

2014-15 ACCOMPLISHMENTS**Charles D. Leffler, Vice Chancellor for Finance and Administration**

During fiscal year 2014-15, the Office for Finance and Administration (F&A) continued its focus on resource alignment and risk mitigation to support **strategic management and stewardship of resources; exceptional service and support** to students, faculty, staff and the university-at-large; **community and connectivity; physical environment and strategic development.**

Resource Management and Efficiency

1. **Strategic Resource Management:** Following Chancellor's approval, **charged implementation teams with the first set of recommendations**, which included Common Internal Allocation Methodology for Enrollment-related Academic Funds; Differential/Premium Tuition and Fees; Growth of Doctoral Education; and Internal Transfer. The **second set of recommendations** was submitted for review and implementation teams will be charged end of June 2015.
2. **Budget Restructuring Task Force** focused on charge to develop one consistent internal resource allocation methodology for enrollment change-related academic funds. In April 2015, four options were presented to the Deans and final recommendations are anticipated to be given to an implementation team in June/July 2015.
3. **Hofmann Forest:** Restart of monetization effort with selection of Conservation Fund.
4. **Administrative Process Review Committee:** Chaired by Rich Gould and Charles Cansler, committee working on 74 projects, including 10 assigned from Strategic Resource Management Working Group. During next few months, committee wrapping up projects and will go on hiatus until new Vice Chancellor starts.

Community and Connectivity

1. **Blue Ridge Corridor:** Participated in the development of **Blue Ridge Corridor Master Plan** and provided leadership and support to **Blue Ridge Corridor Alliance**. Blue Ridge Corridor Alliance formally became incorporated and a 501(c)3. Member contributions resulted in a 3:1 match from Raleigh and a total budget of over \$50,000. Planning is underway to achieve a BID boundary and petition for 2015.
2. **Hillsborough Street:** Provided leadership to **Hillsborough Street Community Service Corporation** for development, with coming focus on street improvements bond - phase two. Hillsborough Square development designs are in final stages and the purchase of the site and ground breaking is expected in the summer of 2015. A parking needs and assets study is underway with City of Raleigh and Hillsborough St. BID. Neighborhood support and

engagement with Hillsborough St. developments and long-range visioning study is at an all-time high.

3. **Southwest Raleigh Neighborhood:** Participated in Uncovering Southwest Raleigh project, consisting of visioning futures, developing strategies and developing community resource guides to reinvigorate community.

Campus Enterprises

1. **Student Support:** More than **\$2.8 million** provided to student-related program and scholarships. Expanded student employment opportunities provide jobs for 760 students. Working with Registration and Records to use space in Talley Student Union and Witherspoon Student Center for classes.
2. **Rave Event Services:** Successfully merged multiple services – the 2 primary being room reservations and catering. Collaborated with ARTS NC State to reserve Stewart Theatre centrally and implemented central reservation process for Duke Energy Hall at Hunt Library. Anticipate centralizing space reservations for space at Carol Johnson Poole Clubhouse in Summer 2015.
3. **Lonnie Poole Golf Course and Carol Johnson Poole Clubhouse:** Bunker Repairs and Comfort Stations completed. Hosted 2014 NCAA Men's Golf Regional to rave reviews and will host 2015 NCAA Women's Regional and 2018 NCAA Men's Golf Regional. Assumed operation of the Carol Poole Clubhouse Food and Beverage program.
4. **Talley Student Union:** The Talley Student Union renovation and addition project is nearing completion. Phase II of Talley opened on May 8. Upfit work being completed for Stewart Theatre, Starbucks, One Card Office, and 1887 Bistro but anticipate those areas to be open August 2015. The expanded Bookstore and Starbucks opened in June.
5. **State Club and Alumni Center:** The State Club was remodeled and completed, and the Alumni Center HVAC project has been scheduled.
6. **Advancing Technology:** Developed and implemented mobile products so patrons can transact via mobile devices, monitor transactions and manage accounts online. Bookstore's new electronic shelf tags will provide store the opportunity to change prices instantaneously and save labor from paper tag replacement. Upgraded campus ID card system and Micros Point of Sale system to enhance performance and comply with data security and PCI requirements.
7. Associate Vice Chancellor Dan Adams selected for National Association of College Auxiliary Services Education Foundation Board.
8. University Dining hosted the 2015 NACUFS regional conference.

