

Overview

Together with colleagues from across the university, Finance and Administration employees tackled seemingly insurmountable obstacles over the past year due to the impact of the global pandemic, to ensure NC State remained open, operational, and a safe place to live, study, teach, research and work. Thank you to our 1600+ Finance and Administration employees who demonstrated an unwavering commitment to the university with determination, perseverance, innovation and collaboration.

Over the same challenging and difficult year, the Office of Finance and Administration (OFA) progressed numerous initiatives and collaborated with university partners to further all five of the university's strategic goals such as:

- Completing the stunning new Academic Success Center in support of **student success**,
- Completing the new and cutting-edge Fitts-Woolard Hall in support of pioneering **research**,
- Growing our ~ \$1.78B endowment, providing substantial funds for **strategic initiatives and scholarship**,
- Carefully **stewarding** our \$1.6B operating budget, 1200 buildings and 100,000 acres of land across the state,
- Ensuring **organizational excellence** by leading mission continuity efforts throughout the pandemic,
- Creating a **culture of constant improvement** via HR's transformative three-year strategic plan (completed),
- Ensuring more than 10,000 faculty, staff and student-workers are **engaged and valued** in the workplace,
- **Engaging** with City of Raleigh and private partners in the best, long-term interest of NC State University.

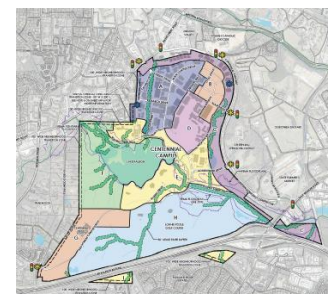
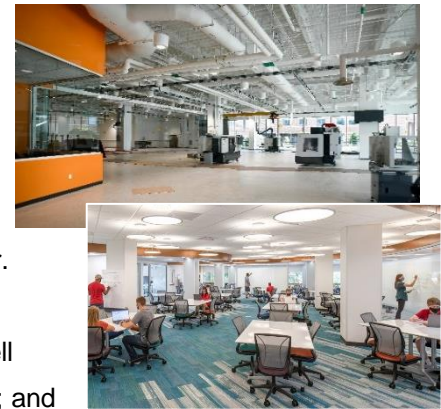
Finance and Administration teams weathered a challenging year, and accomplished much despite complicated and changing work conditions. We are proud of our accomplishments and our workforce. Please review the following annual report for more information about Finance and Administration's FY20-21 accomplishments and initiatives:

- FY20-21 Accomplishments – Highlights
- COVID-19 Impact Statement
- Diversity and Inclusion Initiatives
- Special Programs and Initiatives
- Staff Updates and Recognitions
- Appendix: FY20-21 Accomplishments, Categorized by Principles of Work

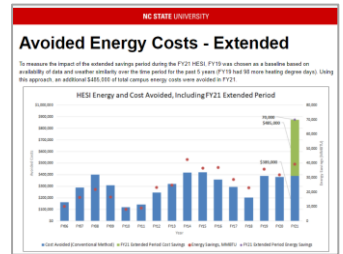


FY20-21 Accomplishments - Highlights

- [Fitts-Woolard Hall](#) completed, a \$137M, 225K GSF state-of-the-art building transforming instruction and research within the College of Engineering.
- Stunning, student-centric \$45M renovations to the [Wellness and Rec Center](#) and Carmichael Gym completed in support of student engagement and well-being.
- Transformative \$15M modifications to the [Academic Success Center](#) at D.H.Hill Jr. Library completed, to enrich the student experience and support student success.
- [Memorial Belltower](#) at Henry Square \$6.5M renovations and installation of a 55 bell carillon completed, completely reimagining this space as a grand entry to campus; and successful proof-of-concept for the first-ever Design-Build approach for NC State construction projects.
- Prudently managed ~\$1.78B [endowment](#), ensuring support of strategic initiatives and long-term financial stability.
- Created a new CFO dashboard to support highest-best use funding decisions, including federal COVID relief.
- Established a new [University Budget Advisory Committee](#) with cross-disciplinary membership including faculty and student leaders, and provided frequent “Budget Updates” to university groups including ALM, University Council, Faculty Senate and Staff Senate, to improve budget transparency, increase communications and build rapport with key university constituents regarding the university’s \$1.6B operating budget.
- Implemented a new [paperless purchase order system](#) to streamline and quicken ordering and reduce fraud.
- Created new daily and monthly [parking permits](#), conveniently available online, to support hybrid work schedules.
- Implemented a new [Employee Emergency Loan Program](#) to assist eligible employees facing short-term crises.
- Developed a new [Finance Knowledge Base](#), an online self-service library with 700+ finance tutorials and related articles, available to university employees 24/7; with plans to expand to HR and budget areas.
- Issued 100+ major employee communications (30+ memos to all employees and 70+ memos to targeted groups).
- UHR successfully completed its three year “HR Transformations” strategic plan and first [annual report](#).
- The University Police Department improved community engagement, communication and transparency via
 - an upgraded [University Police Department website](#) and social media platforms, with more statistics,
 - broadened diversity training,
 - increased participation at student forums,
 - a new platform for the university community to participate in the police officer hiring process; and
 - University Police Chief, Daniel L. House, Jr. service on NC State’s Racial Equity Summit Steering Team.
- Successfully completed negotiations with NCDOT to mitigate I-440 impacts to NC State land, thanks to partnerships with OGC and EAPED.
- Successfully completed a [rezoning](#) application with the City of Raleigh, to modernize the framework for Centennial Campus and advance the university’s three-tiered teaching, research and statewide outreach mission (see right image).
- Restructured Campus Enterprises auxiliaries to improve operational efficiencies and service: re-organized Rave! Catering, outsourced Alumni House Catering and Athletic Concessions, and repurposed One Earth at Talley as a student residential dining facility.
- Lonnie Pool Golf Course remained open throughout the past year, enjoying its best year of business since opening with 45,000 rounds played – the most in the course’s history.



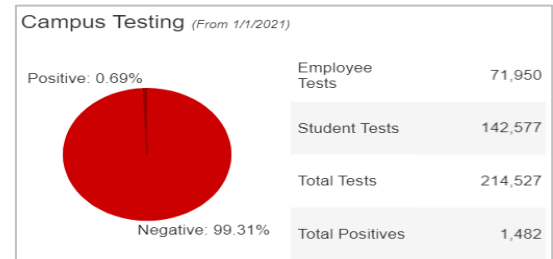
- Installed a \$9M, 3 million gallon [chilled water storage tank](#), funded via the Plant Sciences Initiative, to cut energy costs on Centennial Campus by producing chilled water overnight when electricity rates are lowest.
- Recognized a record-breaking \$874K in avoided energy costs over the extended winter break, thanks to the [Holiday Energy Saving Initiative](#), an energy conservation program to lower building temperatures and utility costs in unoccupied campus buildings over winter break (see right graph).
- Throughout the pandemic, led efforts to ensure NC State remained open and operational:
 - EMMC led mission continuity efforts across all aspects of the university.
 - Environmental Health & Safety supported [COVID-19 Research Continuity/Research Restart](#) (all phases).
 - Facilities improved [indoor air quality](#) systems across 400+ buildings, modified classrooms and office spaces, and trained housekeeping staff on COVID-19 protocols to ensure safe occupancy.
 - Campus Enterprises immediately developed COVID-19 safe protocol for employees and patrons; quickly trained staff and retooled [dining establishments](#) with zero gaps in student residential dining services.
 - Rave! Catering served meals to on-campus quarantined and isolated students, delivering 300+ meals per day during peak periods.
 - Received and re-delivered 20,000+ packages (UPS, FedEx, Staples) on behalf of off-campus workers.
 - With Student Health Services, facilitated 11,000 on-campus surveillance tests per week and established a new inhouse testing facility at CVM – game changers in lowering campus transmission rates(spring 2021)
 - With Student Health Services, established an on-campus vaccination site at Talley Student Union to mitigate transmission risk, administered 9,200+ doses and fully vaccinated 6,300+ people as of June 1.
 - Communicated new, complex, and fast changing COVID-related HR policies, programs and expectations to 10,000+ employees and supervisors; developed a new [HR Pandemic resources website](#) (78K+ visits).
 - With UCOMM, drafted 50+ university communications and hundreds of FAQs, supported two new websites [Protect the Pack](#) and [Working@NC State during COVID-19](#), maintained [COVID data dashboard](#).
 - Informed 25+ private tenants and private building owners on Centennial Campus regarding university COVID operations and expectations.
- Supported the development of the university’s new strategic plan, [Wolfpack 2030: Powering the Extraordinary](#);
 - Vice Chancellor Charles Maimone served on the Executive Steering Committee,
 - AVCs served on task forces including Pursuing Operational Excellence (co-chaired by AVC for University Human Resources, Marie Williams) and Leveraging Partnerships to Advance Engagement.
- Activated four university [Post COVID-19 Innovation Task Forces](#) to build on ‘lessons learned’ during the pandemic and explore transformational initiatives in support of NC State’s new strategic plan (released 2021).
 - [Instruction and Student Support](#) - Leveraging technology to expand academic offerings, opportunities and experiences.
 - [Research](#) - Supporting laboratory and other research operations including physical space, funding and employee well-being.
 - [How We Work](#) - Flexible work arrangements and optimization of university space.
 - [Digital Transformation](#) - Where feasible and advantageous to the university, digitize processes.



