# Executive Summary – FY 22-23 Goals and Initiatives

The Office of Finance and Administration (OFA) successfully implemented 185 initiatives over the past 18 months, as part of OFA's new strategic goal setting efforts to drive transformative change. All OFA initiatives align with NC State's seven strategic goals, with 72% of our initiatives advancing NC State's Strategic Goal 5: Improve university effectiveness through transformative technologies, cutting-edge processes and actionable data - and served to move OFA into the new 'post-pandemic normal', refocusing efforts and resources into strategic planning, process improvements and transformational technologies. These accomplishments were achieved thanks to the leadership team and 3700+ employees within the Office of Finance and Administration, whose collective expertise, collaboration and dedication advanced strategic, impactful and sustainable initiatives across the NC State community.

NC State 2021-2030 Strategic Plan Goals	OFA FY22-23 Initiatives Completed by 7/1/23
Goal 1: Empower students for a lifetime of success and impact.	4 (2%)
Goal 2: Ensure preeminence in research, scholarship, innovation and collaboration.	9 (5%)
Goal 3: Expand and advance our engagement with and service to North Carolina and beyond, defining the standard for a 21st-century land-grant university.	5 (3%)
Goal 4: Champion a culture of equity, diversity, inclusion, belonging and well-being in all we do.	12 (6%)
Goal 5: Improve university effectiveness through transformative technologies, cutting-edge processes and actionable data.	133 (72%)
Goal 6: Lead in developing innovative partnerships, entrepreneurial thinking and applied problem-solving.	21 (11%)
Goal 7: Elevate the national and global reputation and visibility of NC State.	1 (1%)
Total OFA FY22-23 Initiatives (Completed by 7/1/23)	**185**

FY22-23 OFA Goals and Initiatives - Status as of 7/1/23
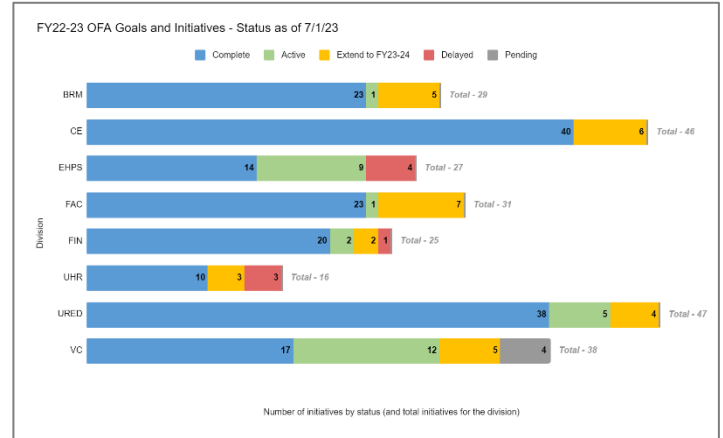
In support of the NC State Strategic Plan, Wolfpack 2030: Powering the Extraordinary, guided by our Principles of Work (Employee Engagement, Customer Service, and Responsible Stewardship), and collaborating with campus partners, OFA initiatives and efforts advanced 35 (nearly one-fourth) of the 144 three-year NC State FY22-24 Strategic Initiatives.

- Goal 1 (Student Success)   One initiative to enhance rapport between NC State University Police and the university community.

- Goal 2 (Research Preeminence)   Five initiatives to support infrastructure, space, safety and compliance across our research enterprise.

- Goal 5 (University Effectiveness)   Twenty-two initiatives to improve alignment of our physical resources with NC State priorities; to improve employee recruitment and retention; to adopt digital solutions and tools to enable data-driven decision-making; to improve customer service, resource management and organizational structure.

- Goal 6 (Partnerships)   Seven initiatives to develop infrastructures to support innovative partnering and our entrepreneurial ecosystem (Engineering North Carolina's Future, the Innovation District, Centennial Campus, research commercialization, innovation and economic development).

Within OFA, meaningful progress has been made to substantially advance business intelligence and budget planning capabilities to ensure senior leaders have the data - and visual analytics - they need to make the best strategic resource decisions. We have successfully completed the 10-year Physical Master Plan: Framing the Future and the Security Master Plan: Proactively Protecting the Pack to ensure long-term physical resource planning aligns with university priorities.

We have advanced NC State's new innovation district development on Centennial Campus, supporting the growth and evolution of the Centennial Campus ecosystem in furtherance of NC State's education, research and statewide outreach mission. We expanded our sustainability programming and impact through our Campus As A Classroom program, providing experiential learning and career-building opportunities for 20 student interns last year; and continued operational improvements across our physical infrastructure to reduce energy and water consumption, while diverting more than half of all campus waste from the landfill through recycling, composting or reuse.

In partnership with the Provost, we have allocated $20M funding to support faculty hiring for 'Engineering North Carolina's Future'. We have implemented digital transformation strategies to improve service delivery and to better manage resource consumption across our operations. We have made important hires including hiring a new Associate Vice Chancellor for Finance and University Treasurer, new University Controller and new Chief Investment Officer, to maintain and advance the financial integrity of our campus operations. The following annual report provides details about the Office of Finance and Administration FY22-23 accomplishments and contributions to NC State's mission and strategic plans.

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FY22-23 OFA Accomplishments - Highlights

## University Strategic Budget Initiative (USBI)

To align NC State's resources with the university's strategic priorities, implemented a strategic, university-wide budget process to ensure highest and best use of all fund sources available to the university. Adopted business intelligence and data analytics tools. Generated a budget resources dashboard (as discussed below) to support trend analysis and forecasting. Improved budget transparency, communication and engagement with university partners.

- Phase 1 complete (developed an interactive dashboard for senior management; provided five years of actual expenditures by funding source and account category; implemented five-year budget planning process for F&A).
- Phase 2 will focus on providing actual revenues and current year budget within the interactive dashboard; and implement a five-year budget planning process for all other funding sources (in addition to auxiliaries and F&A).

Executive Budget Resources Dashboard

Substantially advanced business intelligence and budget planning capabilities to ensure senior leaders (Chancellor, Provost, VC OFA) had the data - and visual analytics - they needed to make the best strategic decisions in support of NC State priorities. Employed SharePoint, Microsoft Power BI, SAS VA, Tableau, etc. to provide cohesive, comprehensive and visual data-driven analyses in one central, easy-to-use, online location. Dashboard includes:

