

Indiana State University

**Division of
Finance and Administration**

**Annual Report
2023-24**



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FINANCE AND ADMINISTRATION

ANNUAL REPORT

2023-24

INTRODUCTION

The Division of Finance and Administration comprises approximately 244 staff employees and 61 student employees (excluding bookstore operations) who provide a range of daily services and support to the University community. These employees perform essential tasks such as cleaning, maintenance, and transaction processing, which are critical to the campus's appearance and the provision of essential services to students, employees, and visitors. These services significantly enhance the University's overall atmosphere and integrity.

Finance and Administration handles the business functions of accounting, budgeting, investing, debt management, procurement, facilities management, payroll, risk management, public safety, and human resource management for Indiana State University's colleges, departments, employees, and students. Every effort is made to protect University assets and ensure compliance with all laws, regulations, and business practices. The unit consists of 11 operating departments:

- Bookstore Operations
- Budget and Payroll
- Contracts and Grants
- Environmental Health and Safety
- Capital Planning and Construction
- Campus Facilities Operations and Maintenance
- Financial Accounting and Procurement
- Financial Services
- Human Resources
- Public Safety (Campus Police and Traffic & Parking Services)
- Risk Management

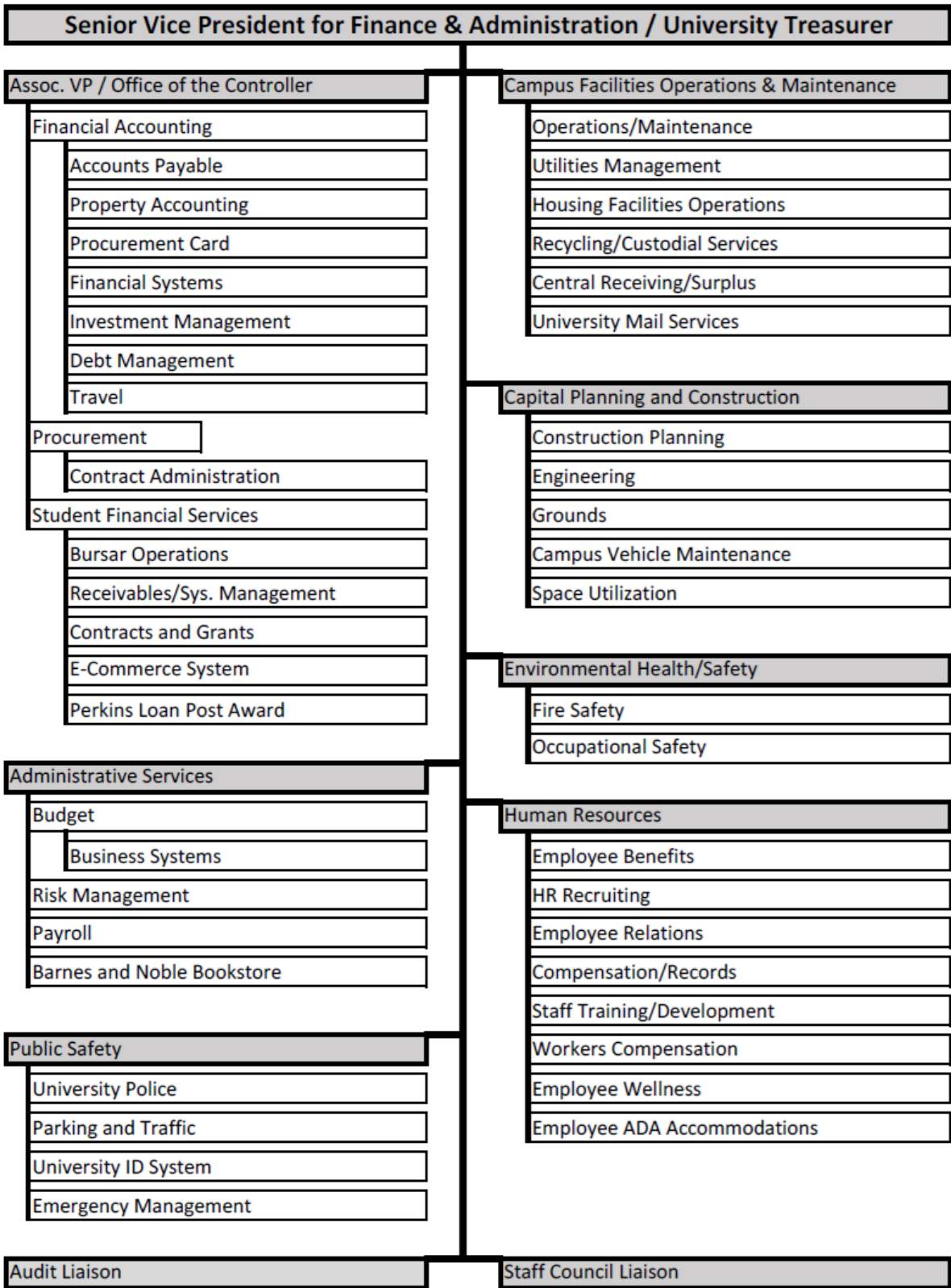
Each department operates with values and principles emphasizing teamwork and integrity, focusing on quality assurance, significantly contributing to Indiana State University.

