**Overview**

In October 2016 Finance and Administration (F&A) released its plan for the *Right Serving Right Sizing (RSRS)* review initiated by President Horvath. F&A’s plan included the following sections: data gathering, soliciting feedback and best practices, a review process, communication and participation. The following report provides the university community a summary of the activities F&A took as part of the *RSRS* process. The report includes details of the suggestions collected and the recommended actions the leadership of F&A propose the university leadership to consider for implementation.

**Data Gathering**

Tabs 7-10 on the spreadsheet entitled Finance and Administration *RSRS* Final Report – Additional Information contain some data regarding F&A. The information includes F&A’s State Operating and DIFR budgets over the past ten years, F&A’s FTE’s over the past ten years, and FSA’s contributions and support of the university over the past ten years. There is also a table showing the gross square footage added to the campus in the past ten years.

**Soliciting Feedback and Best Practices**

On December 2, 2016 an email was sent to all the students, faculty and staff introducing the Google Doc Survey. A copy of the survey can be viewed at [**https://goo.gl/forms/D4nbdzRgFGdDUS2l2**](https://goo.gl/forms/D4nbdzRgFGdDUS2l2) A second email was sent as a reminder on December 14, 2016. Hard copies of the surveys were also available. The response to the survey was significant. More than 150 surveys were returned from faculty, staff and students. The suggestions were initially categorized by function: Auxiliary Services, Facilities, Finance, Human Resources, Revenue Generation, and University Services. A spreadsheet providing the survey responses was developed for each functional area. (See first six tabs on the spreadsheet entitled Finance and Administration’s RSRS Final Report- Additional Information)

**Review Process**

Six review teams were established to review the suggestions and separate them into one of three categories. Each review team was chaired by a member of the F&A leadership team. Review Teams included representatives from the university community including faculty, staff and students. Union represented employees and members of the University Senate also participated in the review teams. See Exhibit 1 for the membership of each Review Team.

The Review Teams discussed the benefits and challenges of each suggestion. In some cases one Team decided that a suggestion should be forwarded to a different Team for consideration. The Review Teams also found that multiple respondents made the same or very similar suggestions. In those situations, the Review Teams considered the suggestions as one topic. The final task for the Review Teams was to make one of three recommendations for each suggestion: implement as soon as possible, additional information needed, or hold for future consideration.

The next step in the process was for the chair of each Review Team to present the team’s recommendations to the *RSRS* Decision Team. See Exhibit 1 for the membership of the Decision Team. A separate meeting was scheduled for each team chair to present the suggestion, the reason for the suggestion, the benefit derived, the challenges to implementation and the Review Team’s recommendation. Decision Team members had the opportunity to ask questions, provide different perspectives, challenge or defend the recommendations. Ultimately the Decision Team either agreed with the Review Team’s recommendation or revised it. The Decision Team also discussed which of the recommendations might need additional actions/approvals such as cooperation with another division, approval by Cabinet, need to invoke PEPRE, etc. before a recommendation could be implemented.

**Communication**

The F&A Plan and the Interim Report were shared with the university community. Progress reports were shared at labor management, Cabinet, F&A staff, and College Council meetings.

The Final Report is being shared with the university community.

**Participation**

The goal of the F&A *RSRS* process was to include representatives from all constituent groups, faculty, staff, students, governance, collective bargaining units, and if possible, community leaders to participate. The following are some participation statistics:

* 155 Surveys completed
	+ 39 Faculty
	+ 13 Students
	+ 102 Staff
	+ 6 “Others”
* 37 Served on Review Teams
	+ 5 Faculty
	+ 24 Staff
	+ 4 Students
	+ 25 Union Represented Employees
	+ 4 Governance Representatives