COVID-19 Impact Statement

EMMC, led by Dr. Amy Orders, along with OFA divisions and university colleagues including Dr. Julie Casani, NC State’s Director and Medical Director of Student Health Services, UCOMM, OGC, DASA, the Provost’s Office, ORI and OIT, led fundamental change in university operations, supported crisis management and mission continuity, implemented numerous new and fast changing policies and supported all aspects of COVID-19 impacted operations, campus reactivation and subsequent communications.

Thanks to collaboration across many departments, the success of the 2021 spring semester was signified by 1) less than 2% transmission rate on campus (see right chart), 2) in-person, on-campus commencement events (see right image) and 3) *EMMC earning one of the highest recognitions within the emergency management sector, winning the 2021 Innovation Award for Resource Enhancement from the Campus Safety, Health, and Environmental Management Association (CSHEMA).*



Highlights below represent just a portion of our university’s enormous effort to ensure a safe campus environment to live, study, teach, research and work – capturing the magnitude and breadth of the effort, and the required coordination to successfully sustain NC State operations and mission continuity during a pandemic. Many of these efforts are sustainable effectiveness strategies which will be continued and leveraged as vastly as feasible.

- Convened executive debrief and decision-making meetings, and established communications networks.
- Established safe workplace protocol, community standards and exception processes to ensure mission continuity and safe onsite operations.
- Ensured buildings and work environments were as safe as possible.
- Implemented on-campus surveillance testing program and vaccination program to mitigate transmission.
- Provided direct care for students living on campus and expanded safe gathering options across campus.
- Preserved university resources and ensured relief funds applied to highest and best use.

Convened executive debrief and decision-making meetings, and established communications networks.

- Convened two executive debrief and decision-making meetings, gathering 1-3 times per week as needed with the Chancellor, Provost, General Counsel and other Cabinet leaders – and EMMC and the Medical Director.
- Established several large-group operations meetings, gathering 1-3 times per week as needed: EMMC Ops Group with 50+ departmental leaders and directors from across the university, and Executive Briefing Committee which included Faculty Senate Chair, Staff Senate Chair, Student Body President and GSA President.
- Partnered with UCOMM, OGC, OIED, Provost’s Office and ORI to generate 50+ [university updates](#) specific to COVID-19 impacted operations and mission continuity; communications distributed to 40K students, faculty, staff.
- Drafted hundreds of [FAQs](#) to accompany new policies and changing operations and disseminated via mass email, social media and the new [Protect the Pack](#) website; drafted talking points for presentations and media interviews.
- Supported NC State’s [COVID-19 dashboard](#), providing the NC State community and System Office with near-daily updated statistics re: number of positive cases, testing results and quarantine/isolation housing occupancy rates.

- Facilities leadership held 100+ Town Halls (many in person) to effectively communicate key messages to its 850+ employees to unify staff on key strategies, build trust and rapport, and quickly and compassionately address concerns from many OFA employees who were required to work on campus or substantially adjust workplace protocol; likewise, divisional Associate Vice Chancellors met frequently with leadership teams and employees.

Established safe workplace protocol, community standards and exception processes to ensure mission continuity and safe onsite operations.

- EMMC and UHR partnered with OIED, UCOMM and OGC to implement [community standards](#) – and ensured timely updates based on frequently changing Executive Orders and CDC guidance. Incorporated community standards into student and employee login portals to ensure review and attestation.
- Developed required [COVID-19 workplace safety training](#) for all NC State employees for fall 2020 semester and updated required training for spring 2021 semester; and monitored completion.
- Environmental Health and Safety worked closely with the Office of Research and Innovation to implement all phases of [Research Continuity/Research Restart](#) (phases I, II, III (a-c) and IV) including establishing COVID-19 lab safety and operations protocol, training for researchers and research project density maps.
- Continued to modify the new [travel exception process](#) based on changing Executive Orders and CDC guidance; reviewed 3,000+ travel exception requests over the past year. Likewise, continued to modify the new [group gathering exception process](#) and reviewed 300+ group gathering exception requests within the past year. Approved over 100 summer programs (includes summer research programs approved/managed by ORI).
- Developed policies to manage [on-campus youth programs and in-person youth camps](#), safely.
- Implemented [Pack Planning staffing and approval process](#) for spring 2021 and summer 2021, to support return to campus directives.

Ensured buildings and work environments were as safe as possible.

- Established an [indoor air quality plan](#) and [informational videos](#) to improve air quality and address concerns from building occupants.
- Methodically evaluated every building on campus (more than 400) to ensure ventilation systems provided the freshest air possible to each space; completed preventative maintenance on every component and installed the most effective filters for each system to prepare for the academic semesters (see upper right image).
- Worked with UCOMM to generate dozens of [campus operations updates and videos](#), specific to [classroom and building, dining and retail, student centers and bus changes](#)
- Removed chairs and tables in student unions to establish [safely distanced seating](#).
- Installed large event tents across campus, built 100+ picnic tables and purchased 40+ cafe tables and 100+ chairs to expand outdoor seating for dining and classrooms.
- Installed 900+ fixed and moveable acrylic barriers in classrooms and high traffic areas.
- Installed ~200 hand sanitizing stations in primary buildings across campus.
- Distributed ~ 600,000 facemasks, gallons and gallons of hand sanitizer and nearly 1000 cases of wipes to campus units to prepare for the fall and spring semesters.



- Creatively ensured [PPE supplies available to campus during worldwide shortages](#); purchased materials as soon as available, built vendor relationships and redistributed large volume purchases into smaller packets such as turning 55-gallon drums of hand sanitizer into hundreds of personal-size bottles for faculty welcome kits in fall 2020 (see upper right image).
- Produced and installed signage to ensure consistent standards and workplace expectations across campus regarding easement through entrances, exits, hallways, stairwells, elevator and restroom occupancy, seating expectations for classrooms and conference rooms, and facemask requirements (see right image).



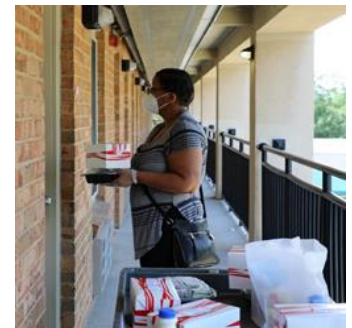
Implemented on-campus surveillance testing program and vaccination program to mitigate transmission.

- Conducted over 71,000 employee and over 142,000 student on-campus surveillance tests (Jan-June 2021) to monitor and mitigate COVID transmission.
- Contracted with third-party provider to conduct on-campus surveillance tests during the first part of spring 2021 semester; working with CVM, quickly constructed an inhouse surveillance testing facility to decrease testing turn-time and lower per testing costs.
- Administered nearly 11,000 tests per week throughout the spring 2021 semester; tests were free for NC State employees and students.
- Setup an on-campus, free vaccination site at Talley Student Union; thanks to Student Health Services, administered more than 9200 doses and fully vaccinated more than 6300 individuals (through June 1, 2021), mitigating transmission risk and ensuring a safer community for all (see right image).



Provided direct care for students living on campus and expanded safe gathering options across campus.

- Provided and delivered meals and supported housing for students residing in campus quarantine and isolation housing – delivered 300+ meals per day during peak Q/I periods (see right image).
- Repurposed outdoor space to provide students with safe and engaging places to gather and socialize: [Den at Harris Field](#), [LIVE@Centennial](#) (Spring Hill parking lot).
- Installed several large event tents with festive lighting and built picnic tables to expand outdoor seating for socializing, dining and classroom seating.
- Configured Talley Student Union as an early-voting site (Oct 2020); served as the seventh busiest early-voting site in Wake County with 21,000+ voters safely casting ballots during a two week period, without incident during the COVID-19 pandemic.
- With EMAS and others, facilitated two in-person spring commencement ceremonies at Carter- Finley Stadium with more than 5,000 people in attendance at each event, without incident; a very welcome public celebration of a successful spring semester.



Preserved university resources and ensured relief funds applied to highest and best use.

- Implemented a bi-weekly reporting process for each OUC to record lost revenue and operating expenses due to COVID-19 as necessary to qualify for federal COVID relief funds, and to fulfill System Office reporting requirements.
- Received more than \$103M in federal COVID funds (HEERF I, II, III and GEER) for the university, of which \$43M was designated for direct student assistance and \$60M was designated for university use.
- Established a new, cross-functional Federal and State Relief Funds Group, to discern the highest and best use of \$60M in federal COVID relief funds.
- Worked with corporate tenants who had to break leases due to business losses – in the best interest of the university while also serving tenants in a professional and compassionate manner.