This annual report aims to inform constituents about the Division of Finance and Administration's contributions to the University. It captures and quantifies significant services and support provided, highlights accomplishments over the past year, and demonstrates resource management.



Diann McKee

Senior Vice President for Finance and Administration / University Treasurer



Effective August 1, 2024

University Statement of Mission, Vision, and Core Values

MISSION

We transform the lives of students through a high-quality education infused with experiential learning, community engagement and career-readiness. Our students succeed within a culture of inclusion and support that provides the skills and knowledge to impact Indiana and beyond.

VISION

We will be the university of choice for students seeking a distinctive, high-quality education highlighted by challenging experiences that prepare our graduates to contribute to the economic vitality and civic and cultural development of their communities and the global society.

CORE VALUES

- **Learning:** We prepare the next generation of leaders and citizens by providing personalized and transformative experiences that lead to success in the classroom and beyond.
- **Discovery:** We nurture intellectual curiosity and growth through the creation of new knowledge and the joy of enhanced human understanding.
- **Engagement:** We collaborate with our local and global communities to create long-term relationships, connectedness with integrity, and a shared sense of pride.
- **Inclusiveness:** We take action to honor the diversity of individuals, ideas and expressions, ensuring they are genuinely recognized, valued, and lived.

OFFICE OF THE SENIOR VICE PRESIDENT FOR FINANCE AND ADMINISTRATION / UNIVERSITY TREASURER

2023-24

The Office of the Senior Vice President for Finance and Administration/University Treasurer is committed to providing quality service and support. It works as an administrative partner with faculty, staff, students, trustees, and governmental officials to fulfill Indiana State University's mission and vision.

The Senior Vice President for Finance and Administration coordinates activities within the division, including Budget and Payroll, Student Financial Services and E-Commerce, Contracts and Grants, Contractual Services (Barnes & Noble and Sodexo), Controller, Facilities Management, Purchasing, Risk Management, Human Resources, Environmental Safety, and Public Safety.

Additional responsibilities include:

- Serving as Chief Financial Officer of the institution.
- Formulating business policies, developing operating procedures, and coordinating business operations.
- Supporting the University President and Government Relations in advancing the University's needs at the state level.
- Developing the biennial state capital and operating request in conjunction with the University President.
- Accounting for and safeguarding University assets.
- Leading the preparation and monitoring of the University budget.
- Improving and maintaining University facilities.
- Developing the Campus Master Plan.
- Managing new construction and facility expansion.
- Overseeing and managing outstanding University debt and issuing new debt.
- Managing the investment of University funds.
- Preparing financial reports as needed by the administration and Board of Trustees.

The office also serves in the following capacities:

- Member of the Finance Committee of the Indiana State University Foundation
- Member of the Audit Committee of the Indiana State University Foundation

Division retirements throughout the year included:

- Associate Vice President-Financial Accounting; Controller's Office; 43 years of service
- Central Heat Plant Manager; Facilities Management; 27 years of service
- Electrician-Special Systems; Facilities Management; 22 years of service
- Administrative Assistant; Facilities Management; 37 years of service
- Grounds Equipment Operator; Facilities Management; 30 years of service
- Custodians (4); Facilities Management; 92 years of service combined
- Custodian; Housing Facilities; 22 years of service

BUDGET AND PAYROLL

2023-24 ACCOMPLISHMENTS

- Processed 51,969 pay events in 2023-24 with a total gross payroll of \$94,570,832.
- Issued 4,025 W-2s in 2024 with 56% being issued through the ISU portal.
- Withheld \$21,097,881 in taxes and timely submitted 42 payments with corresponding federal and state reports.
- Completed 37 wage verifications.
- Processed 119 involuntary wage deductions (child support, wage garnishments, and delinquent tax withholding) resulting in 37 payments to outside agencies.
- Implemented regular monthly UKG training for supervisors and timekeepers.
- Developed and implemented additional auto-notifications and reminders for UKG users.
- Created multiple instructional videos for UKG users.
- Applied 1,117 salary budget increases to full-time benefit eligible faculty and staff positions.
- Processed over 533 capital project invoices & requisitions via check requests, purchase orders and procurement card transactions; approximately \$17M in capital project expense flowed through Plant Fund programs.
- Reviewed and/or updated 1,336 salary budgets due to various position changes such as promotions, new hires, reallocations, transfers, and separations via EPAFs.
- Audited samples from over 790 employee salary records in the University's Salary Book for reporting accuracy.
- Compiled exempt & non-exempt employee FTE (834) and salary data (\$45.8M) for comparison purposes from the Budget Office to the Human Resources Staffing Report to ensure reporting accuracy.
- Assisted 26 auxiliary/designated units with approximately 53 departmental budgets totaling \$73 million.
- Reviewed and uploaded 167 budgets in Budget Development totaling \$213.1M.
- Updated Budget Development procedures to further assist budget managers in the budget upload process and expanded the budget load process to include all of Finance & Administration, Student Affairs, Office of the President and University Engagement.
- Explored new reporting methods, such as Blue Reports, to determine the feasibility and its usefulness for future budget reporting needs and was able to produce some new report formats.
- Successfully reformatted summary budget reports for external use, which entailed general fund proposed budgets by division, department, and budget categories.

