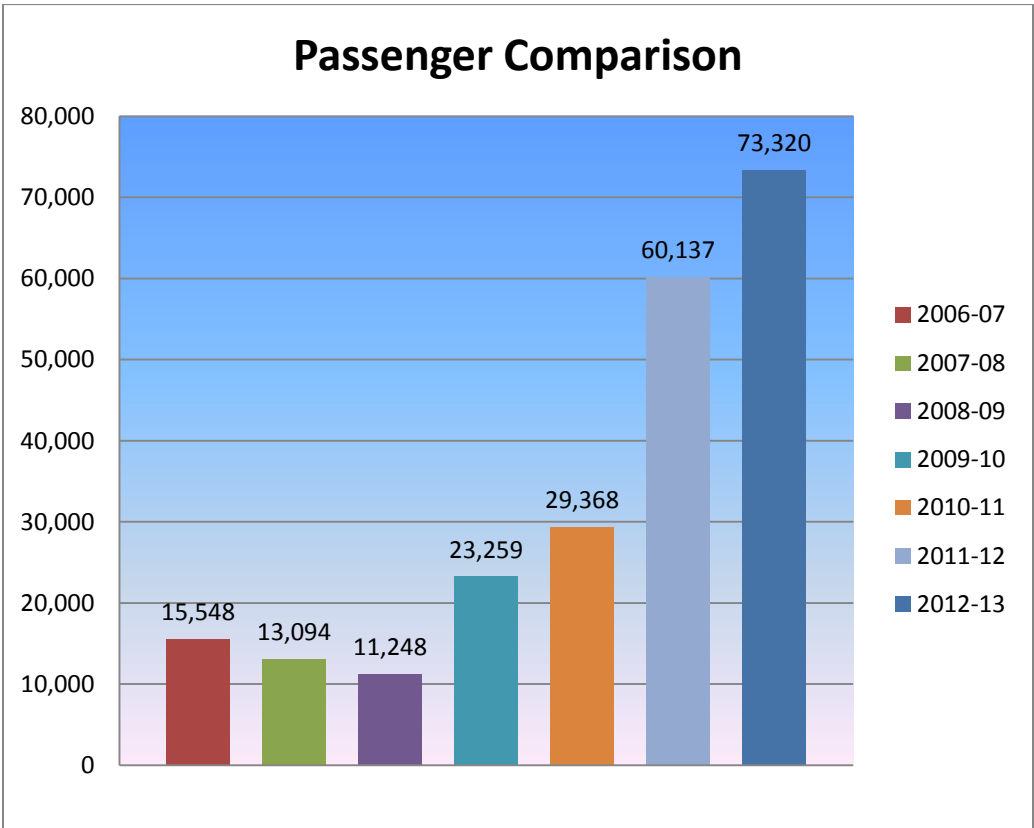
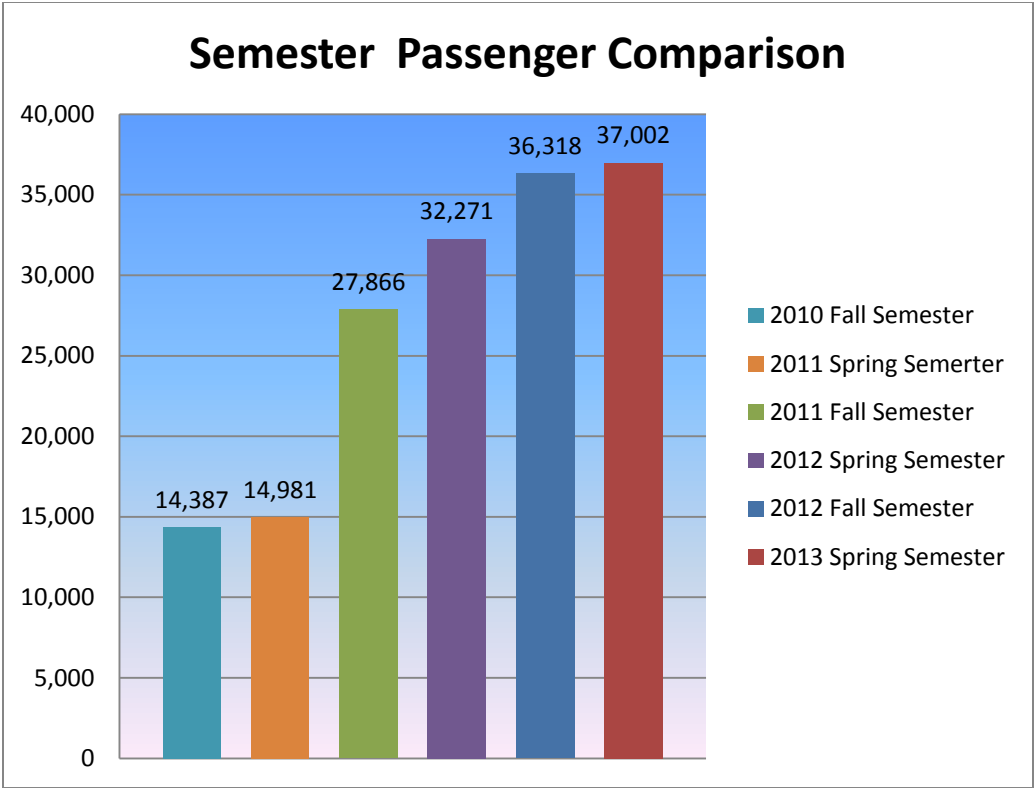
Park and Ride had an increase in ridership this past year with 73,320 passengers. This is a new record over the previous record of 60,137 passengers in 2011-2012.