Summary of NC State's Federal COVID19 Relief Funds				
Funding Source	Award	Event to Date Expenditures	Balance Remaining	Percent Remaining
HEERF I - Student Emergency Aid	\$ 8,947,941	\$ 8,947,941	\$ -	0%
HEERF II - Student Emergency Aid	\$ 8,947,941	\$ 8,947,941	\$ -	0%
HEERF III - Student Emergency Aid (Pending)	\$ 25,189,169	\$ -	\$ 25,189,169	100%
GEER (Oct 2020) - Student Emergency Aid	\$ 483,875	\$ 341,000	\$ 142,875	30%
Total Student Emergency Aid	\$ 43,568,926	\$ 18,236,882	\$ 25,332,044	58%
HEERF I - Institutional Funds	\$ 8,947,940	\$ 8,947,940	\$ -	0%
HEERF II - Institutional Funds	\$ 19,208,621	\$ 5,535,682	\$ 13,672,939	71%
HEERF III - Institutional Funds (Pending)	\$ 25,014,854	\$ -	\$ 25,014,854	100%
NCSU Discretionary Allocation - NC CRF	\$ 4,500,000	\$ 4,500,000	\$ 0	0%
Personal Protective Equipment - NC CRF	\$ 835,269	\$ 835,269	\$ -	0%
COVID Testing - NC CRF	\$ 473,365	\$ 473,365	\$ -	0%
Digital Learning Enhancement Initiatives	\$ 369,930	\$ 369,930	\$ -	0%
Total Institutional Aid	\$ 59,349,979	\$ 20,662,186	\$ 38,687,793	65%
Total	\$ 102,918,905	\$ 38,899,068	\$ 64,019,837	62%

As of May 31, 2021

Diversity and Inclusion Initiatives

- As mandated by Chancellor Woodson ([6/4/20 message](#)), employees completed diversity and inclusion training including Vice Chancellor for Finance and Administration, seven Associate Vice Chancellor and all senior leaders.
- Campus Enterprises, one of the most diverse employers on campus (entry-level roles), formally established new policies and processes to better identify growth opportunities for diverse staff through all ranks of the organization.
- Facilities' Team of 42 leadership group held a retreat to specifically address national events, local protests and conversations centered on Diversity, Equity and Inclusion, with the goal to address how they, as leaders, may create meaningful change throughout the division.
- University Police completed de-escalation training, diversity training and unconscious bias training, and the department is working with OIED to develop customized mandatory DEI courses for all officers.
- University Police updated the [University Police Department website](#) and social media platforms with more data and statistics on traffic warnings and citation demographics, biased based profiling data/complaints, use of force data, complaints and internal audit investigations, agency and recruitment demographic data.
- University Police building rapport and outreach with student community by participating on panels, attending Student Senate and similar university meetings, responding to [student petitions](#) and acting on [student concerns](#).
- University Police created a platform for the university community to participate in the police hiring process.
- University Police Chief, Daniel L. House, Jr. and AVC for University Human Resources, Marie Williams, served on NC State's [Racial Equity Summit Committee and Taskforce](#).
- Real Estate and Development diversity training included a targeted session on real estate/land use and racism/inequity awareness, expanding on a recent [Urban Land Institute](#) session.

Special Programs and Initiatives

Principles of Work

Continued to establish [Principles of Work](#) throughout Finance and Administration, and across the university through partnerships and routine meetings with the Assistant Deans of Finance from the Colleges, key finance/business leads from the Provost’s Office and Office for Research and Innovation, and our Business Partners group which represents a finance/budget senior lead from each of the nearly 40 two-digit OUCs.

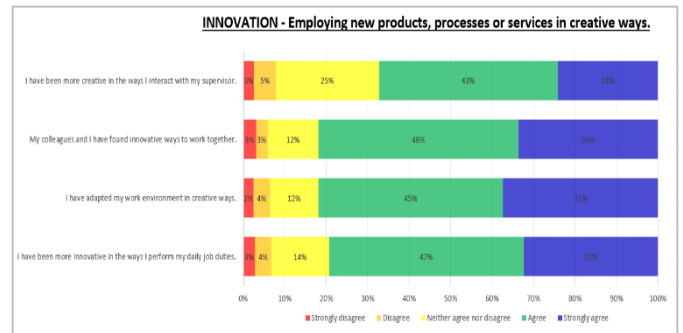
- Employee Engagement
- Customer Service
- Responsible Stewardship

University Effectiveness

To leverage many innovations, adaptations and technology that NC State’s workforce employed to solve pandemic-related administrative, financial and operating challenges, surveyed 1600+ full-time Finance and Administration employees, seeking ‘good ideas’ and ‘lessons learned’ from last year, specific to:

- Innovation
- Collaboration
- Effective Communication

From 600+ comments, identified specific business adaptations and technologies which can be expanded for greater university benefit. The Likert scale (see right image) shows one of three areas surveyed, innovation.



Post COVID-19 Innovation Task Forces

OFA survey results, along with similar efforts from colleges and units, led to the activation of four [Post COVID-19 Innovation Task Forces](#) – charged with exploring ‘lessons learned’ during the pandemic, and proposing innovative adaptations, effectiveness initiatives and technology-driven opportunities for university-wide consideration. For more information, see NC State News [Innovation Task Forces Explore Lessons Learned During the Pandemic](#).

Post COVID-19 Innovation Task Forces

Instruction and Student Support	Research	How We Work	Digital Transformation
Leveraging technology to expand academic offerings, opportunities and experiences.	Supporting laboratory and other research operations including physical space, funding and employee well-being.	Flexible work arrangements and optimization of university space.	Where feasible and advantageous to the university community, digitize processes.
Co-Chairs: - Louis Hunt* - Donna Petherbridge	Co-Chairs: - Genevieve Garland - Alyson Wilson	Co-Chairs: - Ursula Hairston* - Lisa Johnson	Co-Chairs: - Gwen Hazlehurst - Mary Peloquin-Dodd
Primary Advisor: Doneka Scott	Primary Advisor: Mladen Vouk	Primary Advisor: Charles Maimone	Primary Advisors: Marc Hoyt Charles Maimone
<small>*Charles Clift to assume role on 7/1/21 upon Louis Hunt's retirement.</small>		<small>*Ursula Hairston assumed role on 6/22/21 upon Marie Williams' departure.</small>	

Staff Updates and Recognitions

- Hired Alicia Knight, new [Associate Vice Chancellor for University Real Estate and Development](#).
- Promoted Erin Delehanty to Senior Director, Foundations Accounting and Investments.
- Promoted Ryan Bernarduci to Director, HR Information Management and Workforce Analytics.
- Hired David McNulty, new Assistant Budget Director for the University Budget Office.
- Keith Smith, Director, Board Operations and Sustainability with NC State Dining, honored by NC State's Office of Global Engagement as one of ten finalists to receive the [2021 Outstanding Global Engagement Award](#) for delivering cultural events for students in the dining halls.
- Justo Torres, Director, Contracts and Grants, selected by the National Association of College and University Business Officers (NACUBO) for its first-annual [Emerging Leaders Program](#), one of 73 high-potential finance and business leaders selected for the national, yearlong program.
- Heidi Kozlowski, Associate University Controller, University Controller's Office, selected as the university team lead for the Office of the State Treasurer' upgrade of the statewide cash management accounting system.
- Maria Brown, Director, University Cashiers Office, selected to speak at the [Coalition of Higher Education Assistance Organizations \(COHEAO\) Annual Conference](#).
- Ginger Burks Draughon, Director, Office of Cost Analysis, selected to serve as a Finance Evaluator on a SACSCOC Off-Site Review (accreditation) of three institutions.
- EMMC earned one of the highest recognitions within the emergency management sector, winning the 2021 Innovation Award for Resource Enhancement from the Campus Safety, Health, and Environmental Management Association ([CSHEMA](#)).
- NC State (Office of Sustainability) earned No. 1 in the U.S. and tied for No. 6 in the world for "Industry, Innovation and Infrastructure," No. 7 in the U.S. and No. 41 in the world for "Clean Water and Sanitation," and No. 7 in the U.S. and No. 64 in the world for "Zero Hunger." as recognized by the [Times Higher Education Impact Rankings](#).
- Six Finance and Administration employees were awarded the [2021 Finance and Administration Awards for Excellence](#); and advanced to the 2021 NC State University Awards for Excellence program, the most prestigious honor bestowed upon non-faculty employees at NC State:
 - Chris Dobek, Assistant Director for Parking Services, Transportation, for Public Service,
 - Denise Fields, C-Store Operations Manager, Campus Enterprises for Outstanding State Government Service,
 - Hazar Hamada, Technician for Student Centers Housekeeping, Campus Enterprises, for Efficiency and Innovation,
 - Andrew McClure, Maintenance Technician, Campus Enterprises, for Efficiency and Innovation,
 - Maria Muresan, I-9 Program Coordinator, University Human Resources, for Customer Service,
 - Tammy Putz, Interim Capital Accountant and Budget Officer in Capital Project Management, Facilities, for Outstanding State Government Service.
- Of the six OFA award winners noted above, three were awarded 2021 NC State University Awards for Excellence, the university's highest award for non-faculty employees, and will advance to the Governor's awards program: Denise Fields, Hazar Hamada, and Maria Muresan.

Appendix

FY20-21 Accomplishments – Categorized by the Principles of Work

Finance and Administration adopted three [Principles of Work](#) in 2019, to ensure all OFA employees are guided by the same core principles: Employee Engagement, Customer Service and Responsible Stewardship. This appendix highlights FY20-21 Accomplishments by the seven OFA divisions, categorized by the Principles of Work. FY20-21 Emerging Themes, which unify divisional goals and articulate common outcomes, noted below.