CONTRACTS AND GRANTS

2023-24 ACCOMPLISHMENTS

- In FY24 we requested the setup of 52 indexes for external projects that have been awarded to Indiana State University.
- Indiana State University recorded \$179,530 in Indirect Cost Recovery for FY24 F&A recovery for external grant awards.
- Indiana State University recorded \$7,338,321 of externally funded grant costs during FY24.
- FY 22 2CFR200 Uniform Guidance Single Audit with an unmodified opinion & one finding related to Subrecipient Monitoring.
- OCG transitioned to reporting to the Executive Director of Finance instead of the AVP for Financial Services.

ENVIRONMENTAL HEALTH AND SAFETY

2023-24 ACCOMPLISHMENTS

- Monthly and annual inspection of 813 portable fire extinguishers
- Monthly inspection of 358 fire protection control/section sprinkler valves
- Weekly and monthly inspection of 36 post indicator fire protection valves
- Quarterly inspection/alarm and annual operational trip test of 17 water-based pre-action sprinkler and alarm systems in campus buildings and 35 wet sprinkler systems
- Monthly and annual operational/churn testing of 7 stationary fire pumps
- Completed repairs to 40 cases of leaks, failed switches, mechanical parts/malfunctions in water-based sprinkler systems
- Semi-annual inspection and operational testing of 4 fixed CO2 extinguishing systems, 1 fixed halon, 1 energen clean agent extinguishing system, and 1 Sapphire System in Rankin Hall
- Conducted annual fire extinguisher training – 3 groups
- Conducted semi-annual fire safety inspections in all campus buildings
- Conducted semi-annual property conservation audits with Field Engineer from FM Affiliated Insurance Company to assess the University's continuing compliance with requirements and recommendations
- Document collecting and processing for all property conservation activities (fire protection, surface water management, building safety) as required for regulatory compliance from various Authority Having Jurisdiction (AHJ) and recommendations by FM Affiliated Insurance Company
- Installed new replacement 10 lb. fire extinguishers with paper tags (inspection) in elevator equipment rooms per orders from the state elevator inspector
- Annual activation of 168 eyewash and safety shower units
- Over 35 research and teaching laboratories were formally inspected
- Annual inspection and flow test of 120 chemical fume hoods
- Continued update and maintenance of SDS online database
- Universal waste recycled included:
 - 4,487 individual fluorescent and HID lamps
 - 2,047 lb. hazardous waste disposal
 - 820 lb. nonhazardous waste disposal
- Prepared and submitted annual Hazardous Waste Report to Indiana Department Environmental Management
- Indoor Air Quality investigations were conducted in several campus buildings with resolution from HVAC modification, mold abatement, and cleaning of mechanical systems and interior spaces
- Radioactive waste inventory was approved for shipment and pickup was completed in May followed by closure/decommissioning samples that were submitted to the Nuclear Regulatory Commission (NRC) to terminate the University's Material License

- Need for hearing conservation program assessed and in planning mode
- Performed 24 accident investigations
- Trained 300 employees on current safety topics
- Assessed radon concerns
- Reduced spending on personal protective equipment (PPE) and distributed approximately 280 pieces
- Performed fall protection assessment at Hulman Center which was out of compliance and is scheduled to be fixed
- Conducted 5 ergonomic evaluations
- Cranes have been evaluated for deficiencies and are now in the process of being repaired
- Picked up numerous biohazard and sharps containers for proper disposal
- Complete OSHA 300 log

FACILITIES MANAGEMENT

2023-24 ACCOMPLISHMENTS

WHO WE ARE:

Facilities Management is one of the oldest and largest departments at the University. Since its inception on July 1, 1921, it has grown to include over 200 employees working in several divisions, including University Mail Services, University Fleet Management, Power Plant Operations & Maintenance, Grounds Maintenance, Custodial Services, Waste Management / Recycling Services, Building Operations & Maintenance, and Planning & Construction

WHAT WE DO:

Facilities Management plans, develops, and maintains the University's physical environment and provides services which enhance Indiana State University's mission of teaching, research, and public service in support of our students, faculty, staff, and visitors. In doing so, we are constantly seeking creative, visionary and innovative solutions to better meet the needs of our campus while striving to create, promote, and maintain a safe and healthful campus.