- University Strategic Budget Initiation (USBI),
- University Strategic Reserves,
- Budget Balances Available (BBA),
- Cash management and year-end closing data,
- F&A Receipts,
- HEERF/CRF funds,
- Auxiliary Budget Reviews,
- New Funding Requests,
- Annual College Meetings,
- Legislative tracking of the Biennial Budget Process, and hyperlinks to other web-based resources such as Institutional Strategy and Analysis (ISA) CFO Dashboard, OSBM Budget Manual and UNC Policy Manual.
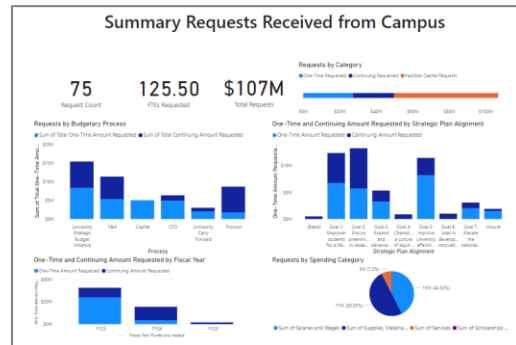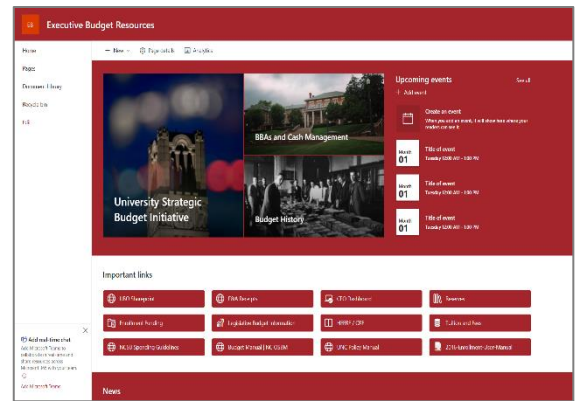
Strategic Master Planning

Completed the new 10-year Physical Master Plan: Framing the Future, to align physical resource planning with the university's new strategic plan. The new physical master plan encompassed six development principles, an inclusive campus development process, updated design guidelines, and a catalog of development opportunities across all campus precincts. Dining services and other impacts stemming from anticipated engineering enrollment growth were incorporated into the plan. Thousands of university community members were engaged throughout the effort, via public forums, surveys, task forces, presentations and a dedicated website. Plan approved by the BOT Buildings and Property Committee in June 2023.

Completed the new 10-year Security Master Plan: Proactively Protecting the Pack, to provide an updated strategic, operational and resource management tool to guide NC State as it expands security across campus. This new plan establishes a standard, comprehensive strategy to enhance university security – and serves as a best practice template for advancing our physical security initiatives.

Centennial Campus Ecosystem and Innovation District Development

Achieved significant milestones in the progression of NC State's new innovation district development on Centennial Campus, supporting the growth and evolution of the Centennial Campus ecosystem in furtherance of NC State's education, research and statewide outreach mission. Initial permit applications were filed for common infrastructure to support the project and the planned science/technology-focused lab building (anticipated to be the first building in the development). Planning continues to advance for retail/amenity spaces that will serve the occupants of the new development, and the Centennial Campus community at large.

The Centennial activation program continued to expand its programmatic impact, delivering The Corner, a new community gathering space on Centennial Campus - transforming a well-located yet under-utilized campus site into a meeting/event venue, and serving as a prototype for dynamic 'collision zones' to support the growth and the evolution of the Centennial Campus ecosystem.

Engineering North Carolina's Future

In anticipation of 40% enrollment growth stemming from the 'Engineering North Carolina's Future' initiative, worked with the College of Engineering to identify near-term space solutions (30,000 SF freed up) to bridge the college's space needs over the next three years. To optimize space utilization and flexibility, transitioned university users of spaces from a 'rent model' to a new Space Contribution MOA allowing growth of strategic programs without concern of expansion of rents. In partnership with the Provost, allocated $20M funding to support faculty hiring for this expansion.

Integrated Sciences Building

Completed significant work to advance the $180M Integrative Sciences Building. Commenced utility and site work for the 155,000 GSF facility - enabling new interdisciplinary approaches to the sciences consisting of classrooms, teaching labs, research labs, research core facilities, collaboration/study space (including a café) and office space focused on life-science molecular sciences including chemistry, biochemistry, biological sciences, physics, engineering and veterinary medicine.


Sustainability Programming

Sustainability programming and impact continued to expand, in support of NC State's strategic values focused on excellence, community, collaboration and sustainability. The multi-disciplinary Campus As a Classroom program provided experiential learning and career-building opportunities for 20 student interns last year (54 since inception, three years ago) across eight departments and three colleges, fostering collaboration between students, faculty and staff. Internships included data collection and modeling to improve route efficiencies and to reduce emissions for bus lines and waste pick-up; to identify optimal EV charging locations; to reduce energy use (research freezers, fume hoods, lighting); and to encourage and implement renewable energy use on campus.

Our student-led Sustainability Stewards program promoted sustainable practices across the NC State community through outreach, events and projects, including the annual Energy and Water Competition and the installation of three new campus green havens - transforming underutilized areas into gardens and green-spaces to promote student wellness (Nelson North Plaza, Governor Scott Courtyard, Talley Green Terrace).

Energy use has declined 35% since 2003, potable water use has declined 59% since 2002 and our landfill diversion rate is at 55%, thanks to intentional efforts to manage resource consumption and operational performance. Mechanical equipment calibrations and HVAC schedule improvements have improved the efficiency of buildings across campus; LED lighting installations are projected to save $100,000 annually; and holiday energy setback initiatives are reducing energy consumption during university breaks. National certifications continue to solidify NC State's reputation as a leader in sustainability programming, including a Gold Rating from the Association for the Advancement of Sustainability in Higher Education; #7 US ranking for sustainability impact (Times Higher Education 2022 Impact Ratings), #18 2022 Princeton Review's Top Green Colleges list; Tree Campus USA, Bee CampusUSA, Bicycle Friendly University, Green Seal Housekeeping and 1.9M square feet of LEED certified space.
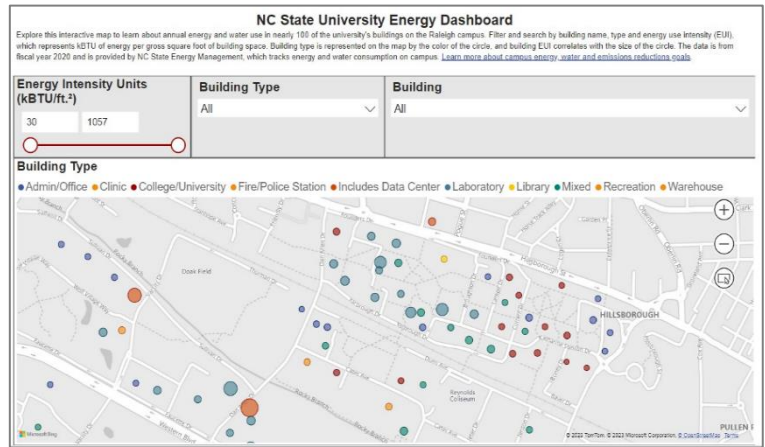
Investable Asset Management

NC State and its Associated Entities investable assets continued to grow, with a value of approximately $2.5B this year. Hired NC State's first dedicated Chief Investment Officer to lead the Office of Investments team. Deployed new accounting software to improve processes, controls and reporting; and continued to work with entities across the university to instill best practices. Again this year, audited financial statements and form 990's were filed timely with no findings for all ten entities managed by Foundations Accounting and Investments.

Best-in-Class Employee Programming

Expanded employee recruitment, retention and career development programming to bolster NC State's reputation as a top employer (as recognized by Forbes, Aug 2022) and to mitigate costly turnover trends.

