



Annual Report

Fiscal Year 2018-2019

Division of Finance & Administration



Oregon State
University

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Refining how we support the OSU mission

Message from the Vice President

In August 2019, over 400 of the Division of Finance and Administration's 700 employees gathered for our annual meeting and awards ceremony. We came together to celebrate the progress we have made toward reaching our shared goals and to recognize the significant efforts of the many individuals and teams who made it happen.

Everything we do in the Division of Finance and Administration (DFA) is in support of OSU's mission. Our work is integral to the success of students, faculty and researchers. From budgeting, accounting and financial services to purchasing and recycling materials, from wellness and emergency preparation programs to training and career development, the breadth of the division's work impacts every member of the OSU community. That is why our core goals—providing great **Service**, the responsible **Stewardship** of university resources, and protecting the **Safety & Health** of the community—remain our foundational focus.

Over the 2018-19 fiscal year, DFA leadership teams and managers have been working on several significant projects to shift the way we deliver our services and conduct our work, asking ourselves some important questions.

- Can we make university processes easier for people to navigate?
- Can we more effectively utilize OSU's limited resources?
- Can we develop infrastructure and physical resources that better support OSU's mission?
- Can we improve the safety and health of our students, faculty and staff?
- Can we establish more dynamic and rewarding career paths for university employees?

To help answer these questions, we started the **DFA Framework for Success** project, described in more detail in this report. Through this initiative, we are engaging with employees throughout the division to build a shared approach to our responsibilities that is centered on OSU's mission and core values. It is intended to more clearly connect individuals' daily work to the university's broad goals, while building a more positive and sustainable workplace culture within the division. The Framework's guiding principles are beginning to inform our plans and actions, and provide employees with a strong foundation that also allows for flexibility and judgment in assisting our community partners.



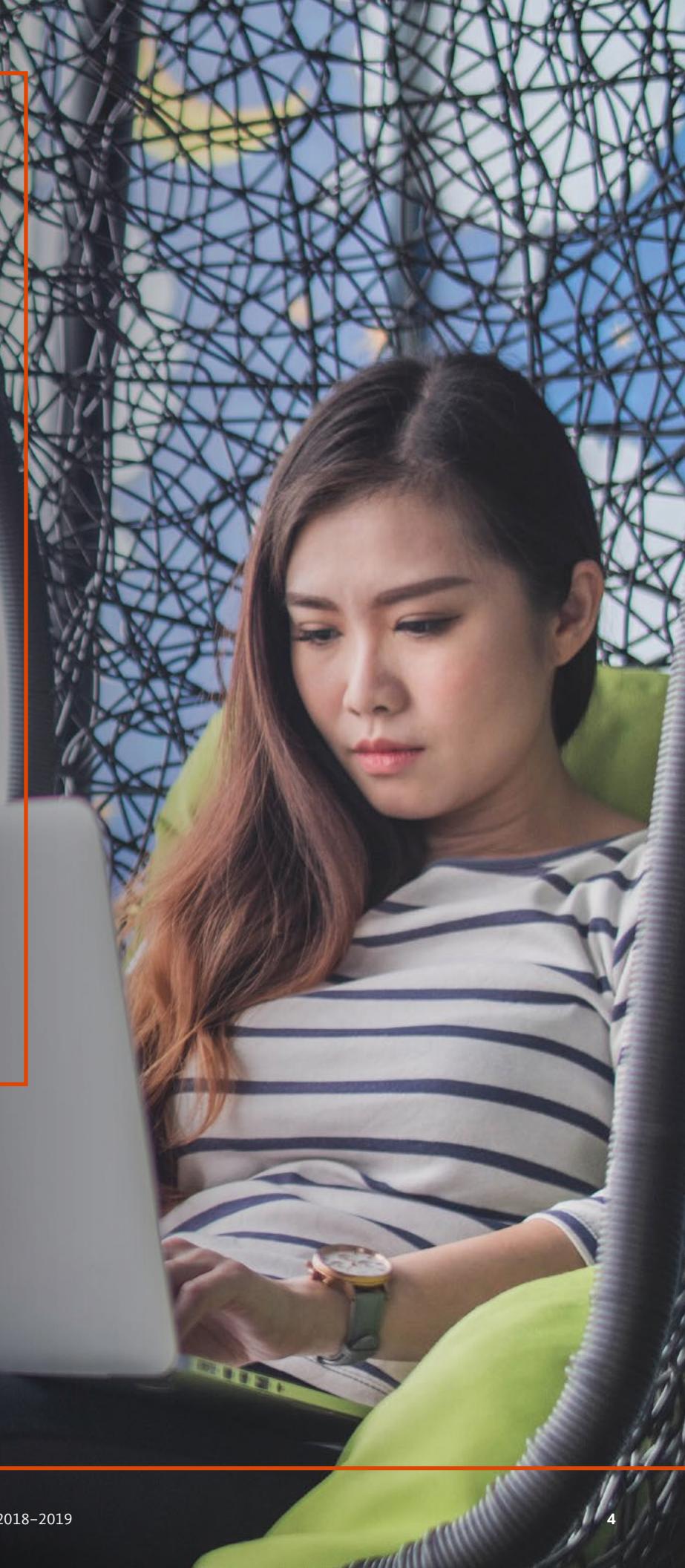
At the same time, we have been taking concrete steps to improve and streamline our work, with efforts like the **Beaver Works** business operations improvement project and the new **Fiscal Policy Program**. Updates about these programs and many more important efforts are also included in this DFA Annual Report for the 2018-2019 fiscal year.