Facilities Planning, Design and Construction and Operations and Maintenance:

Projects and Accomplishments:

- Completed 15 major projects worth \$4.3 million.
- Received Tree Campus USA certification for 17th straight year.
- Maintained over 300 acres and 2400 trees on main campus.
- Completed planning and design for Bailey College of Engineering and Technology, and Early Childhood Education Center major projects.
- Completed over 5,000 Service Requests.
- Custodial and Recycling gave over 2,000 tours to various groups.
- Delivered over 10,000 pieces of mail to campus.
- Operations and Maintenance staff managed and completed labor only projects totaling over \$400,000.

University Mail Services:

Incoming mail from the USPS totaled 348,196 pieces consisting of letters, flats, parcels and accountable mail. This is a decrease of 8% from the previous year. There also was 67,000 pieces of campus mail sorted and delivered to departments, which was a decrease of 5%. Outgoing presort mail consisted of 10,498 which was a decrease of 76%. As of December 2022, we no longer send mail to Midwest Presort.

Bulk mail processing for campus departments totaled 435,693 which was an increase of 23% from the previous year. First Class mail processed through the University Departmental Meter amounted to 155,839 which was a decrease of 21%. Total mail handled by ISU Mail Service staff for Fiscal Year 2022/2023 totaled approximately 1,017,226 which is an overall decrease of 3%.

There were 627 stamps sold through our stamp vending machine. Post Office Boxes continue to be the responsibility of the USPS.

Central Heating Plant:

- Completed IDEM Title V Part 70 5 Year Renewal for the Campus.
- Tunnel 7 and Tunnel 2 repair project.
- UPS systems for control system and lighting purchased and ready to be installed.

HOUSING FACILITIES OPERATIONS

We are responsible and committed to the management of maintenance, custodial, special events and projects operations for over 1,100,000 square feet of 24-hour Residential Halls, Dining, and meeting areas in 20 residential and dining buildings. These include over 4,000 student beds in University Apartments, 500 Wabash, Mills, Blumberg, Cromwell, Rhoads, Burford, Pickerl, Erickson, Hines, Jones, Sandison, and Reeve. In addition, Sycamore Dining, 9 restaurants, and retail spaces kept operational. This is accomplished with over 40 full-time skilled and unskilled employees and several temporary workers at peak periods. We are committed to providing

and maintaining safe quality residential facilities, services, and environment which enhances Indiana State University's mission of teaching, research, lifelong learning, public service and commitment to inclusiveness, in support of our student, faculty, staff, visitors, and the entire community of Terre Haute.

Housing Facilities has received, responded to, and completed over 11,000 work orders in the past year. Our goal is to complete all work orders to APPA standard level 2.

FINANCIAL ACCOUNTING

2023-24 ACCOMPLISHMENTS

- Timely and accurate processing of financial transactions including invoices, student refunds, journal vouchers, encumbrances, and disbursements.
- Our ongoing partnership with JPMorgan has been renewed. We are currently upgrading our procurement card software and expanding our vendor payment capabilities to enhance operational efficiency.
- Financial Reporting and Analysis including but not limited to:
 - Completion of FY 2022-2023 Financial Report ensuring that all financial information is reported accurately and in accordance with laws and accounting standards.
 - Added additional info to Lease Query for implementation of GASB Statement No. 96: Subscription-Based Information Technology Arrangements (SBITAs) which has been incorporated into the fiscal year 2024 financial statements, requiring a restatement of the prior year's figures.
 - There has been a revision to our accounting estimate for the Liability for Unclaimed Medical Claims. This adjustment is based on new actuarial data received, which impacts our financial provisions.
- Debt Service Management.
- Streamlined our computer inventory by eliminating redundancies in collaboration with the Office of Information Technology (OIT)
- Oversight of Student organization services.
- Restructured department to add Bursar Operations with staffing changes. Included appointing new University Bursar, Executive Director of Finance, Director of Financial Services and Financial Analyst for Fixed Assets from existing staff. Hired new staff due to turnover. Worked with all affected staff to train on policies and procedures.
- Worked with Athletics Department and Sackrider Accounting in completing annual NCAA audit.
- Provide custom Banner Finance training for individuals / departments / chairs upon request.
- Review vendor analysis of monthly transactions for fraud and opportunities to use Pro-Cards to increase rebate.
- Reviewed available options for AP automation.
- Monitor university budget, including auxiliary and departmental accounts.
- Financial Forecasting – research and collect data to create quarterly financial forecasts for the university.
- Taxes:
 - Tax management including but not limited to creation and distribution of all 1099, 1098-T and 1042-S Tax forms.
 - Worked with outside accounting firm to prepare and file form 990-T Annual Income Tax Return.
- Technical / Systems