- Initiated KPI dashboards to track recruitment and retention stats, including turnover and time to hire.
- Redesigning UHR website to promote NC State as a premier employer to potential applicants, to better market HR services internally, and to integrate HRNow (online service ticket platform and knowledge base repository).
- Launched Wolfpack Performance Program, an e-performance management system.
- With OIT, developed a new online flexible work arrangement request form to provide a standard, consistent process for employees and supervisors to request/approve flex work arrangements, and to enable data collection and analysis of program usage.
- Established NC State's Employee Value Proposition, to build workplace culture and to articulate career building blocks.
- Hosted first-ever Red and White Fest: An Employee Celebration, coinciding with Red and White Week (fall 2022). Nearly 2,000 faculty and staff attended the event at Miller Field.
- Facilitated our first Extraordinary Pack Employee Appreciation Week (spring 2023) with daily on-campus and virtual events, social media campaign, and a dedicated website to encourage participation.
- Hosted NC State's 2023 Awards for Excellence, recognizing 12 non-faculty employees for outstanding accomplishments and contributions, who will advance to the Governor's Award for Excellence. (Six NC State employees have won the Governor's Award for Excellence since 2015). Implemented a dedicated webpage to promote college and units awards for excellence programming, and to recognize 278 nominees this year.

Digital Transformation

Stemming from Post-covid task force reports, implemented cashless initiatives to reduce overhead costs and risks; adopted e-commerce, point of sale software and web-based tools within retail-focused auxiliaries; and expanded real-time data collection efforts to better serve customers and to better manage operations and resources.

- To reduce the risk of delayed or lost tuition checks sent by mail, the University Cashier's Office implemented Flywire's new electronic 529 payment system. Within the first year, over 400 student tuition payments were electronically processed across 33 529-plans.
- The University Controller's Office continued to enhance provision of e-manuals and web-based resources via its revamped website, including completing and publishing IDT Manual and Spending Guidelines.
- In partnership with Athletics, NC State Dining implemented new biometric credentialing for student athletes at Murphy Center training table meals.
- Wolfpack One ID Card incorporated AI into its photo upload and acceptance process, quickening the task for student users and essentially eliminating the need for manual review.
- Procurement & Business Services expanded its dashboard capabilities, adding year over year procurement data and trends for all purchase and payment types, POS, MP orders, PCard and Voucher. The dashboard provides colleges and divisions with five years of summary and detailed procurement data, which may be reviewed and exported at the 2-digit (college/division summary), 4-digit (department summary) and 6-digit (program specific) OUC levels. Enhanced abilities to analyze comprehensive and update to date procurement data will greatly support budget planning and resource management across all levels of the university.
- Building on user feedback and click data from 16,000 searches, expanded the Finance Division Knowledge Base, a web-based repository, by adding 1000+ new, relevant articles and upping the search success rate to 70%.
- UHR implemented the first phase of a university-wide online performance evaluation management system, Wolfpack Performance Program (WPP), replacing the university's paper-based evaluation process with a more effective and efficient evaluation process - ensuring more consistent and uniform electronic record-keeping for NC State's approximately 6,000 non-faculty employee performance evaluation reviews.
- Campus Enterprises implemented new NetSuite software, to provide point-of-sale, e-commerce, inventory management, data analytics and other operational information. Point-of-sale upgrades impacted 65 customer points of contact within NC State Dining, alone.

- NC State Dining deployed new mobile ordering and pickup apps (new food pickup lockers at the Atrium, new digital Bluetooth networked menu labels at Clark Dining), and implemented a real-time customer feedback system (TxtandTell) to improve customer service across dining venues and student centers.
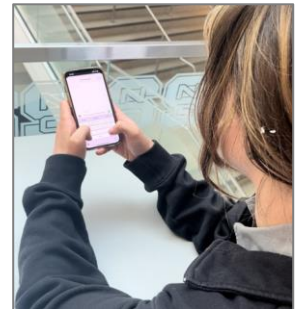
Continuous Process Improvement

Examined workflows to streamline and quicken processing, to reduce manual tasks and errors, and to mitigate risk.

- UHR implemented a consolidated no-pay appointments process, reducing unpaid job codes by 92%, and dropping the number of active unpaid appointments by 20%.
- UHR and Campus Enterprises prototyped a new OneHR model, to accelerate hiring processes by credentialing, leveraging, and empowering field HR staff on key tasks. With this new model, hiring times declined by one week or more – critical success for these hard to fill roles.
- The University Cashier's Office worked with university partners to reduce cash collection sites from 100+ to less than 15, leading to lower administrative costs (armored car services) associated with cash collections on campus.
- To better analyze the new role of tuition as a revenue source, the University Cashier's Office expanded tuition accounts to now capture tuition accounts by graduate in-state, graduate out-of-state, undergraduate in-state and undergraduate out-of-state (previously, only resident/non-resident accounts were utilized).
- University Payroll reworked content for the 9-Month Deviated Contract training sessions, to better address common errors associated with this process.
- University Payroll updated its disaster recovery plan and testing protocol to ensure backup processes and redundancies worked as expected.

- Contracts and Grants streamlined workflows and increased cross-training, to improve monthly invoicing (monitoring and measuring), drawdown and other AR processes; and improved the wire and check deposit process leading to more timely deposits.
- To reduce third party administrator costs, Foundations Accounting and Investments (FAI) engaged a fintech company for asset managers, to implement operational improvement strategies. FAI is in the final stages of converting historical investment accounting data, with plans to run parallel accounting starting in fall 2023.
- To strengthen internal controls and to reduce fraud, Foundations Accounting and Investments overhauled its website, securing sensitive data behind the university's firewall.
- FAI reviewed investment software and terminated obsolete/redundant contracts, eliminating $40K of expenditure.
- To simplify project intake and to improve communication with customers, Facilities launched the ReADY e-portal, an electronic workflow website for project planning/initiation, including utility shutdown and maintenance requests.
- Campus Enterprises substantially upgraded its budget planning and management processes via digital tools:
    - Implemented a web-based, budget planning page to organize CE's annual budget planning information and files into one, central, accessible online location,
    - Created a 15-Year Capital Investment Plan template, with detailed project/cost sheets and summary reports,
    - Formally documented CE's cost allocation methodology and summary table of costs,
    - Created budget planning templates for CE administrative units (Fin & Bus Mgt example),
    - Structured a formal submission and review process for supplemental budget requests.

Improved Services and Facilities

- Advanced 70+ capital construction projects, valued near $945M, including the $180M Integrative Sciences Building and $58.8M Electrical Distribution System Upgrade (Power Forward).
- Opened Elements Cafe at the renovated Jordan Library, to address a 'food desert' area of campus and to support activation of the library space.
- Expanded Varsity Parking Lot to add 450 new spaces (fall 2023 completion), a $5.5M capital project to provide additional parking capacity for resident and commuter students as preparation for Centennial Campus growth.
- Introduced new non-expiring employee parking permits, to eliminate annual parking re-enrollment tasks.
- Campus Enterprises implemented its first ever 'Good Idea Fund (GIF)' to encourage operational improvement ideas from unit managers, supervisors, and employees.
- With the Council on Status of Women and Graduate School, extended paid parental leave to post-docs.
- University Payroll implemented a new tax reporting module to support FLI/MLI tax requirements across several states (CT, CO, WA and OR).
- The 11th annual MarketPlace Expo expanded virtual offerings in addition to the in-person event, to successfully connect hundreds of purchasing decision makers with MarketPlace vendors, to learn about new offerings.