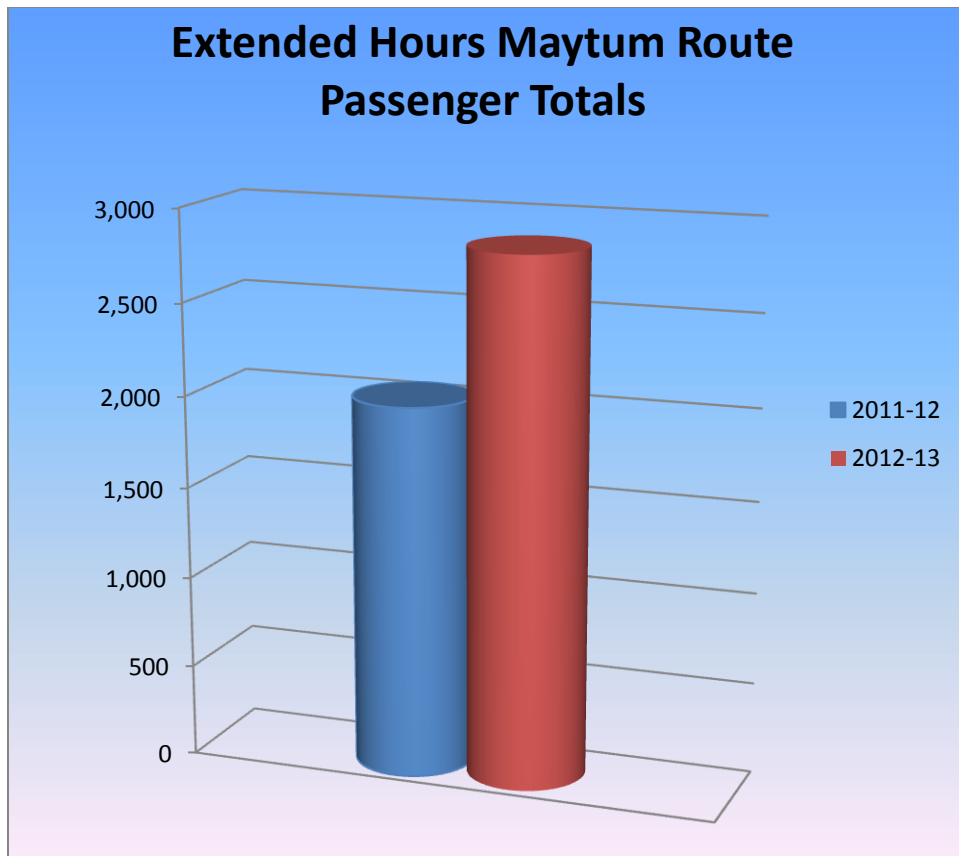
Significant Accomplishments

This was the eighth year that the shuttle service was offered. The shuttle service has seen an increase in ridership this past year. We still receive many compliments from students and staff thanking us for this service. The added extended hours on the Maytum Hall route to aid evening classes continues to grow in ridership.