- Worked with OIT and departmental staff to separate web content to internet vs intranet and create both internet (external) and intranet (internal) websites for Office of the Controller and Procurement. Included training on new platform for Intranet development.
- Collaborate with OIT on software upgrade, testing and implementation for all ISU OIT managed upgrades.
- Collaborate with Vendors on software / website upgrades impacting ISU. Vendors included Egencia, Enterprise, Altour, Chrome River, and JP Morgan Chase.
- Work with Chrome River to prepare to implement major enhancements to upgrade interface to Ethos platform while incorporating system enhancements. Required modification to several existing processes related to expense breakdowns and forgoing use of a clearing account for Pre-Approvals.
- Managed and enhanced processes for Finance security relative to Separations and Transfers.
- Travel:
 - Management of Travel activities including Pre-Approvals, Expense Reports, Cash Advances, Direct Bills, and Travel Cards.
 - Worked with Global Engagement Office to prepare travel information for faculty for international travel.
 - Worked with vendor (Emburse / Chrome River) to define business requirements and test system upgrades for new interface to Banner.
- Office of Procurement:
 - Oversight and support for the Office of Procurement.
 - Technical support for the Office of Procurement including consultation of existing systems / processes, website creation & maintenance, and reporting and analysis as requested.
 - Assist in creating quarterly minority reports for the state of Indiana.
 - Security Administration for Office of Procurement.
 - Completed search for and hired a new Director of Procurement.
 - Review types of paperwork in files to prepare for ImageNow digital storage instead of filing cabinets. Worked with OIT to define and create 20 different types of documents and what would be stored / indexed for each.
- Office of Contracts and Grants:
 - Oversight and support for the Office of Contracts and Grants.
 - Security administration for the Office of Contracts and Grants.
 - Technical support for the Office of Contracts and Grants website creation and maintenance and reporting.
- Bursar Operations:
 - Oversight and support for the Bursar Operations.

FINANCIAL SERVICES

2023-24 ACCOMPLISHMENTS

- Designed a payment site for Student Engagement to allow online organizations to make online payments for the Blue & White Homecoming Parade.
- Collaborated with university departments to create, and subsequently modify, a payment site to accept payments for Faculty Led Travel.
 - Engaged in conversations regarding Faculty Led Travel and how the information would be presented on the 1098T tax form for students.
- Modified existing payment sites associated with Residential Life, Community School of the Arts, Continuing Ed, Faculty Led Travel, to work with baseline software programming (TLink) provided by the payment platform vendor (TouchNet).
- Gained knowledge of how the new 150% Global Initiative of Strategic Importance rate would impact student non-resident fee assessment and worked with Registrar's Office to determine a proper code of 'A' would be necessary.
 - Adjusted Argos reports that were impacted by the new code so accurate information will still be pulled as needed.
- Tested and implemented processes to transition from COBOL ISU custom procedures to the JAVA Ellucian baseline procedures in Banner Job Submission for 5 processes.
- Performed required steps necessary to purge a sample of records from TBRACCD and verified all financial accounting information was unchanged once data was purged.
- Conferred with several university departments, as well as external agencies, related to Dual Credit/College Challenge and whether the information needed to be reported on the 1098T tax form for students, as well as the creation of a new year-round term to be used for the programs for ease of registration and reporting.
- Reviewed information and had conversations with other universities related to various topics of interest at ISU, such as...
 - Perkins Loan Assignments
 - Internal & External Collection efforts
- Met Department of Education requirement of assigning all Perkins loans currently 24 months past due, as well as assigning additional defaulted loans to reduce the current portfolio.
 - Assigned 242 Perkins Loans to the Department of Education.
 - Continue to review accounts monthly to determine if they are ready for assignment.
- Intercepted more than \$490,000 through Indiana Department of Revenue Tax Offset Program.
- Completed Payment Card Industry assessment with a compliant rating.
- Reviewed 81 vendors to ensure Payment Card Industry compliance.
- Improved university collections processes to increase efficiency, improve accuracy, and track data to determine success of collection efforts.
 - Added monthly courtesy calls for accounts in University Collections.
 - Implemented quarterly projection processes to anticipate the annual BOT approved write-off of past due accounts.