Centennial Campus Development

1. **Centennial Biomedical Campus Flex Building:** Programming is completed for CVM spaces. Ground lease negotiations are in progress. Anticipated 2016 completion.
2. **Conference Center/Hotel:** Groundbreaking held on April 22, 2015. Grading activities will begin soon.
3. **North Shore Residential:** Will begin construction June 2016, pending review and approval of loan documents.
4. **Completed Alliance I**
5. **Portfolio management:** Completed interim report for comprehensive leasing activity. Working with Real Estate Office on next steps which may include a process/procedure review.
6. **Center for Technology and Innovation (Textiles):** Completed Development Feasibility Study in October 2015 and building plans have been approved. Construction will begin once ground lease negotiations finalized. Land swap between State of NC and Endowment Fund almost complete.
7. **Tenant Building Improvements:** Completed Partners I HVAC project, Research III renovation, and Research II HVAC is underway.
8. **Partner Leasing and Upfits:** Space leased to corporate partners increased from 36 to 39%. Completed 45,600 SF of tenant upfits at estimated cost of \$5 million.
9. **Centennial Campus 30th Anniversary:** Held 30th anniversary event commemorating Centennial Campus.

Environmental Health & Public Safety

1. **Security Master Plan and Related Assessments:** The Security Master Plan was adopted by the Executive Officers and posted on the SAT and EHPS website. The Plan was presented to a meeting of UNC Police Chiefs. Implementation of the plan is underway. A significant number of recommendations from the Plan have been implemented including: security is recognized as a guiding principal in the Physical Master Plan, security assessments of 60 buildings have been completed, and funding has been made available to support key SAT hires.
2. **Ongoing Safety and Monitoring:** Completed 933 safety plans, addition of 57 monitored doors, 82 card readers and 239 cameras; inspection of more than 1,500 labs; review of more than 100 biosafety protocols; inspection of more than 63,000 fire extinguishers; testing of more than 400 fume hoods. More than 950 chemical orders flagged for review in Marketplace. Residence Hall card/cameras will complete a year early.
3. **Transportation:** Evaluated and improved route efficiency, June Wolfline ridership estimated to exceed 3 million for the first time.

4. **Care Team:** Worked collaboratively with DASA to establish Care team and more efficient behavior assessment team processes. Updated SOPs.
5. **Safety Trainings:** Provided targeted, strategic safety training for students using chemicals, radioactive materials, lasers, biological agents and laboratory equipment. Programs continue to be oversubscribed. Rape Aggression Defense and Citizens Police Academy are the two most popular classes and filled to capacity.
6. **Risk Management:** Led risk management for units – each AVC developed and reviewed their divisions' respective risks, and EH&PS completed risk mitigation strategies for top 10 risks, In process of rolling out modified version of UC California ERM program to rank risks.

Facilities and Campus Plan

1. **Energy and Sustainability:** Phytotron Energy Conservation project successfully completed September 2014. LEED certifications being pursued for Wolf Ridge, Poole Clubhouse, Talley, Reynolds, Gregg Museum and Indoor Practice Facility projects. Energy reduction has reached 29% against a 2003 baseline towards a 30% goal for 2015. **Saved \$275,000** in utility costs via **winter break energy setbacks**. **Energy Management recognized by State Energy Office** for the Utility Savings Institute.
2. **Improved Data:** Completed GIS/Mapping of Centennial Campus utilities; improved online campus map; completed F&A survey tool in FM:Interact to assist Contracts & Grants; small equipment inventory (<\$5000) entered into AiM database.
3. **Planning:** Updated 6-year Biennial Capital Plan. Dedicated significant time to preparing for smooth transition from UNC-GA's current capital budgeting software system to Interscope+, which begins implementation phase September 1, 2015. Closed 25 capital items to minimize number of projects transferred to new system. Completed Lake Wheeler Master Plan.
4. **Major Projects:**
 - **Engineering Building - Oval:** Preliminary program developed, funding strategy in progress.
 - **Gregg Museum:** Design to be completed Fall 2014.
 - **Reynolds Coliseum:** Design/Development underway, funding plan executed with WPC.
 - Completed College of Textiles 2nd floor renovation, Graduate School relocation, Cox Scale-up Classroom, MRC cleanroom renovations.
5. **Space Planning and Management:** Analyzed and met with COD, PCOM, CNR and CED to review accuracy for office and research space. Initiated process of tagging people to office and lab space in MyPack Portal. Coordinated space improvements for CFEP hires.
6. **Space Refurbishment:** Repurposed 57,000 ASF in completed projects, and studying additional 13,000 ASF.