Principles of Work

FY20-21 Emerging Themes

Employee Engagement

Recruitment and Retention
Engagement and Well Being (Safety, Training, and Career Development)

Customer Service

Meet or Exceed Expectations
Continual Service Improvement
Share and Grow Expertise
Mission Continuity

Responsible Stewardship

Optimize resources to highest and best use
Steward, preserve and maintain assets
Improve operations to reduce administrative costs/burdens
Ensure compliance and mitigate risk

For more information about the seven divisions, click: [Budget and Resource Management](#), [Campus Enterprises](#), [Environmental Health and Safety](#), [Facilities](#), [Finance](#), [Human Resources](#), [University Real Estate and Development](#).

**Employee Engagement: Recruitment and Retention
Engagement and Well-Being (Safety, Training, and
Career Development)**

- University Human Resources teamed with Staff Senate, Faculty Senate and other university groups to implement:
 - [New Paid Parental Leave](#), expanding leave options for new parents,
 - [New Pandemic Leave Options](#), providing leave for COVID-19 impacted employees,
 - [New Employee Emergency Loan Program](#), providing short-term loans for eligible employees facing crises,
 - [Expanded Childcare Offerings](#), supporting the Chancellor’s vision for this employee benefit,
 - [New department onboarding videos](#) and webpages to assist colleges/units when hiring new employees.
- Developed new online procedures, virtual tools and training videos to improve the [annual SHRA and EHRA performance review processes](#) especially for non-co-located (distributed) supervisors and supervisees.
- Hosted the May 5, 2021 Employee Appreciation Day and drive-thru celebration event – thanks to Chancellor Woodson and Cabinet for distributing 2700+ lunches to university employees (right image).
- Conducted the June 11, 2021 NC State Awards for Excellence in-person ceremony, recognizing 55 outstanding non-faculty employees from across the university; 12 employees selected for the statewide Governor’s Awards for Excellence program (of whom 3 are Finance and Administration staff).
- University Police completed scenario based de-escalation training, diversity training, unconscious bias training, and the department is working with OIED to develop customized mandatory courses for all officers.
- Reclassifying Law Enforcement Officer positions to increase salaries and better align with market rates – for all 56 Law Enforcement Officers – critical for recruitment and retention, a top priority for NC State and the BOG.
- Facilities held more than 100 Town Hall sessions (many in-person) to communicate key messages about pandemic-impacted operations and expectations to the division’s 850+ employees (most worked onsite throughout the pandemic), unifying the division and building a trusted rapport by delivering consistent, uniform messages and addressing concerns in a timely, personable manner.
- Advanced Facilities’ Apprenticeship Program for skilled trades in electrical, HVAC and mechanical; and advanced Facilities’ Leadership Development program (second cohort underway).
- Housekeeping piloted a formal [discussion guide](#) to strengthen supervisor-supervisee conversations around work-related motivation and aspirations, to better engage the workforce.

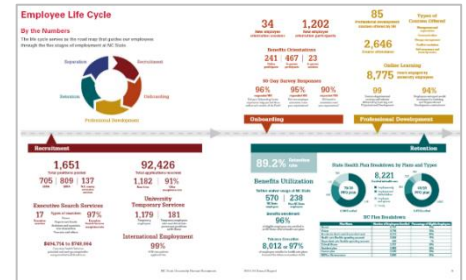


- Facilities' safety committee and dedicated safety lead continued to [collect and analyze workplace mishap data](#), identify trends and provide tools to improve workplace safety.
- When Campus Enterprises' customer-facing employees were on Paid Administrative Leave (PAL) during the early stages of the pandemic, developed training courses and certificate programs for this employee group, to increase skillset and advancement opportunities.
- Finance restructured the division's training initiative by centralizing instructional design for new training materials, to improve training effectiveness and management of training materials.
- Foundations Accounting & Investments rotated 15 student interns through its formal intern program, leading to successful employment in the investment industry thanks to 'real-world' investment experience.
- University Budget Office reorganized to improve reporting structure, leverage expertise, increase cross-training, streamline and economize processes, and to grow career paths.
- Real Estate and Development's diversity training included a targeted session on real estate/land use and racism/inequity awareness, expanding on a recent [Urban Land Institute](#) session.



Customer Service: Meet or Exceed Expectations
Continual Service Improvement
Share and Grow Expertise
Mission Continuity

- University Human Resources accomplished its three year “HR Transformation” strategic plan focused on continuous improvement and efforts to enhance HR operations across NC State; and produced UHR’s first [annual report](#), articulating strategic goals and progress towards better serving the university community.
- To improve outreach, transparency and communication, share expertise and build rapport with key university constituents, established new committees and increased meeting frequencies with cohorts:



- Formed new [University Budget Advisory Committee](#) with cross-functional representation including faculty and student leaders to improve transparency and communication regarding our \$1.6B operations budget (see right slide).
- Provided frequent “Budget Updates” to university groups including Cabinet, ALM, University Council, Deans’ Executive Meeting, Faculty Senate and Staff Senate.
- Established COVID Federal and State Relief Funds Group to discern highest-best use of \$60M federal COVID relief funds.
- Increased meeting frequency and scope for standing meetings:
 - Human Resources Advisory Council, 60+ senior HR leads,
 - OFA - ADF, college Assistant Deans of Finance small group,
 - OFA Business Partners, 35+ business/finance senior leads from each two-digit OUC.
- Met twice with Technician reporters to discuss [budget matters and COVID relief funding](#) (March 2021) and [furlough concerns](#) (Aug 2020).
- Met with WRAL reporter, Amanda Lamb, to discuss [NC State budget concerns and furloughs](#) (Sept 2020).
- With UCOMM, developed NC State News article announcing [temporary furloughs](#) (Sept 2020)
- With the Provost’s Office (Finance and Planning), conducted a Budgeting Tools Survey with budget and finance professionals across the university to identify business needs and gaps, and assess customer service levels.
- With DASA, modeled new tuition and fees billing methodology (based on per student credit hour) and determined financial impact to the university and affected students.
- Advised executive leaders (Provost, VCs for Research and Innovation, Finance and Administration, and Executive Affairs, Partnerships and Economic Development) on strategic budget matters (\$1.6B operating budget) and funding decisions (use of F&A receipts); facilitated executive level Budget Routine Meetings, F&A working groups.

2021-23 Biennial Budget Request
NC State anticipated budget based on historic allocation trends

Item	FY 2021-22			FY 2022-23		
	UNC System	NC State	NC State	UNC System	NC State	NC State
2021-23 Base Budget**	2,962,094,895	324,984,931	328,999,324	2,992,219,767	325,048,619	328,999,324
1. Enrollment Change - Consent FY 2021-22 RFR to R	20,392,231	0	3,857,479	28,382,231	3,857,479	3,857,479
2. Enrollment Change - FY 2021-22 Biennial Request	40,176,497	0	5,828,300	83,292,971	0	Not known
3. Building Renovation - Consent FY 20-23 10% m-r	15,143,829	0	4,688,000	15,143,829	4,688,000	4,688,000
4. Building Renovation - FY 2021-22 Biennial Request	30,904,132	0	1,800,000	22,480,037	4,334,400	4,334,400
5. Faculty and Staff Salaries	Equity with State Agencies	Equity with State Agencies	28,700,000	0	43,750,000	0
6. Salary Adjustment Fund*	1,400,000	0	1,400,000	0	6,700,000	0
7. Research Subventions (RFR), OIG "months lease"	1,400,000	0	1,400,000	0	1,400,000	0
8. Internal Auditors	1,400,000	0	1,400,000	0	1,400,000	0
9. RFR/ML Matching Funds	2,000,000	0	2,000,000	0	2,000,000	0
Total Personnel	310,618,479	0	18,209,279	189,915,491	11,891,819	47,866,967
Total Operating Expenses	118,755,325	0	18,852,400	176,901,130	11,891,819	78,086,967
Total Personnel Expense	94%	0%	14%	76%	76%	76%

* NC State's amount is estimated using the assumption that the university accounts for 10% of the overall UNC system base budget.
 ** NC State's Base Budget includes 2020, 2021, and 2022.
 *** Biennial Budget Center for UNC Proposed Allocation and State Private Institutions (2021, 2022).
 **** Amount estimated since NC State's amount is part of a 547M appropriation for all education systems from unappropriated fund balance.

- With Provost Office (Institutional Strategy and Analysis), launched a new CFO dashboard to model financial metrics in support of 'highest and best use' funding decisions; supported System Office efforts to establish an All-Funds dashboard and database.
- Served as primary lead for the university in responding to nearly all System Office requests, coordinated input from various units including Provost's Office, DASA, OGC, University Police, University Human Resources:
 - Workforce Analysis Survey
 - Mental Health Survey
 - Campus Security Survey
 - Campus Initiated Tuition Increase (CITI) and Student Fee
 - COVID expenses and lost revenue (input from each 2-digit OUC, to qualify for federal relief)
 - Salary increase report (increased from quarterly to monthly submissions)
 - Vacant position report (quarterly)

• Redesigned the [University Controller's Office website](#) to provide information in a more user-friendly format, and digitized user manuals to provide timely updates.

• Procurement and Business Services held its ninth annual [MarketPlace Expo](#) (first virtual expo), the most successful to date with 600+ employees and 40 suppliers attending.