Statistical Data

- There were 36,318 passengers serviced for the fall 2012 semester; an 30.3% increase
- There were 37,002 passengers serviced for the spring 2013 semester, an increase of 14.7%
- A total of 73,320 passengers used the shuttle for 2012-2013; this represents an increase of 21.9% in ridership from 2011-2012
- A total of 2,846 passengers used the shuttle on the Maytum route from 5:30 pm to 7:30 pm. This is an increase of 41.1% from the first year of offering the extended hours





Assessment Update

Assessment Statement

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

Assessment Activities

Our passenger count had increased again this year, as more students, faculty and staff are using this service.

Assessment Goals

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

Property Control

Annual Report

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

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



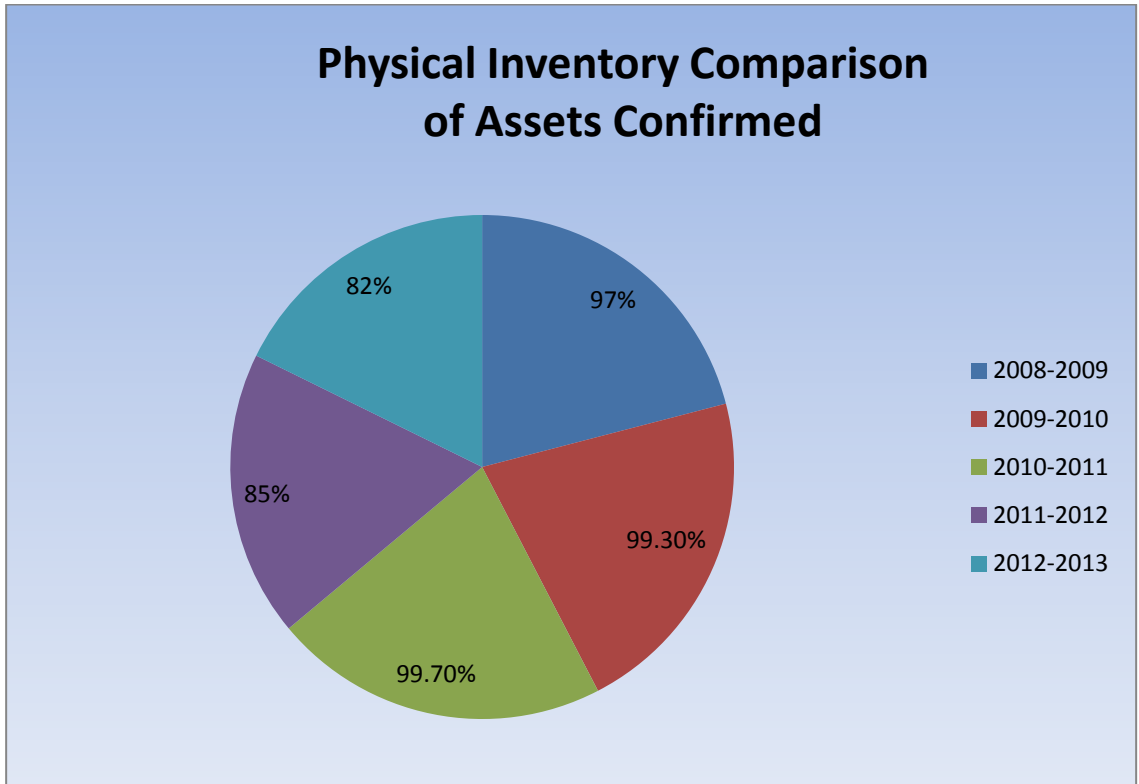
Lois Valentine

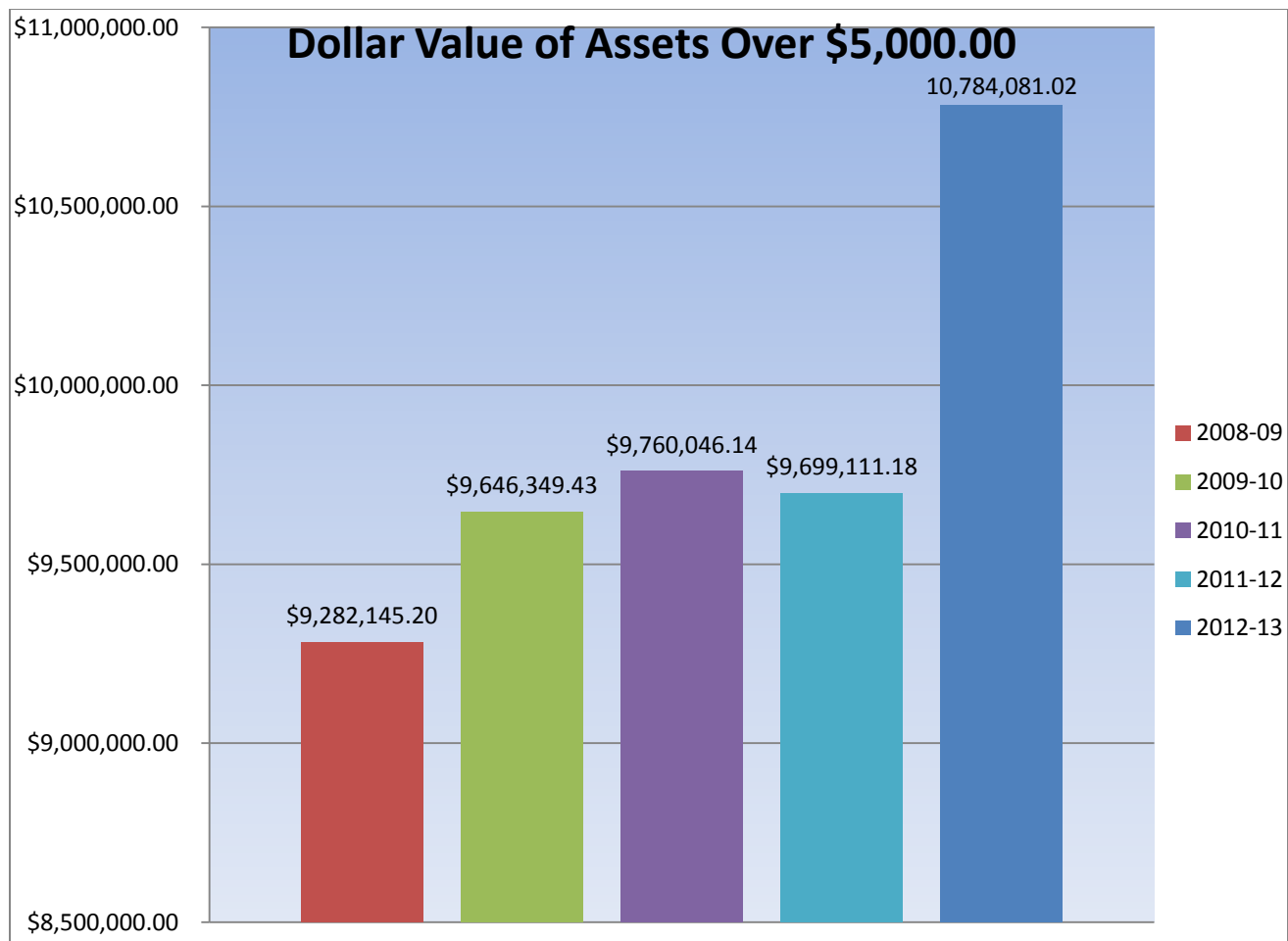
The department staff consists of a Calculations Clerk 2 and one student with good working knowledge of Microsoft Access and Excel. During the months of May through August, extra student help is recruited for the physical inventory process.