- Wrote Argos reports to improve efficiency in sending accounts out to external collection agencies.
 - Created additional Supplemental Data Engine fields and Hold codes in Banner to allow additional tracking of accounts in collections.
- Wrote new Argos reports to improve efficiency and tracking of billings and Accounts Receivable information.
 - Special Fees report to verify all courses with lab course fees are accurate prior to Advanced Register bill.
 - Collection Fee report to improve efficiency of applying late fees at collections.
 - Clean up bill report to improve efficiency of bill preparation.
 - Departmental charges report to ensure external departments are assessing charges correctly and in a timely manner.
- Finished imaging old collection folders into the document imaging system to reduce the amount of physical paper/folders/sensitive information in the area.
- Assisted with providing information requested as it related to the Department of Defense audit, MOU, and Veteran survey.
- Successfully tested and assisted OIT with transfer of TouchNet Banner Connect software to new servers.
- Updated new analog phones in cashier area to allow four lines per phone.
- Collaborated with multiple areas to accommodate 3-week course in the summer semester.
- Performed a variety of tasks related to Preferred Partners, inclusive of reviewing agreements, adjusting reports to capture fee calculations, staff training of Banner screens, etc.
- Participated in Active Shooter Training and had ISU Police conduct a risk walk-through of the area.
- Tested Banner 9 Self-Service Proxy in conjunction with Registrar's Office.
- Reviewed cash handling site procedures and tightened controls to ensure accuracy of deposit from departments.
- Engaged in project with TouchNet to begin implementation of PayPath processing for credit/debit cards and passing on the service fee charge.
 - Marketing campaign to alert students to the upcoming change.
 - Behind the scenes work with TouchNet to prepare for July 1, 2024, Go-Live.
- Review of Bursar Operations website and creation of Sycamore Root Intranet site for students and employees.
- Trained Bursar Operations staff and Financial Aid staff regarding Red Flag Rules.
- Conferred with multiple departments regarding International Recruiting Agreements.
 - Review of agreements.
 - Creation of TEAMs site for internal communication.
 - Design of checklist for commission requirements to ensure all are met prior to payment.
 - Development of spreadsheet to record all active international recruiting agreements and accompanying global initiatives, inclusive of length of agreement.
- Created partnership with State of Michigan Vocational Rehab for student payments.
- Began discussions with staff in the Recreation Center regarding the purchase of new software and its integration with TouchNet, as well as review of the vendor contract.

HUMAN RESOURCES

2023-24 ACCOMPLISHMENTS

Employment

- Implemented a process for identifying duplicate users at the application stage (applicants who have more than one account) so that the issue can be resolved before the hiring proposal is created to avoid errors at HR Records approval stage. This process helps with direct hires, but we are yet to find a solution for regular searches. PeopleAdmin does not currently have a merge tool to manage duplicate users.
- Re-implemented the use of Onboard (one of PeopleAdmin's modules referred to as Employee Records). This module enables us to start the transition of new hires into the university by having required employment forms electronically completed, prior to the start date. Therefore, making the transition of new hires easier and reduces the amount of time spent in Human Resources completing new hire forms.
- Partnered with the Office of Diversity, Equity, and Inclusion to train 249 search committee members. A total of 28 training sessions were offered.
- Conducted four sessions on the Applicant Tracking System.
- Background Checks Processed: 875 staff, faculty, student employee, graduate assistant, and volunteer background checks.
- The following activities were accomplished through ATS:
 - Total of 3,518 applications of which 1088 were faculty and 2,430 were staff
 - Total of 361 positions posted of which 141 were faculty and 220 were staff
 - Total of 767 hiring proposals were processed which include, 340 staff, 154 new and re-hire faculty, and 273 full-time and part-time faculty reappointments.
- Worked on the intranet and external content for Employment, Employee Relations, and Training Professional Development web pages.

Employee Relations

- Partnered with the President's Office to plan and implement an in-person Employee Recognition and University Medallion award ceremony
- Drug-Free Workplace notifications:
 - Annual Notifications to 3245 employees
 - Monthly notifications to 1933 new employees
- Annual Fire and Safety notifications to 3245 employees
- Termination Analysis for separating employees; 109 separations of full-time staff and Faculty
 - **These numbers are only through April** (still waiting on Payroll to make final entries on most faculty for end of academic year usually not until October are they finalized)

- Exit Interviews; online (66) and face-to-face (52) data collection for staff
- Unemployment claims submitted to DWD
 - Faculty/Staff/Student claims online: 19 faculty and staff / 3 student
 - Various fax/paper claim submissions: 24
- Disciplinary action letters: 94 write-ups written/issued; 20 termination letters written
- Grievance Appeal Committee 2024 to 2027 created and trained
 - 22 committee members went through training and committed to serving 3 years
- Years of Service Recognition data files submitted to OC Tanner for on-line catalog creation
 - 12 monthly files created and submitted to OC Tanner for 156 employees
- One-year anniversaries – gifts given and congratulatory email and meeting for 105 employees