OFA Senior Management Team

- Hired a new Associate Vice Chancellor for Finance and University Treasurer and a new University Controller, responsible for overseeing $2B in financial services and transactions across the university .
- Hired NC State's first dedicated Chief Investment Officer to lead the Office of Investments, responsible for NC State's approximately $2.5B investable assets.

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Strategic Plan Alignment and Advancement

Goal 1: Empower students for a lifetime of success and impact.

- Enhanced the new 'Campus As A Classroom' program, coordinated by the University Sustainability Office, to engage students in campus sustainability improvement projects. Last year, 20 student interns worked on sustainability projects across eight campus departments, seven academic courses and three colleges.
- Thirty students participated in the Sustainability Stewards leadership program, which hosted 13 educational events last year; created a solar installation on campus, and received grant funding to create a green terrace at Talley Student Union.
- Provided guidance for Student Government and Staff Senate on best practices to eliminate non-essential single use plastics on campus, in support of their recent resolutions.

Students in the Stewards sustainability leadership program created this campus solar installation.

- University Police conducted nearly 1000 safety programs/community engagement events last year; and, with Emergency Management and Mission Continuity, hosted quarterly meetings with Student Government leadership to ensure partnership programming addressed current student concerns, and conducted a joint campus security night walk to identify after-dark security concerns.
- Achieved all required real estate approvals for University Towers residential lease and building acquisition; and fully executed legal documents covering operations during the lease period, including the dining program procurement/agreement.
- Nearing completion of the $47M Greek Village Townhomes and Apartments.
- Witherspoon Student Center renovations underway ($1.5M), providing a new fire alarm system, new bathrooms on the ground level and a complete modernization of room 126, the building's primary meeting and event space.

Goal 2: Ensure Preeminence in research, scholarship, innovation and collaboration.

- Advanced more than $1B in capital projects across planning, design or construction phases to promote research, scholarship, innovation and collaboration across the university community.
  - Design (formal) - 47 projects work $486M
  - Design (informal) - 160 projects work $29.4M
  - Construction (formal) - 23 projects worth $453 M
  - Construction (informal) - 51 projects worth $12.8M
- Commenced utility and site work for the $180M Integrative Sciences Building (STEM Building). Construction of the 155,000 GSF building is expected to be completed by August 2026.
- Advanced 15 out of 24 (62.5%) State Capital and Infrastructure Fund (SCIF) projects to design or construction stages.
  - Approximately $295M of the total $390M (75.6%) worth of SCIF projects are underway, with the higher priority projects progressing.
  - Multiple SCIF projects in the same building, such as Mann Hall, were combined to execute the project more strategically and to expend SCIF funds more efficiently.
- Established a new laboratory inspection group within Environmental Health and Safety (EHS); embedded EHS personnel more strategically across college hazardous research activities via formal staff assignments onto safety committees.
- Launched new software to more comprehensively manage our lab safety inspection program to track corrective actions to closure - to proactively provide researchers with lab safety guidance, education and requirements, and to improve compliance.

Goal 3: Expand and advance our engagement with and services to North Carolina and beyond, defining the standard for a 21st-century land-grant university.

● The new, 10-year Physical Master Plan: Framing the Future, was approved by the Board of Trustees Buildings and Property Committee - including the designation of The Oval as the tenth Hallowed Place.

● The Centennial activation program continued to grow, delivering The Corner, a new community gathering space on Centennial Campus.

● Facilitated 30 activation events designed specifically for the Centennial Campus (and neighboring) community; and processed 100+ space requests for Centennial Campus, up 30% from recent years.

● In support of 'Engineering North Carolina's Future', worked with the College of Engineering to identify near-term space solutions to bridge the space needs of the college.

● For the UNC-System, Youth Programs and Compliance served as subject matter experts and developed a benchmarking survey instrument for the UNC-System to survey protection of minors programming across the seventeen UNC institutions.

● The second iteration of NC State's 10-year Security Master Plan: Proactively Protecting the Pack, completed this year, and continues to serve as a best practice template for UNC System institutions and public agencies across the state.

● Emergency Management was selected by the FBI and Y-12 Nuclear Security to host two emergency preparedness exercises, 1887 Silent Thunder and Curious Disintegrations. The several day exercises involved over 100 local, state and federal response agencies with over 600 participants.

● The University Police Department served as an authorized partner for the US Department of Defense's SkillBridge program, providing retiring service members and those transitioning out of active duty with skills-building opportunities and employment contacts in the civilian sector.

Goal 4: Champion a culture of equity, diversity, inclusion, belonging and well-being in all we do.

● To enhance staff recruitment and onboarding, revised the Employee Entrance Experience Survey conducted by the Onboarding Center. And, enhanced the Employee Exit Survey, to increase feedback data specific to workplace culture and reasons for leaving university employment.

● Hosted seven virtual information sessions (in English and Spanish) and created a comprehensive benefits enrollment website to assist employees during the annual benefits enrollment period (fall 2022). Achieved 96% enrollment.

● UHR and the Council on the Status of Women reviewed the new Paid Parental Leave Program, to identify service gaps - leading to the extension of paid parental leave to post-docs.

● In partnership with DASA, championed the Menstrual Equity initiative to provide free menstrual products across campus. Established a pilot and installed standardized ADA accessible dispensers in heavily trafficked buildings and restrooms, and provided regular product restocking.

● Campus Enterprises employees played a key role in driving Staff Senate's Digital Access and Inclusion Project - to reduce barriers to online communications and engagement opportunities, to build technology skills and to create new training opportunities for frontline employees.

● Campus Enterprises created a new Professional Advancement in CE (PACE) program, to increase employee awareness of advancement opportunities and participation in skills training. Documenting advancement paths and sequence, identifying skills competencies, and encouraging on-the-job learning, supervisor mentoring and calibrated professional development are key aspects of this new employee engagement and retention effort.

● The fourth cohort of 16 employees for the Facilities Leadership Development Program was selected. To date, 50 employees have participated in this leadership program, available to all employees within Facilities.

- The Transportation website, featuring bus schedules, road closures/detours, parking information and how-to videos, was recognized as a 2022 Web Accessibility Champion by OIT in the 501-1000 page category.
- Facilities increased Historically Underutilized Business (HUB) certified contractors to 23.45%, far above the goal of 10% participation. 11 of the 31 designers selected for the Open-ended Service Agreement Designer Selections were small businesses, disadvantaged businesses, or woman-owned businesses.
- Procurement & Business Services improved HUB vendor participation by re-orienting purchase categories where competition is required, participating in the federal Department of Administration training sessions, vendor workshops and reverse vendor shows to strengthen HUB office relationships. Last year's HUB spend exceeded $11.5M.

Goal 5: Improve university effectiveness through transformative technologies, cutting-edge processes and actionable data.