Finance & Resource Management

1. **Fiscal Integrity:** Received **clean audit for 14th consecutive year**. Consistent and timely implementation and reporting of **UNC-FIT KPIs** and unique information requests from the Office of State Budget & Management, Legislative Fiscal Research Division and UNC General Administration.
2. **Facilities & Administrative Proposal preparation:** Analyze space, service center use, equipment use, and other information necessary for preparation and submission of the F&A Proposal on track for December 2015.
3. **Campus Training:** Developed and presented 25 training sessions on Uniform Guidance (UG) to various campus departments and University personnel. Contracts & Grants updated the On-line Summer Salary Training Tutorial for faculty (487 completed) and created a similar tutorial for administrators to replace the classroom training (124 completed).
4. **People Soft Financials Query Tool:** The Budget Office created easy-to-use query for campus to use in reviewing and identifying budget cleanup in certain categories (e.g., revenue, financial aid), and provided documentation and training.
5. **Position Control Application:** Budget Office worked extensively with OIT to rewrite, and it provides easy way to pull position budget data from the HR System and salary budget data from the Financial System. It combines the data into reports to assist with managing personnel costs and associated funding / budget. It has also been enhanced to include new high-level summary reports.
6. **Wolfpack Reporting System:** The WRS Rewrite Committee was formed (with representatives from EAS, the Budget Office, Contracts & Grants, and the College of Textiles) to address the current performance issues related to running reports and using the drill downs, to consider removing reports no longer being used, and to explore future enhancements and reports.
7. **Finance & Administration Dashboard:** Updated site architecture, trend data adjusted to show state appropriated receipts separately in 16030 state budget code and federal receipts separately in 16031 and 16032, explanatory language added, crosswalks to the University's Financial Statements and new UNC GA Key Performance Indicators were added.

Human Resources

1. **Affordable Care Act:** Implemented the KABA time-collection system campus-wide. More than 350 employees would become newly-eligible for ACA coverage. Of those, all were offered coverage, and approximately 30 employees enrolled. Tracking requirements are continuous. Worked with OIT to design, develop specifications and test technical changes needed to comply.

2. **KABA Time Collection:** Implemented KABA campus-wide and provided extensive training and user materials to ensure fully ACA-capable timekeeping and payroll for temporary employees and student workers. All existing temporary and student workers were converted to KABA as of September 30, 2014, in time for open enrollment and are now automatically enrolled.
3. **Strategic Compensation Philosophy:** Analyzed EPA Professional (Non-faculty) salaries campus-wide compared to CUPA-HR market data, where available, and provided Vice Chancellors/Deans/HR Leads with comprehensive spreadsheet of employee's salaries compared to market that was used to support university's 2014-15 EPA discretionary increase process. Compensation reports for SPA employees were created but not disseminated due to salary restrictions that mandated a 1% across-the-board legislative adjustment. Completed salary analyses and proposed 2015-2016 salary ranges for SAAO II positions; ranges approved by BOT at its April 2015 meeting. Continue to discuss opportunity for dedicated strategic compensation planning activities in collaboration with Deans Council.
4. **Compliance:** Developed online self-identification tools to capture updated employee voluntary self-reports on veteran status and disability status and revised language in applications and applicant profiles in PeopleAdmin to be consistent with new federal requirements. Researched best practices and recruitment resources and developed "supervisor tool box" for hiring officials to support and expand employment recruitment efforts of veterans and individuals with disabilities.
5. **Professional Development:** The 2013-14 pilot program was fully rolled out to campus and implemented during 2014-15 as "Compass Online Learning System powered by Skillsoft" and launched July 1, 2014. Currently 422 users who have completed 1,725 courses.
6. **Talent & Organization Solutions:** Fully implemented new business model to enhance HR's service delivery for position creation, classification, recruitment, selection, compensation, and organization design. New model focuses on providing thorough "current state" data, consultation, guidance, and options for solutions to issues related to workforce recruitment, retention, and diversity.
7. **Hiring, Adjustments and Retirement:** Processed 68,181 applications for regular employment. Adjusted salary (other than LI) for more than 600 positions, with a 100% success rate of salary adjustment requests submitted to UNC-GA for approval. Placed 967 temporary employees, with UNC-CH business up 16%.
8. **Workers Compensation:** Benefits Leave Administration handled most workers compensation claims in-house, achieving better medical outcomes, which resulted in employees returning to work sooner. Fewer injured employees retained attorneys as compared to previous years.