Significant Accomplishments

- The System Administration, Real Asset Management System went through several adaptations in 2012-2013
- The annual required physical inventory for 2012-2013 was completed with 82% of campus assets confirmed
- Campus electronics recycling was held in July and January at no cost to the campus. The revenue generated from the 19,359 lbs. of electronic equipment was \$2,212.22
- During 2012-2013 there were 52 new assets totaling \$1,015,087.35 added to the Property Control System
- During 2011-2012 there were 24 assets totaling \$269,854.00 retired from the Property Control System
- Property Control oversaw the Attic and Seller Days participation with some items being claimed by various departments for campus use. Proceeds for the three day event were \$2,487.80

- Surplus equipment was either transferred to other campuses or to OGS for disposal on Ebay
- Presented at the Administrative Workshop on Property Control
- Updated campus property control procedures manual





Assessment Update

Assessment Statement

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

Assessment Activities

Property Control completed its annual physical inventory resulting in finding 85% of the University's assets. The reduction in confirming the assets of the college is due to the Real Management property software implementation problems.

Assessment Goals

- Continual use of SUNY System Administration Property Control software and database
- Continual asset inventory and reconciliation
- Update web page and property control manual

Telecommunications

Annual Report

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

The department is staffed by University Services.

Significant Accomplishments

- The telephone operator answered calls for fiscal year 2012-2013 were 5,860 on the University's information line; in addition, the operator also handled calls for the University Services lines. This is an increase of 5.2% over 2011-2012
- The department also processed 52 work orders consisting of 105 items for new or changed phone service
- The department also processed 150 repair orders

Statistical Data

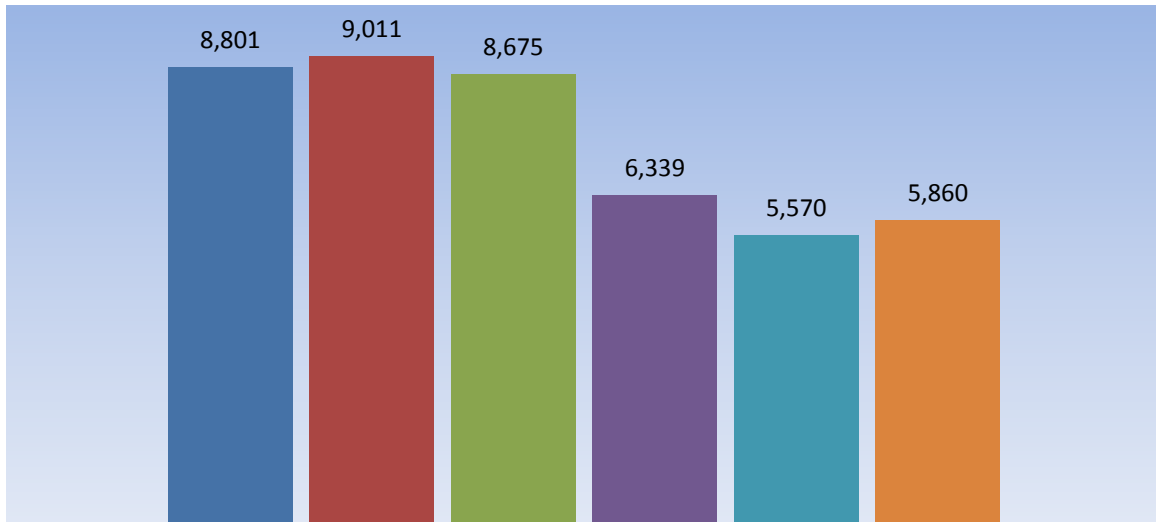
- Total telecommunications expenditures for fiscal year 2012-2013 were: \$587,576.49
- Verizon Long distance minutes for 2012-2013:

Total long distance minutes - State	200,570
Total long distance minutes - Non State	21,411
Total minutes	221,981