**Suggestions Recommended for Implement As Soon As Possible**

The Review and Decision Teams recommended that the following suggestions should be considered for implementation as soon as possible. Some are more far reaching than others but they all are designed to increase revenue, reduce costs or help the university operate more efficiently and/or effectively. In some cases additional analysis will need to be conducted in order to calculate the impact for each of these suggestions. In addition, there may be a need for further discussions with other university leaders to partner in the implementation. The following table is designed to provide a short description of the suggestions recommended for immediate implementation. Further information is provided in the spreadsheets prepared by the Review Teams (See first six tabs on the spreadsheet entitled Finance and Administration’s RSRS Final Report - Additional Information)

|  |  |
| --- | --- |
| **Function** | **Recommended Suggestion** |
| Auxiliary Services |  |
|  | Use Cranston Marche as a restaurant on weekends and during college breaks |
|  | Advertise the College Lodge more readily and make renting it more affordable |
| Facilities |  |
|  | Conduct individual job studies of positions to ensure efficient workflow. |
|  | Investigate opportunities for solar/wind energy |
|  | Change the way trash and recyclables are collected |
|  | Increase installation of motion sensor lights |
|  | Assign management of all capital projects Facilities Planning  |
|  | Reduce the work of maintaining flower beds by reducing their size and plant only perennials  |
|  | Shut down Houghton Hall fume hoods |
|  |  |
| Finance |  |
|  | Create one recharge account (for copying, postage etc.) per division |
|  | Eliminate the practice of F&A paying shipping costs for business cards, stationery and envelope orders from Alfred |
|  |  |
| Human Resources |  |
|  | Change hours of operation from 8:30am to 5:00pm to a window of 7:00am to 6:00pm |
|  | Incentivize staff to “break-in-place” especially Facilities Services staff |
|  | Modify the Change of Status system so it can be used to complete performance programs and evaluations |
|  | Streamline the SEFA process |
|  |  |
| Revenue Generation |  |
|  | Develop “Fredonia Experience” concept where children and adults can attend special classes and programs; this could be a single event or, a seminar, or multi-day events. This could include lodging and food options. May include extended learning classes in pottery, woodworking, and other crafts at the workrooms in the RAC. Charge appropriate fees to members of the university and community.  |
|  | Open the campus to more community events |
|  | Market additional university space to external groups for various events such as weddings, family reunions, retreats etc. |
|  | Host more special community events on campus such as Starry Night at Science Building |
|  | Use facilities which are underutilized or not being used at all such as Erie Dining Hall, the Townhouses, Hendrix, Igoe, Incubator, etc. to generate revenue, support academic program, support students, bring visitors to campus, use in our recruitment and retention efforts, etc. |
|  | Provided extended learning classes for pottery, woodworking, etc. in the RAC workrooms |
|  |  |
| University Services |  |
|  | Incentivize shared use of printers/copiers/fax machines in units |
|  | Combine the campus mail and copy center operations. Consider including central mailroom for resident students. May require different location. |

**Suggestions that Require Additional Information Before Further Consideration**

The Review and Decision Teams recommended that the following suggestions required further information and discussion before they are considered for implementation. Some may require more extensive review, additional data or consideration of the Board of Directors of associated entities. Regardless of what additional work needs to be completed these are suggestions the F&A Decision team thought warranted additional serious consideration. The following table is designed to provide a short description of these suggestions. Further information is provided in the spreadsheets prepared by the Review Teams (See first six tabs on the spreadsheet entitled Finance and Administration’s RSRS Final Report - Additional Information).