9. **Additional Compensation:** Designed and launched Additional Compensation Application in PeopleSoft HR System effective November 2014. Fully aligns with Additional Compensation regulation, provides systematic process tracking and approval workflow. Since its launch, EPA Administration processed more than 2,300 additional compensation actions.
10. **Child Care:** Issued RFP and executed contract with Bright Horizons, successful bidder.
11. Associate Vice Chancellor for Human Resources Barb Carroll is CUPA-HR Chair.

Treasurer's Office

1. **Financial Asset Management:** Selected financial advisor. Built initial forecast model for university, and will test /refine over next fiscal year. Initial investments of \$122 million were made on July 3, 2014 for NC State ITF. Additions were \$51.4 million with investment return of 1.21 as of 3-31-15 compared to index of 1.15%. 3% loss reserve was established for all ITF Participants to help buffer changes in the NAV. NCSIF performance return of 15.7% (2014) and 10% (2015).
2. **Analysis and Support:** Assisted with LaPaz, Hofmann Forest and capital campaign analysis and support.
3. **Student One-Stop Shop:** Completed triage/call center. Began work on virtual presence, hired web designer and Student Service Center web site work has begun.
4. **Real Estate:** Over 116 leases and MOU's were processed in the past year. Over 20 Easements, Encroachments, Rights of Way and other agreements were processed in the past year. 2 Timber Bids were held last year resulting in approximately \$80,000 of income and clearing 6 acres for agricultural expansion acreage.
5. **Purchasing:** Added MarketPlace supplier catalogs, resulting in reduction in AP voucher processing (over 800 vouchers), additional contract discount savings of over \$25,000, and more than \$12,000 added PCard rebate. PCard augmented reporting and shared with campus for college/division business office PCard compliance monitoring.
6. **Major Projects:** Paid off loans for Lonnie Poole Golf Course and Chancellor's Residence this fiscal year. Received significant pledges for Gregg Museum to begin construction.
7. **Capital Campaign Assistance:** Work done to categorize endowments by purpose at a more granular level, enabling more detailed reporting used for a baseline for start of campaign.

University Business Operations

1. **CALS Business Center:** UBO collaboratively engaged in **Phase I Business Center implementation**. Completed ScottMadden CALS Business Center Study in February 2014. Current work includes organization and staffing, process redesign and documentation, budgetary best practices, and facilities and technology needs assessment.
2. **Travel:** In conjunction with Controller's Office, reviewing RFP responses for Online Travel Tool, which will automate booking of airline tickets to allow negotiated savings with the

airlines, automate payment, eliminate manual processes and allow university to manage emergency recalls of personnel and students.

3. **Onboarding:** Onboarding expanded campus-wide and is working on Inboarding (transfer) support and tools for campus.
4. **F&A/OIT Shared Services:** Initiated strategy sessions to lay out process for **Administrative Business Center**. Steering team and working groups to be named in July 2015.
5. **Service Now Implementation:** Implemented new case management system to improve communications and tracking of customer requests in CALS Business Center, with phased roll-out to campus planned.