

CSUSM

# Project 3S Update

Service, Streamline  
& Stewardship

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AVP of Administration



# Agenda

- What is 3S?
- Progress
- What's Next?







# What is 3S?



# Progress

## Focus Groups Members

- Malachi Harper
- Amy Armstrong
- Nancy Santiago
- Crystal Henderson
- Christa Koen
- Rita Cooper
- Pia Bombardier
- Melinda Jones
- Margarita Robles
- Jill Heath



## Focus Group Topics

- Direct Pay, ProCard & Hospitality forms and process
- Travel forms and process
- Human Resource requisition and salary actions forms and process
- Human Resource requisition and salary actions forms and process
- Purchase requisition forms and process
- Communication (initial and ongoing)
- Education (onboarding kit, training and conference)

## Focus Group Questions

- Will ProCard Team consider one-time limit increases again?
- Can we combine Payroll and AP Direct Deposit on one form?
- Am I notified when I am reimbursed via ACH?
- Consider threshold for hospitality activity not requiring form?



# Progress

- Expanded Direct Pay options/limits
- ProCard offsite services expanded
- Sunset the Request for (purchasing) Approval Increased hospitality per person limit for breakfast
- Revised Independent Contractor (IC) Agreement/process
- IC Invoice Template
- Enhance FAQs and checklists






# Progress

- Student Travel Process
- International Travel – Reduced required signatures by 25%
- No longer require an after-the-fact form for hospitality requests submitted after expense
- Addressed ~100 questions/comments from focus groups



# Progress

- Streamlined hospitality form
- Reader friendly format
- We welcome feedback!


 California State University  
 SAN MARCOS

## Hospitality Authorization Form

Business Unit: State/Foundation


Please note the following:

- One (1) form is required per event
- An event which takes place over multiple consecutive days is considered one event
- One (1) form may be submitted for multiple dates of the same event type

Requestor Info	
Full Name: ██████████	CSUSM Email: ██████████
Department: FAS	

Hospitality/Event Info	
Description/Title of Event or Program: ██████████ Workshop	
Please explain the business purpose of ██████████ potential while discovering the tools to maximize performance and this expense and the benefit to the CSU: ██████████ enhance workplace culture.	
Event Start Date: 02/23/2023	Event End Date: 02/24/2023
Location/Venue of Event: McMahan House	

Attendee or Recipient Type (Please check all that apply)	
<input type="checkbox"/> Donor	<input type="checkbox"/> Spouse or Domestic Partner
<input checked="" type="checkbox"/> Faculty, State and Auxiliary Staff, Student Assistants	<input type="checkbox"/> Student
<input type="checkbox"/> Official Guests	<input type="checkbox"/> Student Athlete
<input type="checkbox"/> Research Participant	<input type="checkbox"/> Other

Will there be Food and Beverage at this event? Yes Please include backup documentation that includes the per person calculation for every meal.   
 Will there be Alcoholic Beverages at this event? No  
 Are gift cards part of the event? No

Hospitality Categories and Funding Information (Please check all that apply)	
<input type="checkbox"/> Awards and Service Recognition	<input type="checkbox"/> Memberships in Social Organizations (Auxiliary funding only)
<input type="checkbox"/> Bereavement Gift Expenditures	<input type="checkbox"/> Participation Incentives – Research funded survey/study or student participation in events
<input type="checkbox"/> Community Relations	<input type="checkbox"/> Participation Incentives – other (Auxiliary funding only)
<input type="checkbox"/> Donor Gifts	<input checked="" type="checkbox"/> Professional Conference, Meeting, or Reception
<input checked="" type="checkbox"/> Employee Business Meetings	<input type="checkbox"/> Promotional Items
<input type="checkbox"/> Employee Morale and Recognition	<input type="checkbox"/> Recreational and Sporting Events (Athletics only)
<input type="checkbox"/> Fundraising	<input type="checkbox"/> Student Recruitment, Engagement, or Recognition

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# Progress

- Developed to assist Administrative Support Coordinators, Analysts and Managers
- One-stop shop to introduce FAS processes
- Help staff identify the correct mechanism and department to carry out typical operational support duties
- Not an all-inclusive guidelines/manual

## FINANCE AND ADMINISTRATIVE SERVICES (FAS) BUSINESS PROCESS ORIENTATION/REFRESH TOOLKIT

FOR OPERATIONS COORDINATORS/ANALYSTS

### WELCOME!

We look forward to working with you! FAS is committed to delivering an excellent customer experience while maintaining fiscal stewardship of our resources.

This toolkit was developed to assist Administrative Support Coordinators, Analysts and Managers supporting and completing business processes and operations on behalf of departments, units, and colleges. The toolkit is a one-stop shop to introduce FAS processes and help staff identify the correct mechanism and department to carry out typical operational support duties. For complete guidance, please refer to the department website, subject matter experts and manuals/guidelines/policies.