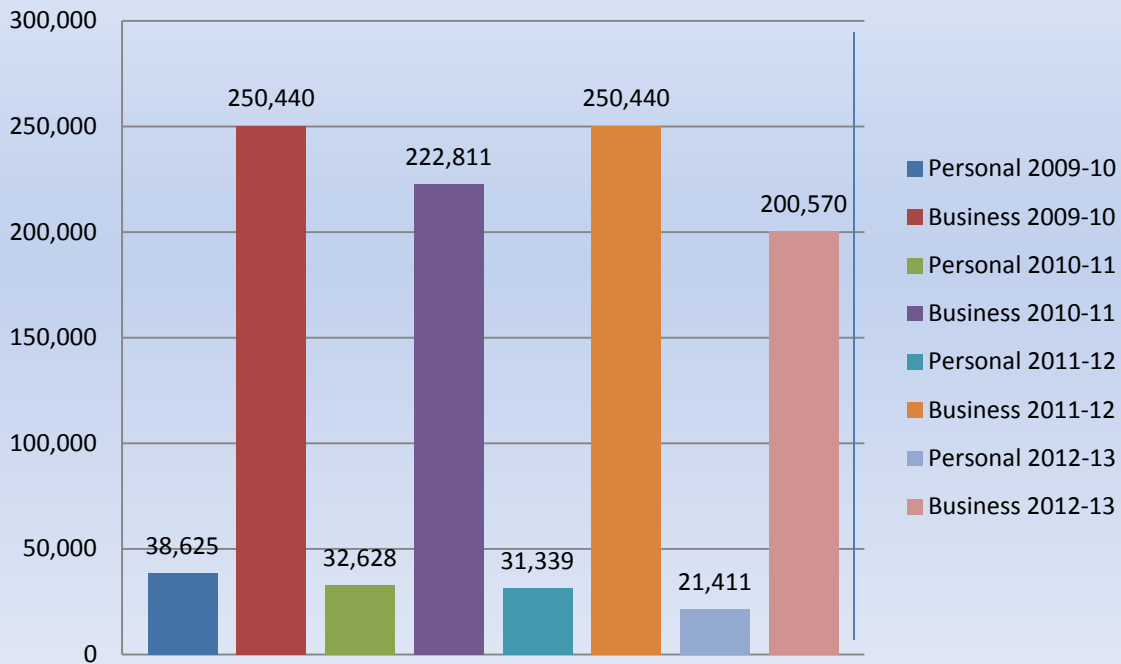
- This represents a 46.4% decrease in state long distance minutes from 2011-2012
- This represents an 1.3% decrease in non-state long distance minutes from 2011-2012
- Operator assisted calls increased 5.2% over 2011-2012