Training and Professional Development

- A total of 24 bi-weekly face-to-face staff orientation sessions were held for 148 new staff.
- Completed the migration of the eLearning program from Skillsoft to Percipio which is a more robust online training management platform.
- Collaborated with other departments/offices to offer the HR's Refresher Quick Tips training sessions. HR conducted a survey to determine the training needs, then designed and implemented the training covering different topics.
 - Fall 2023 series – 162 registered/ 104 attended
 - Spring 2024 series - 104 registered/ 75 attended
- Prior to the migration from the old Skillsoft training platform in January 2024, the New Employee Welcome Training completion rate was between 78-82%. However, with the new Skillsoft Percipio program, the completion rate is at 37%, which could be partly attributed to the transition since this was a completely new platform that took time to set up and with different navigation features. The goal is to increase this completion rate by continuing to provide guidance, and reminders to new employees.

Benefits

- Implemented 24-7 Triage for Work Comp injury reporting. This expedites direction of care and meets state board's requirements for timely reporting.
- Facilitated the change from UMB HSA Authority to MetLife HSA for January 2024 effective dates.
- Hosted the Indiana Immunization Clinic in October of 2023 on campus for employees, students and community members. Over 200 people received various vaccinations/immunizations.
- Wellness Screenings for 2024 Health Discounts were completed with nearly 900 participants

Compensation

- Implemented Target Salary Increases as of November 1, 2023, and 3.5% overall increases as of July 1, 2024.
- Assisted departments across campus in their efforts to downsize by reclassifying numerous positions.
- Improved the remote hire process through via electronic formats.

HR Information Systems

- Activated the beneficiary module in Employee Self-Service for review
- People Admin: Cleaned up and synchronized user account information within the 5 People Admin modules so each of their sub modules could work with the other modules
- Cleaned up and synchronized all active employee accounts between banner and People Admin. People Admin implemented new functionality that prevents the system from working properly for Faculty and Students.
- Revamped applicant account creation process and content pages to hopefully minimize the number of duplicate accounts applicants can create. This includes system checks to prevent duplicate account information
- Worked with all areas of employment (Academic Affair, HR Employment, Student Employment) on the resolution of duplicates created by applicants
- Internal HR Website Creation – built out the infrastructure and required each sub area of HR to review and update their information. New information was moved to the internal site as well as maintain the same information on the external site, if applicable
- Review & Update of HR's External Website – updated content that our external users would need. Once the content was updated, worked with OIT to convert the pages to the most recent version of Drupal then built out the infrastructure (real estate of how the information is laid out on the pages).
- Review of what it will take to update and maintain supervisor information on the NBAJOBS form in Banner
- Student EPAFs - Payroll was originally doing the installation and configuration of this back in 2015 - 2016. During this reporting period, HR was asked to install and configure Student EPAFs for People Admin to Banner integration as well as the home grown EPAFs
- Automated new file creation notification for all the documents received via the Secure file upload process
- Worked on cleaning up security classes for offices external to the HR area
- Worked with users to clean up data for required Federal & State reports (VETS, AAP etc.)

PROCUREMENT

2023-24 ACCOMPLISHMENTS

Procurement Office and Personnel

- New Office of Procurement department naming change from Purchasing Feb 2024
- New Procurement Guidelines approved Feb 2024 expanded purchasing abilities on Pro-Cards and in purchasing power to the \$10k level.
- New Director – Hired Bryan Bromstrup Feb 2024 with 30+ years’ experience in administrative operations and purchasing.
- Promotion - Kara Sterling to Senior Buyer & Procurement Operations Manager March 2024. Kara position was upgraded to match her duties and abilities as a member of the Office of Procurement assisting in the development and operational elements of the department.

Purchase Orders and Diversity Spending

- PO’s Cut /Total Spend – 1423 POs in FY23/24 with total spend of \$38,779,384
- XBE Reporting for 2024
 - Reported quarterly to the State of Indiana Governor’s Minority/Women/Veteran Owned Business Committee.
 - Partnered with DiversiFind to increase XBE connectivity and assist with vendor IDOA registrations.
 - Participated in Black Expo’s on-line Minority Conference June 2024
 - Reported FY23/24 to IDOA – weighted goals not achieved but increased percentages in certain areas:

	MBE	WBE	IVOSB	TOTAL
Commodity/Supplies	96 for \$229,380 7.18%	99 for \$196,463 6.15%	22 for \$2997 .09%	217 for \$428,840
Construction	2 for \$93,000 1.52%	6 for \$69,508 1.14%	0	8 for \$162,508
Professional Services	9 for \$145,721 1.36%	41 for \$1,980,855 18.47%	0	50 for \$2,126,575
Totals:	107 or \$468,101 2.34%	146 for \$2,246,826 11.22%	22 for \$2997 .01%	275 for \$2,717,924
Weighted Averages: Goal		MBE 8%	WBE 10%	IVOSB 3%
Actual		MBE 3.35%	WBE 8.59%	IVOSB .03%

- **Major Contracts Issued**
 - Timelycare – Student Healthcare web application.
 - SimpsonScarborough - University Brand Strategy Marketing and Growth
 - Cisco SmartNet Networking renewal

- Construction Projects for the Center of Technology and Early Childhood Development Center started.
- Cintas Uniforms – campus uniform needs
- Johnson Controls – electrical access and fire protection contract(s)
- JP Morgan – ProCards
- Conversion of some POs to contracts to reduce the need for yearly standing orders
 - o Educating Departments on best practices for yearly contract and standing order needs.