|  |  |
| --- | --- |
| **Functional Area** | **Suggestion** |
|  |  |
| Auxiliary Services |  |
|  | Provide more food options at more reasonable prices and commuters would be more likely to eat on campus |
|  | Reduce food options to prevent waste and reduce cost |
|  | Let a nature conservatory such as the Chautauqua Watershed Conservancy manage the forest area adjacent to the College Lodge |
|  | Sell real estate assets such as the College Lodge and Alumni House and create an unrestricted endowment with the proceeds |
| Facilities |  |
|  | Hire individuals into the SG 6, SUNY Campus Worker title to increase the different types of work the staff members in this title can do. |
|  | Hire more custodial workers |
|  | Enforce restriction on the personal use of university provided cell phones |
|  | Use timeclocks for staff to improve efficiency in record keeping |
|  | Close restrooms on floors 2, 3, 5, 6, and 7 of Maytum Hall  |
| Finance |  |
|  | Start requesting and using vendor discounts |
|  | Automate the classified timesheet review and approval process |
|  | Eliminate the printing of pay stubs if on direct deposit only |
|  | Adopt fully the OSC Travel Guidelines regarding the use of the least expensive mode of travel |
|  |  |
| Human Resources |  |
|  | Change obligation for academic department support staff from 12 months to 10 months |
|  | Cross train Administrative Service Unit (ASU) staff to perform like or similar work in different work locations  |
|  | Eliminate the printing of pay stubs if on direct deposit only  |
|  |  |
| Revenue Generation |  |
|  | Increase the price to park on campus |
|  | Complete a feasibility study regarding a hotel on campus |
|  | Provide additional generating services on campus such as a barber shop |
|  | Use vacant residence halls as summer hostels |
|  | Bring events to the university’s stadium |
|  | Consider purchasing mobile Point of Sale devises |
|  | Implement a special parking fee for students |
|  | Offer employees a room for night at reasonable cost for situations like inclement weather |
|  |  |
| University Services |  |
|  | Use social media for marketing rather than printing materials |
|  | Renegotiate the long distance telephone contract |
|  | Reduce the amount of printing  |
|  | Reduce the amount of postage by sending more email |
|  | Review need for special services such as Park and Ride, courier service, etc. Reduce or eliminate special services such as Park and Ride  |
|  | Conduct cost benefit analysis on state fleet management |

**Summary**

F&A’s *RSRS* process did not uncover any suggestions that will reduce costs or increase revenues for the university by a million dollars. However, there are several suggestions that provide benefits and can be easily implemented. As these recommendations are implemented, the university community will experience the benefits and more ideas will be suggested. Momentum will build and the concept of *Right Serving, Right Sizing* become a continuous improvement process. Employees will become more comfortable with making suggestions and one great suggestion will lead to many more.

**Note of Appreciation**

There are many members of the university who contributed the F&A *RSRS* process and made it successful. I thank all the individuals who: developed the survey; took the time to submit surveys; transformed the surveys into suggestion spreadsheets for each review team; participated on a review team or the decision team; assisted in writing, editing, providing data, etc. to complete this final report. And a huge special heartfelt thanks to each individual who works in Finance and Administration and the Faculty Student Association. I know you are committed to serving everyone in the university community every day in the best way that you can. **You and your efforts are VERY MUCH appreciated!**

EXHIBIT 1

Review and Decision Teams Membership

**REVIEW TEAMS**

Auxiliary Services – Chair: Darin Schulz,

Members: Jefferson Dedrick (Student), Matt Snyder (Staff), Erin Mroczka (Staff), Jim Ivey (Faculty), Kathy Forster (Staff)

 Facilities – Chair: Sarah Laurie,

Members: Markus Kessler (Governance), Kevin Cloos (Staff), Mike Jabot (Faculty), Shannon Moore (Staff), Lindsey Alday (Student), Kellie Sacilowski (Staff)

Finance – Chair: Judy Langworthy

Members: Ted Lee (Faculty), Sue Cortes (Staff), Jennifer Costa (Governance), Sandy Noble (Governance), Sarah Chamberlain (Student)

Human Resources – Chair: Michael Daley

Members: Zach Sweet (Student), Andy Karafa (Faculty), Steve Rieks (Staff), Tracy Collingwood (Staff), Robyn Reger (Staff), Shannon Fisher (Staff), Deb Dibble (Staff)

Revenue Generation – Chair: Chuck Notaro

 Members: Kevin Kearns (Staff), Chuck Cornell (Staff), Chris Zenns (Staff)

University Services – Chair: Terry Tzitzis,

Members: Steve Gromala (Staff), Jen Costa (Governance), Joe Baxter (Staff), Shari Miller (Staff), Shannon Moore (Staff), Todd Proffitt (Faculty),Patty Feraldi (Staff)

**DECISION TEAM**

Decision Team – Chair: Kevin Seitz

Members: Chuck Notaro, Judy Langworthy, Mike Daley, Sarah Laurie, Darin Schultz, Terry Tzitzis