I am proud of the hard work and dedication of all the employees in the Division of Finance and Administration. As President Ray once told us, the DFA makes the university run and our work really matters. Together with the division's senior leadership team, I am thankful to the members of the OSU community for consulting with us and challenging us to improve and grow. Together we will incorporate more effective methods, tools and technologies into our work. And, together we will continue to develop finance and administration practices that position OSU as a leading research university in the 21st century.

Sincerely,
Michael J. Green
Vice President for Finance & Administration

Framework for Success provides guidance and tools for employees

In 2018-19, DFA leadership teams and managers laid the foundation for the DFA Framework For Success. Working with OSU professor Dr. Javier Calvo-Amodio (an expert in systems engineering) and his graduate research team, division employees are collectively developing the Framework to focus our efforts on supporting the university's mission as effectively and efficiently as possible. This work, along with other division-wide projects to streamline business processes, are setting us up to see benefits in fiscal year (FY) 2020.





Guiding Principles

The Framework for Success started with the creation of a set of guiding principles that are informing DFA priorities and actions. They remind us of the big picture behind our goals and are the touchstone for our decision-making. These guiding principles are intentionally framed within the university's core values to signify the importance of our values in everything we do.

Key Performance Indicators

As FY2019 came to a close, division leaders were finalizing a set of division-wide key performance indicators (KPIs), which are broad categories that define the things we all agree are important to pay attention to, like people, financial sustainability and operational excellence. Key performance indicators allow units across the division to speak a common language, despite our vastly different jobs and responsibilities. Having a common set of KPIs will allow us to show the progress we are making and answer the question "how are we doing?"

Metrics

In the upcoming year, each unit in the division will define metrics to measure how we are doing in specific areas. All individual metrics will align with one KPI, making it possible to compile all our wide-ranging metrics into a cohesive picture of performance for the whole division. Then, we will establish a routine of continual improvement, shaping what we do and how we do it to perform better and better over time.

Risk Assessment Tools

Inspired by the Framework for Success and the Beaver Works business operations projects, the DFA leadership team has been, the DFA leadership team has been working closely with the Office of Audit, Risk and Compliance to develop a set of university risk appetite statements and risk assessment tools. The goal is to empower employees at every level of the institution to make appropriate and informed decisions that incorporate best practices and consider the full spectrum of circumstances and stakeholders. Taken together, these tools and guidelines should allow DFA units to be more responsive to the needs of the university community. They are intended to balance flexibility with strong boundaries where they are needed, to efficiently minimize risk to OSU and our people. The risk assessment tools were developed during 2018-19, with implementation and employee training on the tools scheduled to begin in fall 2019-20.

Framework Guiding Principles & Desired Outcomes

Structured and inclusive decision-making generates effective results.

Clear and transparent communication conveys and confirms intent and respect for all stakeholders.

Process consistency, balanced with flexibility improves efficiency and effectiveness.

Community safety and respect for its members embodies our core values, and enables our mission.

Active stewardship of resources ensures the long-term success of the university.

Assessing and managing risk balances innovation and compliance.

Clearly defined and integrated policies, standards and processes, coupled with appropriately delegated authority that removes institutional bias empowers employees, and improves the satisfaction of all stakeholders.

Long-range planning

Long-range planning, like that required for effective institutional management, is a key activity within the Division of Finance and Administration. Division employees have built and continue to refine tools like the ten-year business forecast and financial performance metrics, which allow university decision makers to better evaluate future initiatives and projects for cost effectiveness, return on investments, and overall financial health. The data and analyses that arise from these forecasts are useful to the Board of Trustees in managing its oversight responsibilities for the university.