Transformative technologies

- Implemented business intelligence tools (SharePoint, Microsoft Power BI, SAS VA, Tableau, etc.) to provide data analytics and visuals in support of strategic budget planning at the executive level.
- Campus Enterprises' new TxtandTell mobile device feedback service received hundreds of comments since its inception mid-year, leading to improved customer service across dining venues.
- Wolfpack Outfitters is continuing to embrace digital content delivery and an opt-out model, to reduce course material costs for students; and continues to evaluate 'equitable access' business models.
- Wolfpack Outfitters' online catalog and website presence continue to grow, increasing online sales 10-fold over the past five years, and increasing gameday concession sales to record levels.
- Transportation received nearly $150K to fund 10 new e-vehicle charging stations on campus, thanks to the Volkswagen Settlement Grant - Phase 2 Level 2 State Agencies Program.
- The Sustainability Office created a new, interactive Sustainability Map highlighting sustainable features across campus: local food and community gardens, pollinator gardens, beehives, high performance buildings, solar energy, water quality and conservation, zero waste workplaces, composting, EV charging stations, bike resources, and commuter showering sites.

- UHR, in partnership with UCOMM, launched the WolfpackAtWork Twitter account, to engage faculty and staff, share university news, show off Pack pride - with the goal to promote NC State as a great place to work.
- UHR created a new Project Management Office and website to facilitate design and delivery of HR projects, to offer agile project management and to communicate project status with senior leadership.
- With OIT, UHR launched a new online flexible work request process and automated workflow - to standardize and streamline the request and approval process, and to collect usage data.
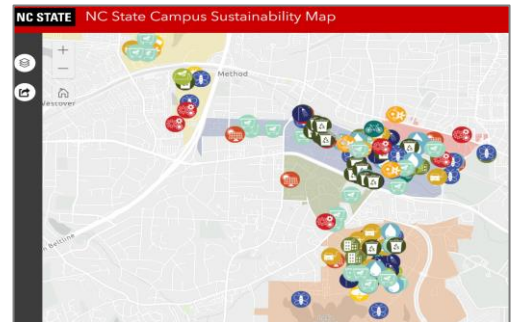
Cutting-edge processes

- Power Forward, a $58.8M project to upgrade the electrical distribution system through north and central campus (improve reliability and safety, position for growth), is about 40% complete and within the original budget estimate. Phase 1 is complete. Phase 2 is about 39% complete. Phase 3 construction will begin soon. Phase 4 (final phase) is in design.
- Facilities' Commissioning Team, in partnership with Building Maintenance and Operations technicians, achieved $2.5M in savings thanks to mechanical equipment calibrations, sequence adjustments, optimized HVAC operations.
- Completed the first phase of the Exterior Lighting LED Conversion project, converting nearly 1,200 pole-mounted lights (over 50%) to LED.
- Facilities created the Safety Management Advisory Panel (MAP) to analyze root causes for workplace mishaps leading to sprains and strains (the most common injuries) in its workforce. Tactics to reduce sprains and strains injuries will be rolled out in summer 2023, and injury rates will be monitored to assess impacts.

- EMMC implemented a web-based event portal and new risk assessment process to support use of campus space, per revision of [REG 11.55.02 Use of University Space](#). The collaborative, pro-active process applies to all university properties and includes university affiliate and non-affiliate events. Campus Enterprises (including Student Centers), Facilities, University Real Estate and Development, Registration and Records, DASA, Insurance and Risk Management, University Policy and University Communications participate in the risk assessment, which is facilitated by EMMC.

Actionable data

- To better analyze tuition metrics, the University Cashier's Office implemented new tuition accounts as required by the UNC System Office, categorized by graduate in-state, graduate out-of-state, undergraduate in-state and undergraduate out-of-state (previously, tuition accounts were categorized by resident/non-resident only).
- To more effectively manage financial lease data, and to assist in complying with the new GASB lease reporting standards, Real Estate and Development and the University Controller's Office completed a year-long effort to upload leasing data to the university's financial system.
- Thanks to the implementation of Netsuite, CE is able to measure year-over-year sales and inventory performance for in-store POS-based sales, and has added full year-over-year analytic capabilities. An internal 'checker' program has supported in-store online order pickup tracking, to provide real-time usage and ops data.
- Campus Enterprises created a cost optimization staffing tool to evaluate staffing levels and employee composition within each operating unit - to provide workforce metrics necessary to gauge the impact of recruitment and retention initiatives.
- Insurance and Risk Management facilitated property insurance for 1425 buildings, amounting to $5,935,025,422 in total insurable value. Thanks to the implementation of a new insurance management e-tool, Origami - and data-driven collaborations, the property insurance deductible was reduced from $100,000 to $5,000.
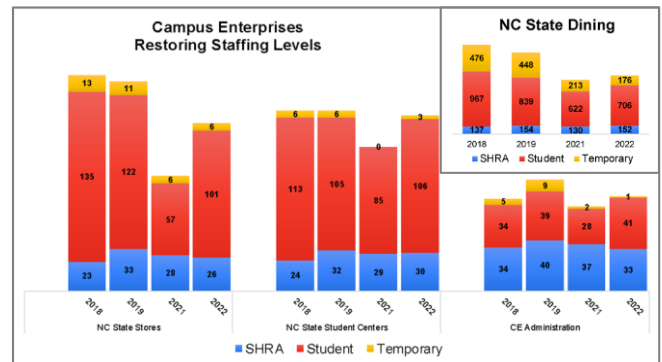

Goal 6: Lead in developing innovative partnerships, entrepreneurial thinking and applied problem-solving.

- Campus Enterprises extended the university's long-term Coca Cola pouring rights agreement and secured new marketing resources for NC State; and partnered with Strategic Brand Management on their new [321 Coffee sponsorship,](#) a branded sales effort at Wolfpack Outfitters.
- To improve collaboration and transparent planning, Facilities' Integrated Priority List (IPL) has evolved to identify strategic capital work >$300k and a more operationally focused Annual Spend Plan (ASP) for work under $300k. Each list is prioritized with customer input and openly shared with university stakeholders.
- Facilities, Transportation and Real Estate and Development collaborated with the City of Raleigh and NCDOT on several initiatives to ensure coordination and communication: I-440 Widening, Pullen/Western Bridge Replacement, Western Blvd. Bus Rapid Transit Corridor Study, Pullen Road Sidewalk, and Varsity Drive Widening.
- Budget, Campus Enterprises, EH&PS, Facilities, Finance, Real Estate and Development, and UHR served on university committees focused on top university priorities and lent expertise to committees, task forces and work groups focused on Engineering NC's Future, Centennial Campus Art, Physical Master Plan, Integrative Sciences Building, University Space Committee, Stormwater Management Advisory Committee, Council on the Status of Women, Staff Senate, workgroups (new drug and alcohol workplace testing regulation, new interdisciplinary initiatives funding model, new summer school funding model) and many cross-functional search committees.