• Shop MarketPlace First launched a [new dashboard](#) to provide up-to-date spending information and reporting for colleges and units (see right image).

• The Surplus Property team launched a new online auction site, selling nearly 150 large ticket items and generating \$122K+ in revenue, in addition to the \$200K generated through in-person public sales.

• During the height of the pandemic, Material Support Central Receiving received and re-delivered 20K+ packages when many buildings were without on-campus staff to receive packages from UPS, Fed Ex, Staples, etc.

• Implemented a new [paperless purchase order system](#), including invoice upload capabilities, change request features, and email-driven PO request process to streamline and quicken purchase ordering, and reduce fraud.

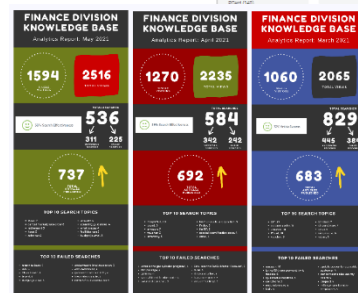
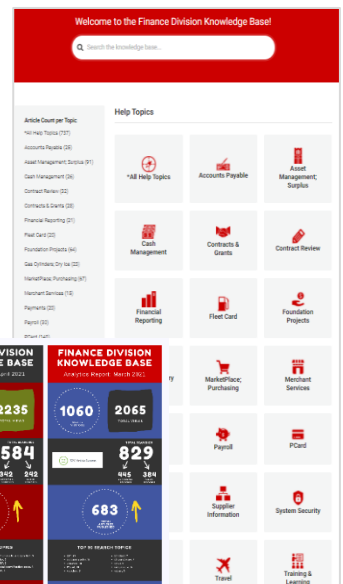
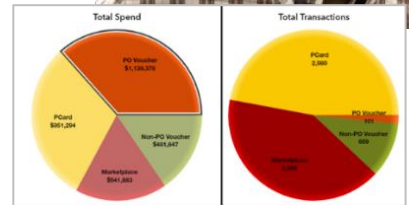
• University Cashier's Office implemented a [new payment plan](#) system for tuition management to expand student payment options and flexibility, and integrated with the Student Information System to increase transparency and reduce administrative tasks.

• Implemented payroll deduction for graduate fees, making payment easier for graduate students whose tuition is covered by the Graduate Student Support Plan.

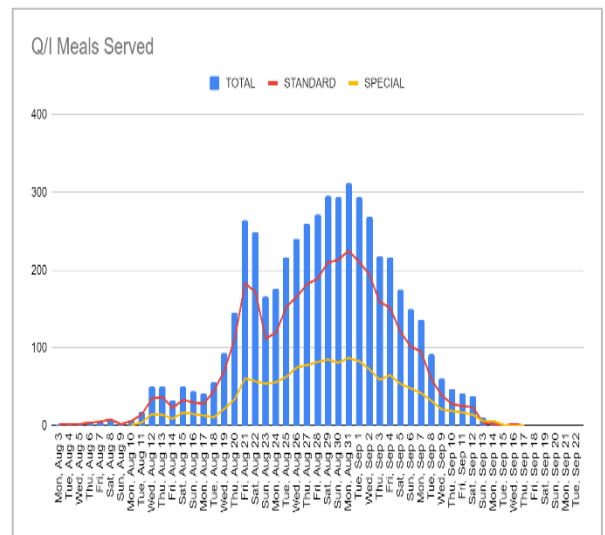
• With ORI and OIT, advanced the [Enterprise Research Administration](#) system with implementation of compliance modules, Animal Care and COI/NOI

• Developed a new [Finance Knowledge Base](#), an online self-service library with 700+ finance tutorials and related articles, available to employees 24/7; over 2500 visitors within the first year (see right images).

• Finance rolled out a new online credentials training program, starting with the Certified Departmental Purchasing Representative, to build uniform skillsets and competencies across the university.

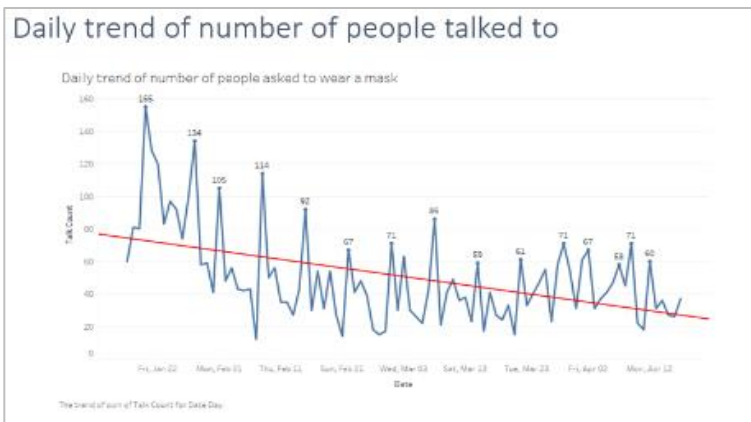


- Conducted annual State of the Endowment conference (virtual) with nearly 100 attendees.
- Repurposed [One Earth at Talley](#) into a student residential dining hall, to address student demand better by providing students with a centrally-located, safe place to dine and socialize during the pandemic.
- During the pandemic, Campus Enterprises quickly installed cashless point-of-sale for retail dining, coffee shops, Talley Market and Wolfpack Outfitters to speed checkout and minimize touchpoints. Post-pandemic, plan to continue and expand cashless point-of-sale, as the service improvement (speedy check-out, fewer errors) is a ‘big hit’ with customers and cashiers alike.
- Campus Enterprises maintained core services throughout the pandemic, adapting quickly and effectively to support all aspects of student, faculty, staff and visitor well-being on campus.
 - Immediately developed safe food establishment protocol for employees and patrons.
 - Quickly trained staff and modified establishments to ensure safe residential and retail dining – ensured zero gap in residential student dining.
 - Converted catering operations and trained staff to safely deliver boxed meals to quarantined and isolated students housed on campus; provided 300+ meals per day during peak quarantine/isolation periods (see right graph).
 - Partnered with Athletics to facilitate student athlete dining (via ‘family units’) amidst efforts to mitigate COVID-19 transmission – expanded student athlete dining at Murphy Center, Clark Dining and One Earth.
 - Implemented mobile ordering, cashless point-of-sale and contactless pickup for residential and retail dining, and Wolfpack Outfitters, to minimize/eliminate touch points.
 - Implemented bar code readers (contactless devices) allowing students to enter dining halls contact-free.
 - Established a takeout container exchange program at dining locations, to increase safe operations and eliminate thousands of disposable takeout containers.
 - With EMMC and UCOMM, created uniform signage for all physical space across campus to ensure a safe physical environment (occupancy limits, physical distancing markers, entrance/exit, line queuing signage).
 - One Card enabled upload of digital photos for new student IDs, negating the need to visit Talley to complete in person.
 - Transitioned NC State Stores commerce to online platforms with updated web content and advertising, increasing access for off-campus patrons.
 - Wolfpack Outfitters expanded online course materials offerings, online ordering and contactless pickup capabilities to better serve off-campus students and faculty.



Many of the customer service improvements and technology upgrades noted above will continue, post-pandemic, due to the higher level of customer service (faster, easier and more accurate processes), reduced costs and seamless availability of operating data.

- Trained customer facing staff regarding best approach to managing students and others who did not abide by community standards nor comply with face covering requirements (Talley efforts shown on right)
- With Student Health Services, established an on-campus vaccine clinic at Talley, State Ballroom. Across 44 days, SHS administered 9200+ vaccines and fully vaccinated 6300+ individuals.
- With EMAS, converted Talley large spaces (ballrooms, Stewart Theater) into classrooms. This collaboration led to the creation of new visitor center services at Talley (4th floor).

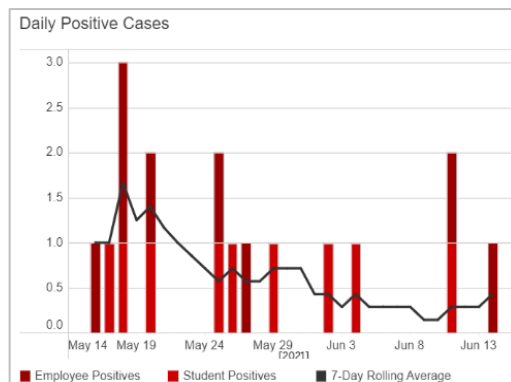


- Renovated Common Grounds Café and upgraded Shuttle Inn C-Store in anticipation of Fitts-Woolard Hall opening – renovations are integral to service upgrade plans for Centennial Campus.
- With Facilities and DASA, repurposed Harrison Field to **'The Den'**, providing a safe outdoor space for students to play lawn games, roast marshmallows, socialize and relax; staffed area and ran reservation process for games.
- **Lonnie Poole Golf Course** remained open and operational throughout the pandemic, enjoying its best year of business since opening:
 - 45,000 rounds played, the most in the course's history.
 - Top 20 Courses You Can Play (2021 NC Golf Panel rankings).
 - #1 Public Golf Course in Raleigh (2021 NC Golf Panel rankings).
 - 2021 Host Course: NC Amateur Tournament, GCAA Summer Series, Big Four Women's Match Play Championship
 - 2023 Host Course: NCAA Championship Women's Regional



- Transportation introduced new **daily and monthly permit options** (conveniently available online) for hybrid workforce, and new virtual permits for contractors, vendors and special events.
- Expanded use of Park Mobile app for visitor parking, a contactless parking experience for users and easier process for groups bringing visitors to campus.
- The Department of Risk Assessment adapted programming to reflect behavioral aspects of working during a pandemic, while continuing to enhance campus safety. Violence Prevention and Threat Management provided:
 - Virtual training programs, increasing training from 11 to 60+ separate events, examples include Workplace Violence Prevention & Guidance for Managers and Leaders, Bullying & Respect in the Workplace, and Threat Assessment Refresher Training for Law Enforcement Officers.
 - Virtual threat assessment and threat management services, increasing accessibility and case load for three case managers who provided direct management to 400+ new cases.
 - Increased cultural competence training in partnership with DASA Prevention Services on the Intersectionality of Mental Health, Racism and IPV in the LGBTQ+ community.