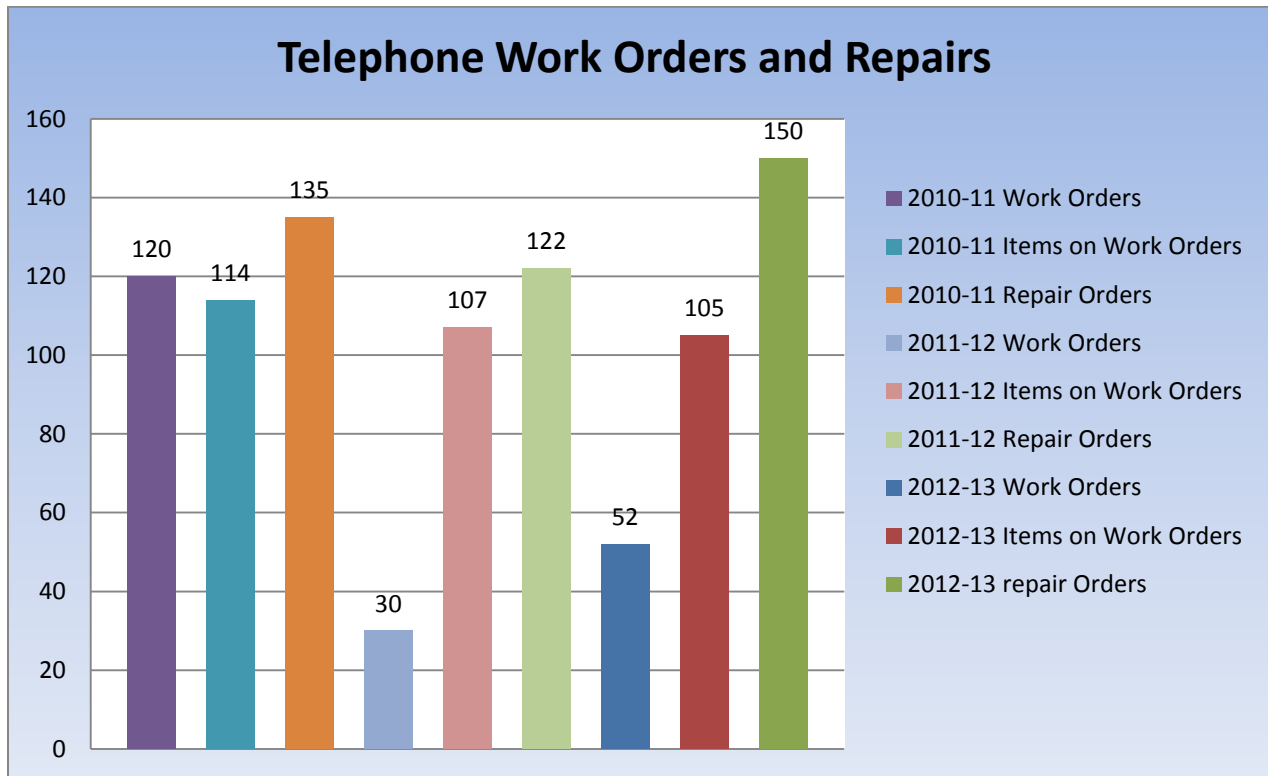
Operator Call Report

■ 2007-2008
 ■ 2008-2009
 ■ 2009-2010
 ■ 2010-2011
 ■ 2011-2012
 ■ 2012-2013



Verizon Personal - Business Long Distance Minutes





Assessment Update

Assessment Statement

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

Assessment Activities

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

Assessment Goals

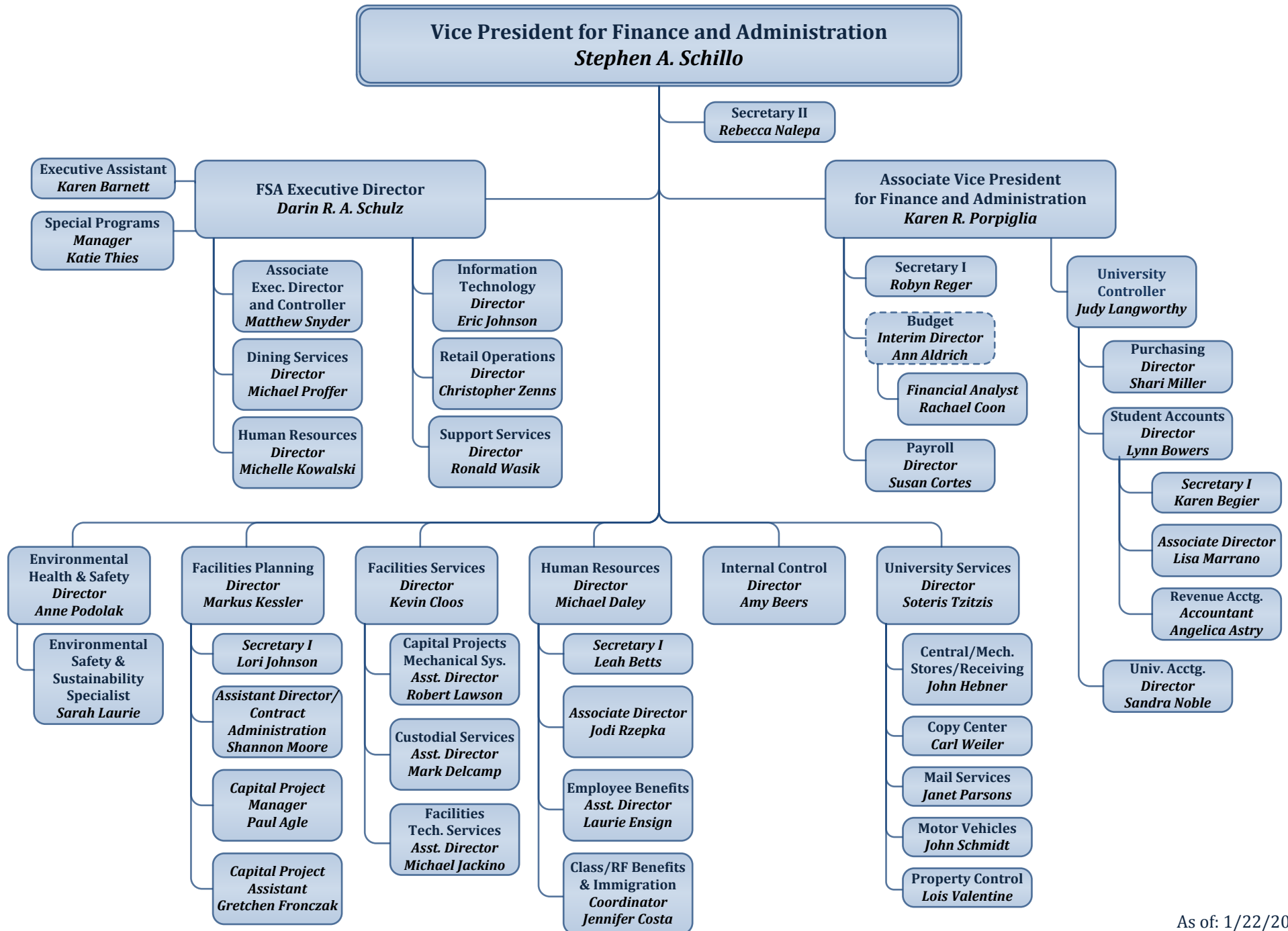
- Continue with cost savings opportunities to reduce telephone expenditures
- Review the cost to go to VOIP