## Goal 7: Elevate the national and global reputation and visibility of NC State.

- Redesigning UHR website to promote the university as a premier destination for prospective employees, to better market UHR services to the university, and to fully integrate the HRNow platform, a new service e-tool (redesign in progress, to complete in 2024).
- NC State earned a Gold Rating from the Association for the Advancement of Sustainability in Higher Education (AASHE), and its highest score yet on AASHE's Sustainability Tracking, Assessment & Rating System (STARS) report for universities to measure their sustainability performance - placing NC State in the top third of the nearly 250 schools with current STARS ratings.
- Subject matter experts invited to present at prestigious national conferences and appointed to leadership and board roles across national professional organizations.
    - CUPA-HR
    - National Association of College and University Food Services
    - Institute Facility Management Association - Hospitality Council
    - International Parking and Mobility Institute
    - University Surplus Property Association
    - Bank of America Card Product Advisory Board
    - Amazon Business Customer Advisory Board
   - PaymentWorks Customer Advisory Board
    - Flywire Advisory Board

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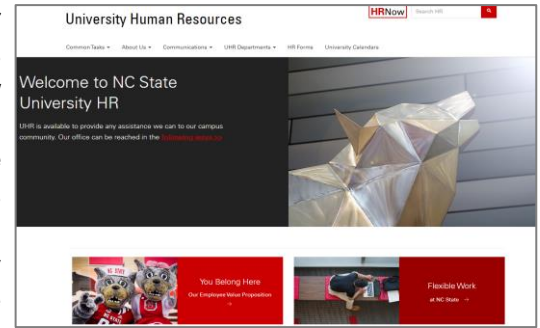
Finance and Administration - By the Numbers

Services and Operations
- NC State Dining served 4.1 million meals, a 9% increase over 2022-23 meal plan meals.
- Rave! Catering achieved record revenues of $2.9M, compared to $162.5K two years ago (pandemic low).
- Nearly 3 million passengers rode Wolfline buses.
- Youth Programs and Compliance engaged over 200 partners that hosted educational and athletics camps.
- UPD staffed 287 special events, up from 202 events the previous year; and conducted nearly 1000 safety programs/community engagement events.
- UPD received 55,347 calls for service last year.
- The Department of Risk Assessment conducted training for 8700+ participants, managed over 550 new cases, and received over 3100 concerning behavior referrals.
- Fire and Life Safety conducted nearly 150 building inspections; and, with University Housing, conducted 14,000 room inspections; and completed nearly 600 facility construction reviews and code consultations.
- Over 1,000 fire watches, alarm responses, tests and evacuation drills were conducted last year.
- Fire and Life Safety responded to 569 emergency calls last year (emergency, fire and medical) and provided support to nearly 500 campus events.
- Security Application and Technology maintained 3100+ security cameras, 3800+ door access points and nearly 30 security stanchions.
- EHS inspected 750 laboratories and 600 fume hoods.
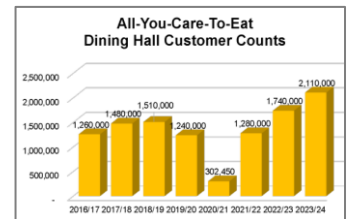
- 1425 Buildings insured last year, with $5,935,025,422 total insurable value.
- 2500 Vehicles insured last year, with 21 claims.
- Maintained nearly 1,200 buildings on more than 100,000 acres across the state (699 buildings and 4,740 acres are within the six Raleigh-based precincts)
- Completed over 81,000 facility work orders and processed 600+ facility modification requests.
- Conducted dozens of forums and presentations to ensure the university community was involved in the Physical Master Plan effort:
    - 10 Forums (open to the public)
    - 23 Pop Up Events
    - 4 Surveys: Responses from 1,283 Students, 189 Faculty, 689 Staff and 157 Alumni/Community members
    - 6 Task Forces (23 members each on average)
    - 4 Governance Groups (Campus Design Review Panel, Executive Committee, Steering Committee, Board of Trustees Buildings and Property Committee)
    - Focus group discussions with Athletics, Dining, Housing, and Transportation and others
    - Presentations and discussions with internal groups (University Council, ALM, Student Senate, Orientation Counselors) and external entities (Blue Ridge Corridor Alliance Board, Hillsborough Street Community Service Corp. Board).
- Materials Support programs diverted 590,000 pounds of the 763,000 pounds of surplus property processed.
    - 42,000 pounds through public surplus property sales
    - 54,000 pounds through sales to campus departments
    - 116,000 pounds through recycling efforts
- More than half of all campus waste was diverted from the landfill through recycling, composting or reuse.
- Campus energy consumption declined 35% per gross square foot since FY2003 baseline. The university aims for a 40% decrease in energy use intensity by 2025.
- NC State's total water consumption decreased by 51% compared to the FY2002 baseline, with potable water consumption decreasing by 59%.
- Executed 22 new or renewal leases throughout the state, totaling 61,422 SF.
- Processed 107 Centennial space requests compared to 81 in the prior year, a 32% increase.
- Conducted 30 activation events on Centennial Campus with hundreds in attendance at most events.
- Visit Centennial website saw a 76% increase in monthly searches.
- Lake Raleigh website saw a 43% increase in monthly searches

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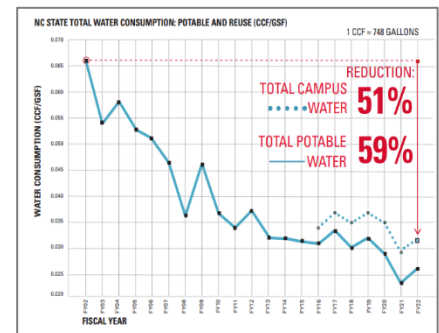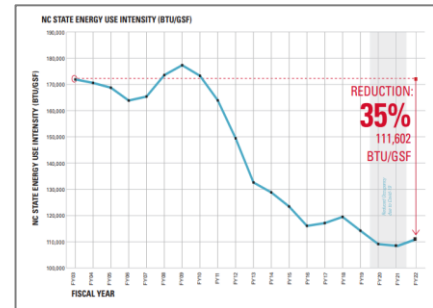
Administration and Finances
- 85,000+ PeopleSoft and job data transactions processed by UHR.
- 96% benefits enrollment rate for 2023.
- 7000 faculty, staff and student employee records processed to confirm eligibility for the new covid-19 booster leave (joint EMMC/UHR effort).
- 2500 employees attended 160+ Learning and Organizational Development classes (mostly focused on management).
- University Payroll managed payment of monthly wages to over 11,200 employees and biweekly payment of wages to over 15,500 temporary, student and graduate student employees.
- University Payroll issued over 26,00 W-2s, nearly 750 1042s, nearly 2000 10-99-NECs and over 1000 1099-MISCs.
- Reviewed and issued nearly 5000 vouchers totaling $28.9M for tax liability compliance.
- Managed $560M in student billings.
- Contracts and Grants managed 5400 active projects, processed over $10M in monthly drawdowns and managed approximately 570 monthly invoices averaging $25M.
- Procurement & Business Services Card Services (PCard, vPay, Fleet Card) processed nearly 357,000 transactions amounting to nearly $173M.
- Over 71,000 purchase orders were placed through MarketPlace, with a spend of $59.6M.

- Procurement processed 3600 purchase orders totaling $403M and HUB spend over $11.5M.
- Accounts Payable processed over 113,000 transactions last year, totaling over $615M.
- FAI processed 60,844 gifts last year, totaling $112M+.
- 400 Gift Agreements completed.
- Investable assets total approximately $2.5B.