- Emergency Management and Mission Continuity led mission continuity efforts over the past year, collaborating with UCOMM, Provost’s Office, Office of Research and Innovation, OGC, OIED, UHR, SHS, EMAS, DASA, Athletics, OIT, EHS, Facilities, Campus Enterprises and numerous other groups across campus to ensure continued operations, to implement new policies and processes, and to inform the university community. Universitywide outreach efforts included:

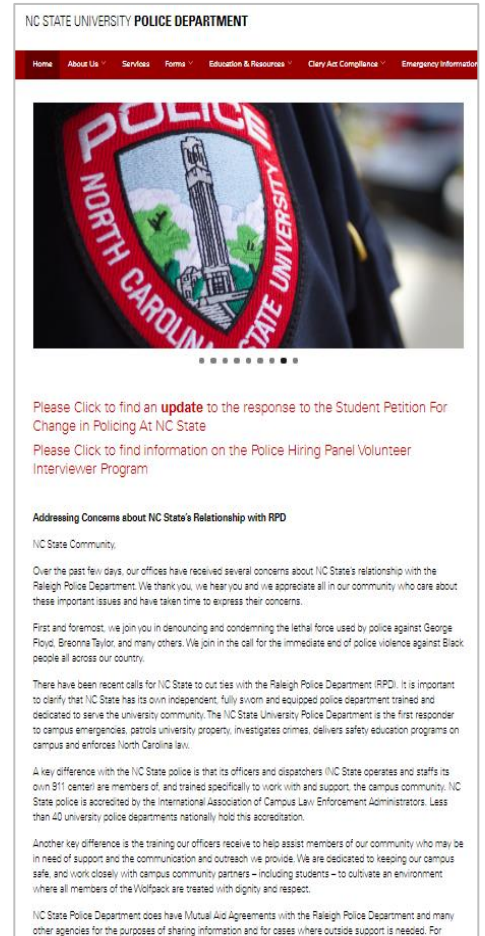


- [Protect the Pack website](#)
- [Working @NC State during COVID-19 website](#)
- [Community Standards](#) and [Supervisor Guide to Employee Conduct Expectations](#)
- [Pack Planning and staffing models](#) (spring 2021 and summer 2021) for more than 100 units/departments
- [Return to Campus \(Fall 2020\)](#) and [Resources for Faculty and State \(Spring 2021\)](#)
- [Required returning to campus safely during COVID](#) workplace training for all employees
- Consulted with Facilities on outreach videos focused on [classroom and building safety, cleaning and sanitation how-to videos](#), and [Wolfline bus updates](#)
- [Operations procedures](#), guides, protocols, forms, exception processes and approval routing (COVID self-reporting, face coverings and sanitizer requests, travel exception requests, special event requests, special circumstances requests, motor pool (fleet services) requests, surveillance testing exception requests, vaccination status, space and occupancy guidelines, safe cleaning and disinfection protocols, summer programming exception requests), processed:
 - 3,000+ travel exception requests.
 - 300+ special events requests
 - 100+ summer program requests (includes summer programs managed by ORI).
- Established [COVID testing](#) operations on-campus, worked with Student Health Services, DASA, OGC, CVM and Finance and Administration leadership to ensure appropriate staffing, supplies, logistics and funding; **conducted over 71,000 employee and over 142,000 student on-campus surveillance tests (Jan-June 2021).**

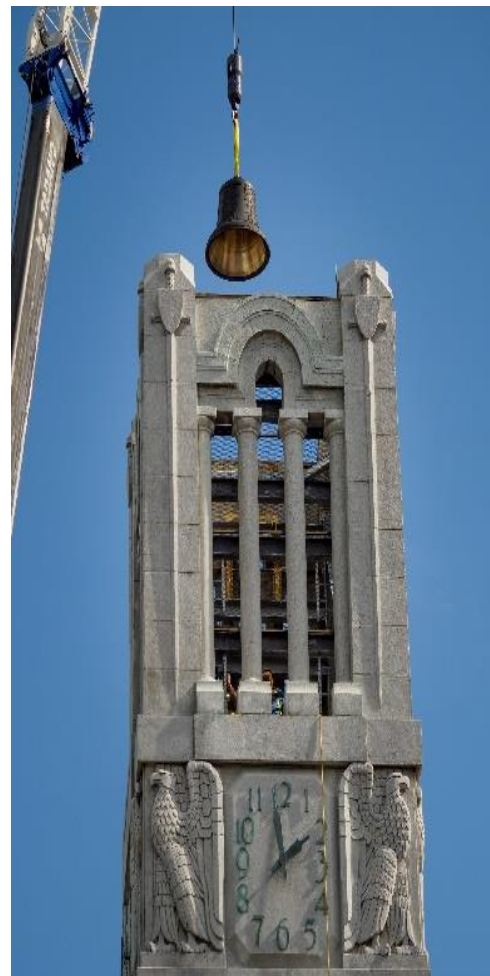
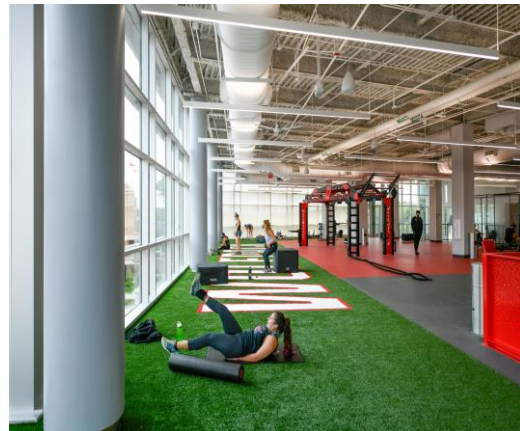


- Worked with Procurement and Business Services to [secure PPE supplies for campus](#) (cleaning materials, classroom preparedness kits, face coverings (vendor and NWI), hand sanitizer (vendor and BTEC), and established campus distribution process.
- Environment Health Services assisted colleges, departments and Principle Investigators, and advised ORI with safe [research restart](#) and standard operating procedures, laboratory checklists, space and occupancy reviews, return to campus guides and quick references (lab start up and inspection check-lists, hazardous waste and radiation safety lab protocols) – through all phases of Research Restart (I, II, III, III-B, III-C, IV).
- [Youth Programs and Compliance](#), in partnership with EMMC, developed PACK Ready Lite Plan for Youth Programs. Worked with hundreds of groups holding virtual youth programs and/or requesting to hold [oncampus youth programs](#) to establish safe practices and to support the exception request process for oncampus youth programming.

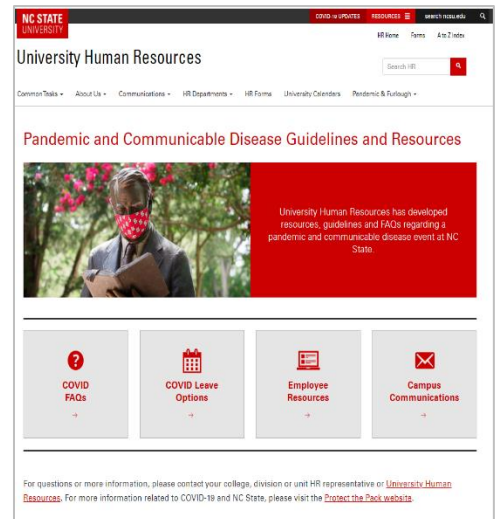
- New University Police Chief, Daniel L. House, Jr., led efforts within the University Police Department to improve community engagement, communication, and transparency:
 - Enhanced [UPD website](#) (see right image) and social media platforms; website redesign includes monthly statistics on traffic warnings and citation demographics, biased based profiling data/complaints, use of force data, complaints/IA investigations, agency and recruitment demographic data.
 - Developed new police business cards with QR codes linking to police reports and the UPD website.
 - Attended meetings with various groups across the university (Student Senate, Faculty Senate, Staff Senate, Facilities, and Athletics).
 - Created a platform for the university community to participate in the hiring process for police officers.
 - With other UNC SO chiefs, working to develop a standard report to collect CIMRS (CALEA Information Management and reporting system) information.
 - Served on NC State’s Racial Equity Summit Steering Team.
- The majority of the 850+ Facilities employees came to campus every day (and remained relatively disease free), ensuring that the university physical plant was safe and fully operational every day of the pandemic.
- Developed a COVID specific [indoor air quality plan](#) and evaluated every air handling system in every campus building to ensure highest air quality possible.
- Installed large outdoor event tents across campus, built 100+ picnic tables and installed 100+ chairs to expand dining and classroom seating capacity – will continue this effort, post-pandemic, to draw students, faculty, staff and visitors to previously unused outdoor spaces such as Den at Harrison Field, Court of North Carolina and Oval on Centennial Campus (see right image).
- Led efforts to rearrange classroom furnishings for physical distancing requirements, and placed signage in every classroom across campus indicating COVID protocols for seating, entry, exit and movement through buildings.
- Trained housekeeping staff on [COVID-19 Cleaning and Disinfecting](#) and thoroughly cleaned and disinfected buildings across campus to ensure the safest building environment possible (see lower right image).