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Appendix A

- **Organizational Chart**

Finance and Administration



Appendix B

- **SUNY Fredonia Vision Statement**

SUNY Fredonia Vision Statement

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

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

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

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

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

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

In a setting of well-maintained buildings and grounds, co-curricular activities and sports will continue to develop leadership and unite participants in the pursuit of shared interests. Fredonia's professional staff will continue its strong contribution to student development and learning outside of class.

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

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

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

Approved by Faculty Council 11/97

ACKNOWLEDGEMENTS

CONTRIBUTORS

Finance and Administration

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Robyn Reger, *Secretary 1*

Associate Vice President for Administration

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Sue Cortes, *Director of Payroll Services*
Shari Miller, *Director of Purchasing*
Lynn Bowers, *Director of Student Accounts*
Sandy Noble, *Director of University Accounting*

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Julie Bartlett, *Clerk 2*
Sarah Laurie, *Environmental Health & Sustainability Specialist*
Gary Brittain, *Fire Safety Coordinator*

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Lori Johnson, *Secretary 1*
Gretchen Fronczak, *Capital Project Assistant*

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Michael Jackino, *Assistant Director of Facilities Services – Technical Services*
Robert Lawson, *Assistant Director of Facilities Services – Capital Projects and Energy*
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Shannon McKoon, *Clerk 2*
Joseph Fabritius, *Electrical Supervisor*
Rich Newton, *Head Grounds Supervisor*
Ray Bogue, *Structural Trades Supervisor*
Suzanne Freitas, *Head Janitor*

Faculty Student Association

Darin R. A. Schulz, *Executive Director of FSA*
Matthew Snyder, *Associate Executive Director of FSA and Controller*
Karen Barnett, *Executive Assistant*
Michelle Kowalski, *Director of Human Resources*
Eric Johnson, *Director of Information Technology*
Michael Proffer, *Director of Dining Services*
Ronald Wasik, *Director of Support Services*
Katie Thies, *Special Programs Manager*
Christopher Zenns, *Director of Retail Operations*

Human Resources

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

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Public Relations

Roger Coda, *Campus Photographer*

Publication Services

Patty Herkey, *Communications Designer*

University Services

Soteris Tzitzis, *Director of University Services*
John Hebner, *Principle Stores Clerk*
Tracy Stokes, *Keyboard Specialist 1*
Janet Parsons, *Senior Mail and Supply Clerk*
John Schmidt, *Motor Equipment Supervisor*
Lois Valentine, *Calculations Clerk 2*
Carl Weiler, *Clerk 1*

ADMINISTRATIVE AWARD WINNERS

2013

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

2012

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

2010

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

2008

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

2006

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

2004

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

2011

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

2009

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

2007

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

2005

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

2003

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