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Employee Accolades and Accomplishments

- NC State recognized as #2 best employer in the State of North Carolina, by Forbes.
- NC State awarded a gold rating from the Association for the Advancement of Sustainability in Higher Education, for sustainability programming and performance, placing NC State in the top third of the nearly 250 schools with Sustainability, Tracking, Assessment and Rating Systems (STARS) ratings.
- Procurement & Business Services - Card Services team was awarded the 2023 Transformational Award of Excellence by Bank of America for their card services contributions to banking and disbursements innovation.
- Campus Safety, Health and Environmental Management Association (CSHEMA) - Innovation Award for Process Improvement - recognized EMMC and Athletics efforts for Game Day Operations
- Campus Safety, Health and Environmental Management Association (CSHEMA) - Marketing Campaign Award - recognized EMMC and UCOMM emergency preparedness and media efforts.
- Food Management Magazine - 25 College Power Players of the South - recognized NC State Dining's efforts to expand allergy-free foods, implementation of TxtandTell, and expansion of dining hall services.
- National Association of College and University Food Services - Southern Region Culinary Challenge - NC State Dining Chef awarded silver medal.
- Lonnie Poole Golf Course rankings continued to increase.
    - #1 Public Golf Course in Raleigh, four years in a row,
    - #2 Public Golf Course in the Triangle Area, up from #3,
    - #9 Best Collegiate Golf Courses in the US.
- 20 UHR employees completed Lean Six Sigma Green Belt training, and three completed Black Belt training (of these, four earned Green Belt certifications and one earned Black Belt certification), gaining standardized, professional training necessary to drive HR improvements, project management and efforts to enhance workplace culture.
- Three Facilities employees completed the WakeWorks Apprenticeship program, strengthening the talent pipeline.
- Subject Matter Experts presented at national conferences, served in leadership roles and as board members for national associations.
    - CUPA-HR (presentations)
    - National Association of College & University Food Services (presentations)
    - International Facility Management Association, Hospitality Council (presentations)
    - Parking & Mobility Magazine (publications).
    - Association of Talent Development (President, local chapter).
    - University Surplus Property Association (President).
    - Bank of America Card Product (Customer Advisory Board)
    - Amazon Business (Customer Advisory Board)
    - PaymentWorks (Customer Advisory Board)
    - Flywire (Advisory Board)

- Six outstanding OFA employees were recognized as OFA 2023 Awards for Excellence recipients, from a pool of 28 nominees. These six advanced to NC State's 2023 Awards for Excellence, of which five were awarded the NC State distinction and will advance to the Governor's Award for Excellence program.
    - Bill Carlson, Materials Support (NC State award winner)
    - Steve Johnson, Facilities (NC State award winner)
    - Connor Jones, Transportation (NC State award winner)
    - Jeffrey Luz, Construction Services (NC State award winner)
    - Vince Rogers, Materials Support (NC State award winner)
   - Annaka Sikkink, Campus Enterprises

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Spotlight on Divisions

Budget and Resource Management

Budget and Resource Management led the implementation of the new Executive Budget Resources Dashboard, providing senior leadership with comprehensive budget data and visual analytics in support of strategic budget planning. Incorporating new technology such as SharePoint, Microsoft Power BI, SAS VA, Tableau, etc., the new executive dashboard is quickly serving as an impactful, strategic tool for senior leaders, providing business intelligence across units, funding sources and priorities.

Campus Enterprises

Campus Enterprises saw a solid year, with record meal plan and dining activity. Meal plans were structured to encourage greater patronage of traditional all-you-care-to-eat dining halls, resulting in these locations serving a record 2.1 million meals. In total, NC State Dining served 4.1 million meals last year, a 9% increase over 2022-23. CE successfully managed sustained enrollment growth from back-to-back record freshman class sizes, which both increased revenues and operational pressures. Food costs rose 25%, from $12.6M in 2021-22 to $16.8M in 2022-23, due to higher patronage, investment in the customer experience and high food inflation. Inflationary pressures on wages and cost of goods cut into margins, but were partially offset by revenues resulting in reduced but concrete fiscal contributions to the division's operating cash position and capital reserves which will be critical to the future construction of new dining facilities under the Physical Master Plan. Campus Enterprises, in partnership with the University Controller's Office, has fully transitioned its accounting activity to Peoplesoft, with NC State Dining and NC State Stores processing all AP and AR activities through university financial services. This enables CE to generate P&L and other financial management data within the university's financial reporting systems. All imprest accounts have been closed, and data from shadow accounting software has been archived.
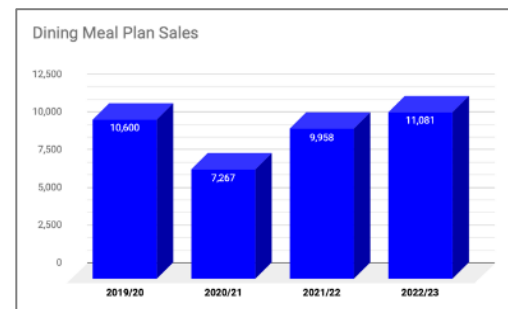
Ever-focused on employee recruitment, retention and career progression, Campus Enterprises continued to strengthen its new workforce analysis capabilities, staffing matrix and Professional Advancement in CE (PACE) programs. Campus Enterprises is closer to full employment in permanent employees than years past, however student and temporary positions remain far below pre-pandemic levels, even as increased starting pay and retention bonuses have been implemented. CE labor market strategies include pivoting temp roles to permanent positions, working with a temp staffing agency, and exploring a Senior Community Service Employment Program (SCSEP) with community partners. Two new employee engagement programs this year included a quarterly 'All Supervisors' Forum' to openly share matters unique to all supervisory employees; and the 'Good Idea Fund (GIF)' targeting operational improvements as proposed by any employee throughout the organization.

Environmental Health and Public Safety

Environmental Health and Public Safety continued its efforts to build proactive, collaborative working relationships with members of the university community to promote a culture of safety and to minimize risk. UPD worked directly with students to build rapport and transparency, completing nearly 1000 safety programs/community engagement events. Risk Assessment conducted training for 8700 participants primarily focused on workplace safety and mental health; and worked with 200 youth programs and partners. EHS established a new laboratory inspection group, implemented new software to track corrective actions and compliance, and took formal steps to embed EHS staff across safety committees.

SAT completed a new 10-year Security Master Plan, Proactively Protecting the Pack, which serves as a best practice template for UNC institutions and public agencies across the state; and completed 58 agreements and over 15,000 service tickets over the past year, to upgrade various security components across campus. EMMC re-envisioned Pack Planning to incorporate new IT concerns (cyber hacking, equipment/infrastructure failure) and new flexible and remote work policies; and facilitated a new campus events registration portal and comprehensive risk assessment process involving Campus Enterprises, DASA, UPD, UCOMM and others.

'Hot Topics', a new, monthly e-newsletter from Insurance and Risk Management, served to inform campus constituents about insurance and risk matters. The new, web-based ORIGAMI insurance portal to collect policy and claims information greatly eased data collection and reporting tasks associated with the UNC System's 'all risk' insurance mandate. Transportation reduced the bus fleet and redesigned bus routes and schedules to mitigate bus driver shortages and to ensure on-time performance amidst campus road closures and significant detours, using its website and apps to keep riders informed of changing bus schedules and routes.