For questions related to this document, contact [vpfas@csusm.edu](mailto:vpfas@csusm.edu).

### PREPARING FOR BUSINESS PROCESSES

To initiate a business process, you will first need to know the business unit and chartfield string. Identifying the business unit and chartfield are critical to determining applicable processes and required approvals.

### BUSINESS UNIT

CSUSM business processes may vary depending on the business unit. Within PeopleSoft CMS, each business unit represents an operational entity and is required for all financial transactions. The University and three Auxiliaries each have their own business unit.

CSUSM has four main business units:

1. SMCMP: State funds, including operating, stateside self-support, and stateside trusts
2. SMURS: CSUSM Corporation
3. SMFND: CSUSM Foundation
4. SMASI: CSUSM Associated Students, Incorporated

Before beginning a business process, identify the business unit you are using.

### CHARTFIELD

A chartfield string is a string of numbers that make up the Chart of Accounts in CFS (Common Financial System) PeopleSoft. All chartfield strings must include fund and account. All revenue and expense transactions require a department ID. Certain transaction may need additional tracking, using class code and project. Chartfields provide a common language for classifying and grouping business transactions.

# Progress

- Pilot series targeted towards staff business partners
- Networking
- Community of practice
- Targeted training to enhance learning based on specific unit operations
- Virtual and in person options

## BUSINESS OFFICER PROGRAM SERIES

An immersion learning and community-building experience built around a four-series model. Designed to create connected cohorts of CSUSM administrative professionals across divisions and professional expertise.



### WHO SHOULD ATTEND?

The training is for CSUSM staff. If you are working in an Administrative Coordinator or Analyst position responsible for business processes related to procurement cards and requisitions, travel, payments, human resources, administration and/or finance, you should attend BOP.

### WHEN AND HOW

FAS will pilot the BOP series from February 2023-May 2023. Each series consists of four tracks, administered once per week for four weeks. Participants can complete tracks as needed, but we recommend completing consecutive tracks through completion.

### WHAT WILL YOU LEARN?

BOP content is designed to provide participants with a combination of courses on current policy and processes, practical solutions, and personal development. To provide this broad perspective, each course you take may not be specifically related to your field, but it will give you a foundation for future opportunities.

- ✓ GAIN A BROADER PERSPECTIVE OF CSUSM BUSINESS ADMINISTRATION
- ✓ DEVELOP PROFESSIONAL RELATIONSHIPS WITH COLLEAGUES FROM OTHER UNITS
- ✓ DISCUSS THE LATEST ISSUES AND TOPICS IN STREAMLINING PROCESSES
- ✓ BE THE GO-TO IN YOUR DEPARTMENT TO PROCESS REQUESTS FROM YOUR DEPARTMENT TO FAS
- ✓ LEARN HOW OTHER UNITS DEAL WITH COMMON ISSUES



# What's Next?



**Streamlined ProCard Reconciliation**



**FAS FY23/24 Goal Setting**



**PCBO Website Refresh**



**Delegation of Authority Guidelines**



**Form Field Uniformity**



**Hospitality Form Examples**



**CSUBUY**

[https://www.csusm.edu/fas/fas\\_strategic\\_plan.html](https://www.csusm.edu/fas/fas_strategic_plan.html)



# FINANCE AND ADMINISTRATIVE SERVICES STRATEGIC PLAN

## MISSION

*We build the foundation for student success through service, innovation, and stewardship of resources.*

## VISION

*We will be the trusted partners for delivering financial and administrative excellence.*

## CORE VALUES

- **People-Centered.** We believe our people are our most valued asset. Therefore, we strive to create an environment where everyone is treated with empathy and respect. We promote and enable work life-balance.
- **Diversity, Equity and Inclusion (DEI).** We are stronger when we have diverse perspectives in an inclusive environment where all voices are valued. We actively apply a DEI lens to all actions and processes.
- **Mission Driven Outcomes.** We focus on and deliver outcomes that enable the University to fulfill its mission.
- **Integrity and Collaboration.** Together, we work openly and honestly. We develop meaningful relationships, offer constructive feedback and share ideas.
- **Innovation.** We foster and support innovation, strive for continuous improvement, and encourage new approaches.

## STRATEGIC PRIORITIES

- **Enhance Workforce Strategies:** Develop strategies to attract, retain and engage a qualified workforce.
- **Strengthen Core Services:** Adopt a continuous improvement mindset to improve service delivery, create capacity, maintain stewardship, and enhance the campus experience.
- **Build and Nurture Partnerships:** Develop new and strengthen existing internal and external existing partnerships to support the campus and the community.
- **Promote Sustainable Development:** Integrate sustainability into daily operations, infrastructure, business practices, and enterprises to create a socially and environmentally just campus for current and future generations.

THE POWER OF **CSUSM**

FAS STRATEGIC PLAN

# Questions