- Construction continued unabated – no small feat during the pandemic when contractors faced logistical challenges stemming from supply chain disruptions, and onsite worker protocols forced schedules and project management adjustments. Significant projects completed last year include:
 - **Fitts-Woolard Hall** - \$137M, 225K GSF engineering building for Industrial and Systems Engineering and Civil, Construction and Environmental Engineering Departments, and office space for the College of Engineering Dean.
 - **University Wellness and Recreation Center Addition at Carmichael Gym** - \$45M, 83K GSF facility to replace aging two story admin and classroom building with a four story open space structure to house state of the art facilities in support of individual and group fitness (see right image).
 - **Academic Success Center at D.H. Hill Jr. Library** - \$15M modification and repurposing of the bookstack transformed a dated building and provided an exceptional space for students and faculty, enriching the student experience and supporting student success.
 - **Memorial Belltower** - \$6.5M completion of NC State’s most iconic structure, with a 55 bell carillon, new HVAC, ADA accessible path and reimagined ground area surrounding the structure (Facilities petitioned the System Office and State Construction Office to use the design-build process, first ever for a system institution; brought the Design-Build Institute of America to campus to provide training for NC State and other system institutions including UNC-CH and ECU.
 - **Thermal Energy Storage Tank** - \$9M, 3 million gallon chilled water storage tank funded through Plant Sciences Initiative to enable making and storage of chilled water overnight when electricity rates are lowest.
- Managed over 200 capital projects worth more than \$750M including the completed projects listed above and Exterior LED Lighting Conversion – Phase 1 (\$2.5M), Centennial Campus Substation Expansion (\$7.3M) and Bureau of Mines Renovation (\$6M).
- Completed 14 classroom projects (\$700,000, improved 33 classrooms), 17 safety projects (\$266K, addressed safety deficiencies) and 10 ADA projects (\$147K, addressed ADA deficiencies).
- Increased [Historically Underutilized Business \(HUB\)](#) percentage to 37%, up 4% from last year.
- Capital Projects Management continued its long-standing customer survey process, to evaluate and improve outcomes.



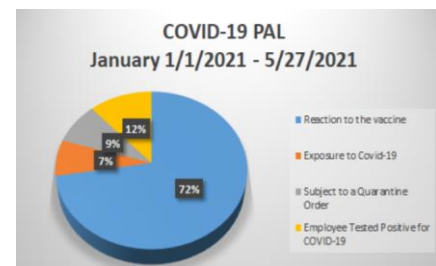
- Developed a comprehensive strategy to communicate critical, complex and fast-changing HR changes to more than 10,000 NC State employees and supervisors via increased meeting frequencies with stakeholders, increased mass email communications and an expanded website with dozens of new webpages.
- Increased meeting frequency for the HR Advisory Council (HRAC) from monthly to twice a month, and issued more than 100 major communications over the past year (30+ universitywide communications and 70+ communications to targeted groups such as SHRA employees).
- Developed and expanded the [Pandemic and Communicable Disease Guidelines and Resources website](#), to communicate critical, complex and fast changing information to 10,000+ employees and supervisors, including: COVID leave options, COVID related FAQs, employee resources for wellness, remote and alternative work, and COVID related campus communications; website visited 78,000 times (March 2020 launch - April 2021).
- Launched a [Furlough Resources and Information site](#), a [COVID-19 Voluntary Shared Leave Bank webpage](#), an [Employee Emergency Loan Program webpage](#), and a host of additional resources for the NC State community including:



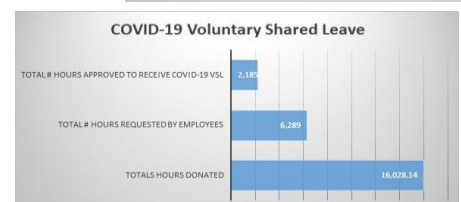
- [COVID-19 Leave Comparison Chart](#)
- [Work/Leave Options Chart for Parents](#)
- [COVID-19 Wellness Resources webpage](#)
- [Special COVID-19 Edition of Howl You Know](#)
- [Remote Work Toolkit](#)
- [Return to Onsite Work Video Modules](#)

- Developed COVID-related news articles for UHR’s monthly newsletters:
 - [How Supervisors Can Recognize Employees During the COVID-19 Pandemic](#)
 - [NC State Employees Sew Masks for Health Care Workers](#)
 - [Coping With the Challenges of Teleworking During a Pandemic](#)
 - [UHR Creates Return To On-Site Work Videos, Resources](#)
 - [Five Ways NC State Is Protecting the Pack](#)
 - [NC State Employee, Wife Host Learning Pod at Their Home](#)
 - [Reconnecting With the Pack](#)
 - [COVID-19 Vaccine Available at NC State](#)

- Administered the new Paid Administrative Leave (PAL), a separate paid leave bank for COVID-19 related reasons. From Jan 2021 – April 2021, processed 800+ PAL requests (see right image).



- Administered the new COVID-19 Voluntary Shared Leave program for faculty and staff to donate leave to employees in need of COVID-19 paid leave. 16,000+ hours donated over the past year (see lower right image).

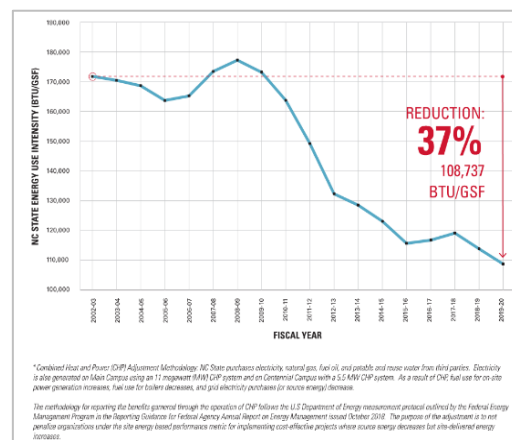


- During the pandemic, ran an innovative I-9 Drive-thru event and quickly established an I-9 Service Center to safely and efficiently serve newly hired employees requiring document inspection. Over 1,000 employees (summer 2020 hires) attended the three-day drive-thru event.
- With [Enterprise Application Services](#), implemented first steps of an online performance management system (rollout tentatively scheduled for 2022).
- [Centennial activation strategies draft](#) completed, outlining principles, strategies, initiatives for the university space.
- With UCOMM and Partnership Office, supported [Centennial Campus website](#) to position Centennial as a premier research park in North America, including [Visit, Partner, Research, Learn, Live and Work, and Thrive](#) webpages.
- Established a Centennial Campus Programming Group (June 2021 launch) to coordinate Centennial programming regardless of sponsoring unit or college.
- Creatively ensured Centennial activation programming continued amidst pandemic restrictions:
 - With NC State Arts, repurposed Spring Hill parking lot to hold live music concert series [NC State LIVE@Centennial](#)) in fall 2020 and spring 2021 (see right image),
 - In partnership with City of Raleigh’s Dix Park, facilitated pop-up Disc Golf (early spring 2021).
- Formalized Real Estate and Development key services and incorporated into site map for new website to create clear overview of services (and service delivery expectations).
- Uploaded all (65+) university space leases into Lease Query to create a system of record for lease accounting for use by URED and the Controller’s Office.
- Cataloged key real estate assets and services provided (and associated timelines for services) and key customers – to proactively manage and serve customer base.
- Throughout the pandemic, informed 25+ private tenants and private building owners on Centennial Campus regarding university COVID operations and expectations.