Facilities

Facilities reset its 800-employee organization focused on a Plan-Build-Maintain theme, to better serve its broad and diverse customer base and to eliminate redundancies and inefficient internal processes. The effort took nearly a year to ensure a properly positioned workforce within appropriate functional units, and establishment of pathways to realign core processes. A new leadership team was established, aligned with the Plan-Build-Maintain approach:

- Lisa Johnson - Assistant Vice Chancellor for Campus Planning and Strategic Investment
- Cameron Smith - Assistant Vice Chancellor for Design and Construction
- Allen Boyette - Assistant Vice Chancellor for Campus Operations and Maintenance
- Rachel Patrick (starting July 2023) - Assistant Vice Chancellor for Business Operations

Facilities was committed to executing its mission of creating and preserving the physical campus in support of the university's mission - completing over 8100 work orders, processing 600+ facility modification requests, and advancing 70 capital projects valued at nearly $945M (includes $180M Integrative Sciences Building, $58.8M Electrical Distribution System Upgrade and $47M Greek Village Townhomes and Apartments) while continuing to face challenges posed by an uncertain and tight labor market, and adverse effects of inflation on purchasing power. Student-facing sustainability programming continued to expand, providing 20 student interns and 30 student sustainability stewards with experiential learning, career-building and leadership opportunities throughout the year, via Campus as a Classroom and Sustainability Stewards programs.
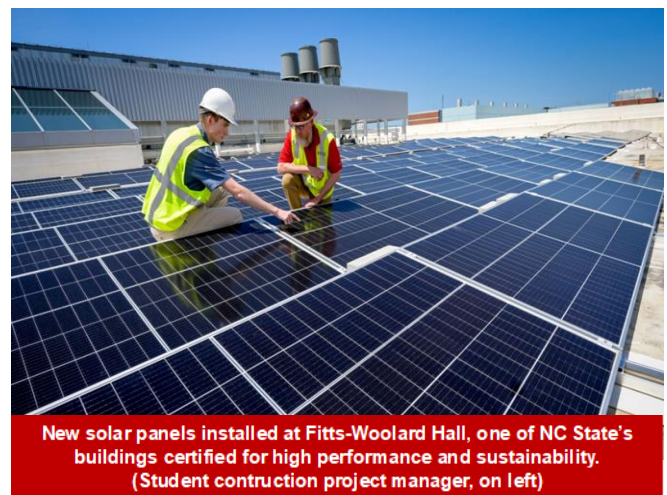
New solar panels installed at Fitts-Woolard Hall, one of NC State's buildings certified for high performance and sustainability. (Student contruction project manager, on left)

Finance

Finance filled three top roles this year, with the hiring of the new Associate Vice Chancellor for Finance and University Treasurer, Dana Harris, and new University Controller, Fran Lawrence. Both senior leaders bring decades of experience managing compliance-oriented financial services across billion-dollar enterprises. Additionally, Chris Ip, NC State's first, dedicated Chief Investment Officer, was hired to lead the Office of Investments within Foundations Accounting and Investments.

The Finance Division continued its efforts to improve workflow, internal controls and fraud prevention measures via digital transformation efforts. Audited financial statements and form 990's were filed timely with no findings for all ten entities managed by Foundations Accounting and Investments. And the University Controller's Office received an unqualified audit opinion with no audit findings on audited financial statements. Foundations Accounting and Investments overhauled its website, securing sensitive data behind the university's firewall. The University Cashier's Office implemented Flywire's new electronic 529 payment system to reduce risk of delayed or lost tuition checks; and led cashless efforts to reduce administrative costs and safety concerns associated with cash collections on campus. Outreach efforts continued, via monthly Business Connections meetings to provide financial updates, website enhancements including the provision of e-manuals, a new Finance Division e-newsletter, continued upgrades to the Finance Division Knowledge Base and continued enhancements to the Learning Management program via the new Business Officer Academy.

Real Estate and Development

Real Estate and Development saw another year of transformative growth for the office and its provision of services to the university community. Several initiatives achieved key milestones, most notably the commencement of permit filings by the developer for the innovation district development. Additionally, several long-term projects moved forward from planning/strategy to active implementation, including:

- Receipt Supported Building Portfolio Restructuring,
- University Towers lease and acquisition,
- Resolution of land boundaries and project plans at North Shore.

Installation of The Corner on Centennial Campus expanded activation programming across the NC State community and with regional and neighboring partners. Additional Centennial activation events included the Live@Lake Raleigh concert series in partnership with NC State Live, Centennial Social Hour, food truck rodeos, lunch yoga, a new, storyteller-style performance series, 'Artist Notes', in partnership with local radio stations 95.7 THAT STATION. The North Shore project has achieved several milestones including the completion of the first condominium building, establishment of regular stakeholder communications through a web presence for the project, and an analysis and action plan for repair/stabilization and completion of the roadways within the project.

University Human Resources

University Human Resources continued efforts to transform the HR function at NC State, by creating more best-in-class programs for university employees while enhancing existing offerings - with the goal to ensure that NC State continues to attract world-class talent and to retain our gifted workforce. Over the past fiscal year, UHR worked with university partners to successfully:

- Launch the Wolfpack Performance Program, an electronic performance management system to replace the paper-based process.
- Establish the university's Employee Value Proposition.
- Establish a Project Management Office to bring structure and clarity to project management in UHR. Representatives from across the NC State human resources community contributed to this team.
- Implement a new customer service e-tool, HRNow, to provide a virtual agent and online knowledge base to assist employees in obtaining timely, accurate and single-sourced answers to common HR questions.

- Celebrate the tenth anniversary of the Onboarding Center, which has met with over 18,000 employees, hosted more than 800 orientation sessions and conducted hundreds of campus tours to welcome new employees.
- To bolster our recruitment efforts across the university, hiring two new recruitment specialists with skills to source talent in hard-to-fill positions (in progress).

To better recognize and serve NC State employees throughout the year, and to promote engagement and attendance, UHR introduced new events and retooled standing events:

- Hosted our first Red and White Fest: An Employee Celebration, coinciding with Red and White Week (Nov 2022). Nearly 2000 faculty and staff attended the event at Miller Field.
- Facilitated our first Our Extraordinary Pack Employee Appreciation Week (May 2023), with daily on-campus and virtual events, and media campaign.
- Hosted NC State's 2023 Awards for Excellence, recognizing 12 non-faculty employees for outstanding accomplishments and contributions, who will advance to the Governor's Award for Excellence. (Six NC State employees have won the Governor's Award for Excellence since 2015). Implemented a dedicated webpage to promote college and units awards for excellence programming, and to recognize 278 nominees this year.
- Retooled standing events including Service Awards ceremonies, the Quarter Century Club breakfasts, and Ready to Retire benefits sessions.
- Partnered with Wellness and Recreation and the Faculty and Staff Assistance Program (FASAP) to provide employees with mental health resources, including webinars, virtual wellness activities and free yoga classes in recognition of Mental Health Month (May 2023). Nearly 500 employees attended the four mental health webinars.

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