New Initiatives

- Webpage Upgrade is still in progress but both internal and external facing have been upgraded and working to complete minor changes.
- Imaging – collaborating, testing and implementing scanning project to digitize archival procurement documents begun this past summer with connectivity and set up complete. Scanning of old files has begun.
- Bidding of contracting work (Electrical, Mechanical, Insulation, HVAC etc...) to 3 years cycles rather than every year. This has had a two-fold benefit in lowering our over rates across the period and improved the inefficiency in changing contracts each year with stronger relationships for longer periods of time and contractors understanding better situations as they arise on campus.

PUBLIC SAFETY

2023-24 ACCOMPLISHMENTS

- The Indiana State University Department of Public Safety has continued to serve the Indiana State University Community thru the 2023-2024 period despite facing critical staffing shortages and a declining student population.
- In addition to normal day to day operations, the Indiana State University Police Department continues to work extra details to provide the highest level of safety possible to the community at sporting events, social events on campus, and community events that are held on campus.
- The Indiana State University Public Safety Department went thru the rigorous process of reaccreditation thru the International Association of Campus Law Enforcement Administrators (IACLEA) in June of 2024. While official word has not been given yet, as it takes a mandatory vote for approval, IACLEA assessors indicated that they anticipate Indiana State University Public Safety to be reaccredited for another four years.
- We have recruited one full time dispatcher to fill one vacancy and recruited a former dispatcher to come back to Indiana State University Dispatch part time. We are currently at full staffing for the Dispatch Center.
- The Indiana State University Police Department has recruited 6 Police Officers with four already graduating the Indiana Law Enforcement Academy and two currently being at the Indiana Law Enforcement Academy. During the past year, our Field Training Officers have provided over 2,400 hours of on the job training to these 6 Officers. In addition, we have offered conditional offers of employment to three new Police Officers with anticipated start dates of October 14th, 2024.
- The Indiana State University Public Safety Department developed a new internal position in January of 2024 and recruited a Fire Safety Officer/Emergency Manager. This position will assist in campus fire prevention, emergency management, drill planning and execution, AED management, and serve as another point of contact with our local public safety community partners.
- Staff from the Indiana State University Police Department worked at the Vigo County Junior Police Academy for three weeks during the summer of 2023 and for three weeks during the summer of 2024. Each year, between 400 and 500 local middle school children participate in the program, enhancing community relations between law enforcement and the public while exposing children to some aspects of a potential career in public safety. In addition, Indiana State University Public Safety Officers presented at over 100 community-based events during FY24.

RISK MANAGEMENT

2023-24 ACCOMPLISHMENTS

- Successfully accomplished 2023-24 United Educators training plan goal for Reducing Premises Accidents, Slips and Falls resulting in a \$82,098 insurance premium credit
- Collaborated with United Educators to map data and develop ISU's platform on a new LMS system for training modules which we successfully converted to in FY24.
- Reviewed 50 unique events with the Special Events Committee and student groups.
- Reviewed 17 contracts for approval of insurance provisions.
- Processed 6 notices of auto/liability claims/potential claims and follow-up investigations.
- Managed 2 auto claims not filed with insurance.
- Provided 14 verification letters for professional student placements.
- Managed 215 different matters that came through the Office of Risk Management for various topics.
- Completed 'Did You Knows' in the ISU Today for 11 different risk management topics
- Condensed the vehicle procedures and guidelines and created a new document for reserving vehicles via Enterprise.
- Collaborated with the Pride Fest Working group
- Participated and collaborated with the URMIA Essential Skills Resource Development Task Force
- Collaborated with the Community School of Arts to provide training for volunteers working with minors on campus.
- Completed applications and secured insurance renewals for 9 lines of coverage.
- Processed audits for workers compensation policies that include the flight academy and our group accident policy
- Collaborated with the Clery team and the Emergency Response team
- Managed appraisals conducted by Kroll for Burford, Career Center, HMSU/Commons, Parsons/Rakin Hall, Reeve Hall, University Hall, Condit House and Condit garage
- Assisted employees on access to the UE portal to complete required training modules
- Submitted and completed training plan for the United Educators 6% premium credit for the 2024-25 policy renewal.