Fully implemented new hybrid budget model and targeted budget reductions

The Division of Finance and Administration plays an important role in supporting OSU's primary mission of education, research and outreach. We recognize our responsibility to be the best stewards we can of university resources and to keep administrative costs as low as possible. In fiscal year 2019, flattening enrollment forecasts, the need to keep tuition rates as low as possible, and inflating costs meant that the university must find new revenues and reduce expenses. The Office of Budget and Resource Planning led the university in collectively addressing a \$9 million budget shortfall in FY2019, while continuing to fund areas of strategic and targeted need, like financial aid and building maintenance.

Shared Responsibility Budget Model fully implemented

The new Shared Responsibility Budget Model was fully implemented in FY19 for academic colleges. It was developed as a hybrid approach that uses elements of Responsibility Center Management budgeting but also encourages collective decision-making about revenue generation, investments in services and academic programs, and the development of cross-unit collaboration. This budget model is intended to:

- Align budget allocations to best support and advance the university's strategic goals.
- Recognize the diverse academic missions of OSU's colleges and centers.
- Promote interdisciplinary and collaborative teaching, research, and outreach.
- Ensure the university is financially sound and can make the long-term investments required for success.

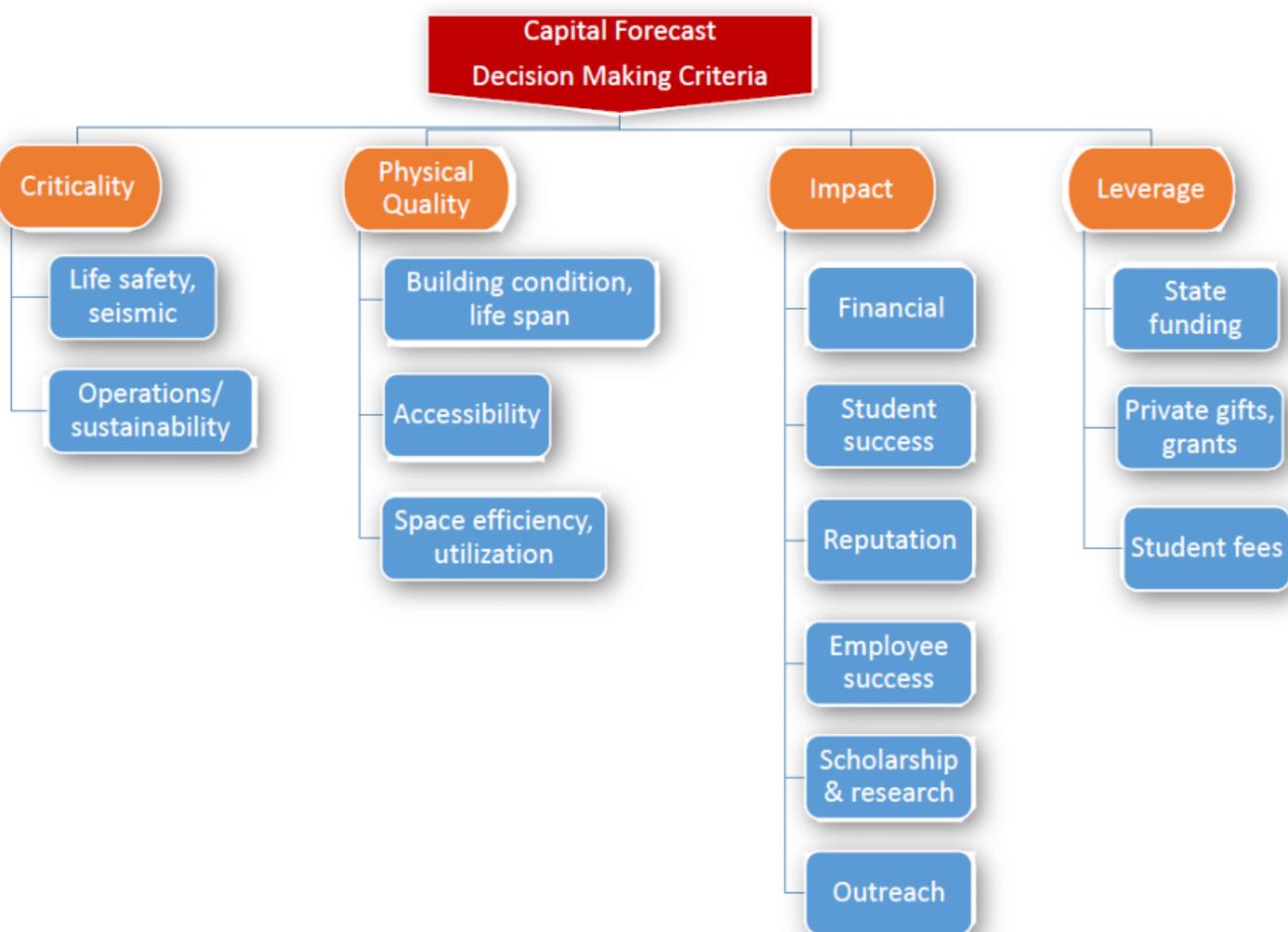
University leadership has worked to increase clarity and discipline in the budgeting process by clearly linking budgets to the programs and results delivered by units; encouraging financial decision-making and entrepreneurship at local levels in support of OSU's goals; and providing equity, transparency and predictability in budgeting within a shared governance environment. The Office of Budget & Resource Planning has developed a process that keeps the university and all of its components financially healthy, while defining clear responsibilities in areas where different kinds of costs need to be managed. It strives to use accurate, easy-to-understand metrics and measures that help colleges and units best manage their resources to advance their goals. In FY19, the budget office added an annual series of educational budget and tuition open forums for students and employees.