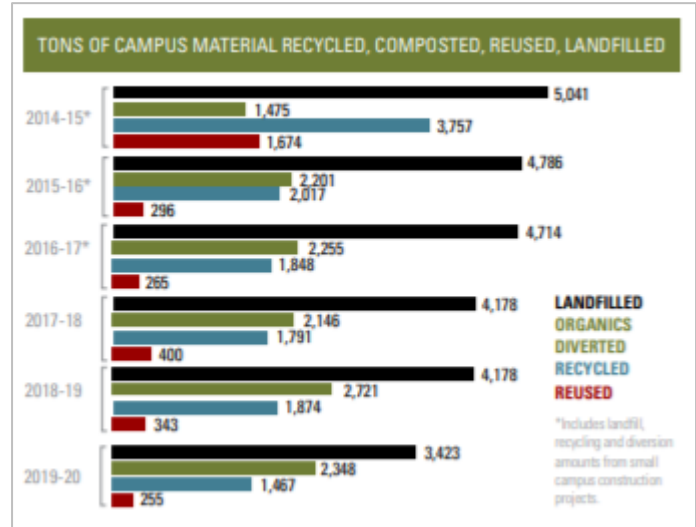


**Responsible Stewardship: Optimize resources to highest and best use
Steward, preserve and maintain assets
Improve operations to reduce administrative costs/burdens
Ensure compliance and mitigate risk**

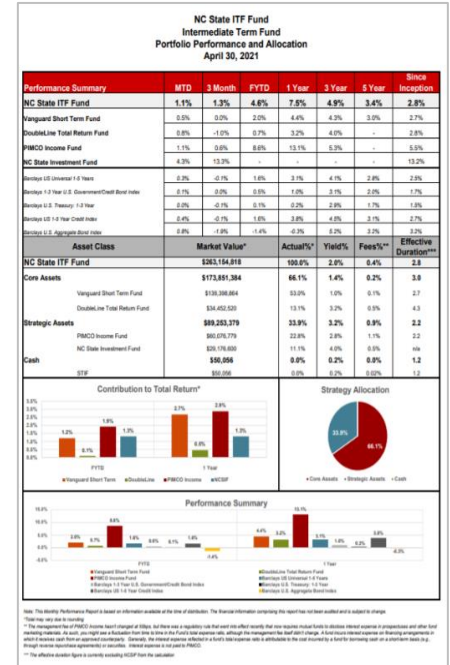
- Created a university-level budget dashboard to facilitate 'highest and best use' funding decisions, and to effectively communicate funding information with university executives and constituents.
- Served as the primary resource for university leadership regarding federal COVID relief funds (GEER, HEERF); facilitated Federal - State Relief Funds working group to discern 'highest and best' use of \$60M in federal COVID relief funds over the past year out of \$103M received by the university (\$43M remainder for direct student aid).
- Kicked off the Physical Master Plan effort including selection of third-party advisors and initial site visit (May 2021)
- Continued to advance the [Integrated Priority List \(IPL\)](#), and re-engineer the IPL to merge with the new Annual Spend Plan, to ensure highest and best use of university space, funding and resources.
- Advanced the [Electrical Infrastructure Upgrade Initiative](#), a \$65M multi-year project upgrade to the electric distribution system on Central and North Campus to a safe and reliable power supply; established communications plan (outages and disruptions), scheduled to commence in fall 2021.
- Realized [37% campus energy use intensity reduction](#) since 2003, due to the Combined Heat and Power (CHP) Adjustment Methodology, involving a strategic approach to purchase of electricity, natural gas, fuel oil and potable reuse water from third parties - to decrease grid electricity purchase (or source energy) (see right slide).
- With the College of Engineering and [NC Clean Energy Technology Center](#), created the largest renewable energy project at NC State to date (pending BOT approval).
- Avoided \$874K in energy costs over extended winter break (a new NC State record), via the [Holiday Energy Saving Initiative](#).
- Avoided \$495K YTD through recommissions Textiles Complex, BTEC, Partners I, Admin Services II, SAS Hall by adjusting building systems for operational efficiency; cumulative recommissions savings since 2014 nears \$10M.
- Throughout the pandemic, Energy Systems methodically evaluated every campus building to ensure ventilation systems provided the freshest air possible to each space, completed preventative maintenance on every component, and installed most effective filters for each system – an enormous undertaking with existing staff.
- Took advantage of a de-densified campus to improve facilities and grounds – many have said, “Campus has never looked better!



- Fostered NC State’s recognition for excellence in sustainability research, program and campus ops. In our first year participating in the [Times Higher Education Impact Rankings](#), NC State earned No. 1 in the U.S. and tied for No. 6 in the world for “Industry, Innovation and Infrastructure,” No. 7 in the U.S. and No. 41 in the world for “Clean Water and Sanitation,” and No. 7 in the U.S. and No. 64 in the world for “Zero Hunger.” (right image).
- Security Application Technologies completed initial high-level drafts of the new Security Master Plan (Phases 1-2).
- Security projects completed for Fitts-Woolard Hall, Carmichael Gym Renovation, D.H. Hill Jr. Library, Weaver Labs Phase II, Bureau of Mines, three Greek Houses, and projects supporting a network monitoring system, Poe Data Center move and a multi-site backup effort.
- Revised regulation 01.25.18 – Programs that Involve Participation of Minors to reflect best practice standards specific to virtual programs and activities and issued a corresponding [3D Memo](#).
- [Youth Programs and Compliance](#) worked with 4H and Athletics to determine efficient compliance tracking of programs involving minors; fulfilled university tracking requirements, increased reporting and approval tracking.
- Campus Enterprises leveraged pandemic-impacted operations and restrictions, fluctuating customer demand and steep auxiliary revenue loss into opportunities to restructure and reorganize in the best interest of business continuity, provision of services and employee retention and growth.
 - Cross-trained and re-assigned staff from low demand and closed operations to high demand and growth areas (redeployed staff from permanently closed McKimmon Café and outsourced operations at Park Alumni Center and Athletics Concessions to NC State Dining venues; eliminated cash handling positions due to new cashless point-of-sale, created new joint financial analyst role with the Controller’s Office).
 - Executed a new MOU with CVM to formally establish café operations and to clarify responsibilities.
 - Reorganized Rave! Events into [Rave Catering](#) and [Student Centers Events](#) to better serve customers and to establish a more centralized support and reservations process for Talley Student Union, Witherspoon Student Center, Duke Energy Hall at Hunt Library, and outdoor locations (Stafford Commons, Brickyard).
- Closely monitored NC State’s financial resources and liquidity throughout the pandemic and informed executives and BOT about financial performance trends during a year of financial concerns (such as auxiliary revenue loss).
- Managed ~ \$1.9B investments last year, striving to protect and improve the university’s financial resources.
- Endowment reached \$1.78B (estimated, as of 3/31/21) up from \$1.4B last year, with a FYTD return of 34%.
- Foundations Accounting and Investments managed investments for 3,129 endowments across the university.



- NC State Intermediate Term Fund provided \$19M more to participants since inception (than had participants remained in the STIF); NC State is the chief beneficiary of the \$19M additional unrestricted income, used for strategic initiatives, faculty and student programs.
- SRI Fund outperformed the global index and the private assets portfolio outpaced public market equivalents.
- Diversified intermediate term fund risk by moving funds from low yielding investments to higher yielding investments and exposure to equities.
- Created new quasi-endowments to improve long-term financial health.
- Transitioned Textiles Foundation accounting and financial management services and Student Aid Association (Wolfpack Club) to NC State Investment Fund.
- Worked with CALS to merge two Foundations, the NC Tobacco and NC Agricultural Foundation, to increase investment potential and decrease administrative overhead.
- Clean audits with unqualified opinions timely for 11 associated entities, 10 LLC's and a clean A-133 compliance audit for NC Ag Foundation.
- Redesigned the [Office of Investments website](#) to serve customers better with easy-to-understand information such as investment approach, governance and performance on various funds.
- Processed over \$100M in gifts this fiscal year, thanks to the fundraising efforts of numerous university partners.
- Continuing to develop and refine cashflow models, and to research sustainable investing and ESG strategies.
- Through the Partnership Corporation, worked with ORI, University Real Estate and Development, Non-Wovens Institute, Campus Enterprises, Provost's Office and others to create and enhance LLCs.
- First institution within the UNC System to test the new Finance DataMart, requiring extensive data validation.
- First university in North Carolina to implement [Paymode-X](#), an end-to-end payment automation system, considered best in class in virtual payments.
- To support electronic vendor payment and to reduce fraud risk, created a new [Supplier Information Management \(SIM\)](#) system incorporating a third party web-based repository for secure supplier banking information.
- Reduced number of vouchers processed by nearly 5500 (stemming from recent supply purchase threshold change from \$250 to \$,1000), cut processing time, eliminated shipping fees, reduced taxes paid and increased supplier discounts – amounting to an estimated \$137K in savings over the past fiscal year.
- University Real Estate and Development revamped strategic goals for the division, focused on operational enhancements to improve effectiveness and to maximize financial and physical resources such as implementing ground lease administration protocols to improve resource management and customer service.



- Successfully completed a [rezoning](#) request with unanimous approval by the City of Raleigh, to modernize the framework for Centennial Campus to advance the university's three-tiered teaching, research and statewide outreach mission (see right image).
- Continued to establish [Centennial Campus](#) as a go-to destination for Raleigh locals and tourists, including partnering with Arts NC State to produce two seasons of [NC State LIVE@Centennial](#) concert series at the Spring Hill parking lot – creatively repurposing this space during pandemic-restricted gathering limitations.
- Successfully completed negotiations with NC DOT for impacts to NC State land associated with the I-440 expansion project
- Conducted initial analysis of leased space occupancy, including users, types of space, expenditure and funding source, to ensure regular tracking of lease matters and to provide a forum to identify opportunities for consolidated/relocation (where NC State is tenant, and landlord);
- Working with the University Architects Office and university entities to identify available campus space in lieu of off-campus leasing.
- With university partners, actively engaged municipal groups and served on leadership boards/committees, to ensure university interests advanced and to foster cooperative working relationships with neighboring entities, including [Dix Park Leadership Committee](#), City of Raleigh, Hillsborough Street Community Service Corporation, and Blue Ridge Corridor Alliance.