Improved capital project lifecycle management

In FY19, University Facilities, Infrastructure and Operations (UFIO) updated its **ten-year capital forecast**, a 10-year rolling plan that supports OSU's vision, mission and strategic plan and includes all planned buildings and infrastructure projects with a budget of over \$5 million. The forecast compiles estimated budgets, funding sources and timelines. Over the past year, UFIO **clarified how and why projects were added and dropped from the forecast** and brought transparency to the capital improvement process at OSU. To be included on the 10-year forecast, specific projects are vetted by stakeholders to ensure they meet a set of criteria. Then, the university's Infrastructure Work Group evaluates how well proposed projects would support the university's strategic goals. The 10-year forecast is not set in stone, and all capital projects undergo review by the Board of Trustees before they advance to construction.



“Stage gating” capital project construction allows for Board-level oversight and timely progress

At its October 2018 meeting, DFA staff proposed that the university’s Board of Trustees adopt a new multi-level approval process for capital building and improvement projects with budgets over \$5 million. Rather than approving an annual plan for capital projects each year as in the past, this new Board policy **established standardized construction phases and points for Board approval**. With major projects, it takes a great deal of planning and design to reach a point of certainty about the project details and budgets, and then a go/no-go decision must be made. The new stage gate approval process improves the accuracy of final project budgets, provides for earlier identification and mitigation of risks, and allows the Board to have appropriate oversight over large project budgets without impacting project timelines.

All major capital projects begin with approval by the vice president for finance and administration to enter the programming stage, where building and user requirements are determined, and preliminary cost estimates begin. Board review begins near the end of the schematic design stage, once the initial building drawings, floor plans and site plans have been created. In the design development stage, schematic designs are expanded to include construction details like specific materials, equipment and systems. Compliance with construction codes and university standards is ensured, and project costs are solidified. The Board of Trustees provides stage gate approval at the end of this phase, before the project can move to the construction stage, where the university conducts a bidding process to procure labor and materials from contractors. At this point, the building scope and budget is finalized and construction begins—typically a two or three year process in itself.

Infrastructure Planning Reports

University Facilities, Infrastructure & Operations expanded the concept of long-term maintenance planning to include campus infrastructure beyond buildings by implementing Infrastructure Planning Reports. These plans are designed to cover the maintenance and stewardship of assets like the university’s steam lines, roads, sewer systems and parking lots, and more. A collaboration between Capital Planning, Design and Construction and Facilities Services, the Infrastructure Planning Reports allow teams to more proactively plan and monitor the health and usability of the basics that the OSU community needs to function.

Strategic Treasury Management

OSU’s Treasury Director oversees the university’s investments, cash management and debt through the Internal Bank. Through its policies and practices, the **treasury helps reduce risk and provide the necessary long-term stability** the university needs to plan and execute its strategic initiatives. The Internal Bank is managed by Treasury to ensure that the types of capital projects the university borrows money to build meet certain criteria. The bank’s funds are used to pay the debt service (interest) owed on credit facilities. At the same time, the Internal Bank’s cash reserves are managed to balance the need for long-term investment returns with short-term liquidity.

In FY2019, the Board responded to recommendations from staff to update the university’s investment policy to allow more flexibility in investing OSU’s different types of funds. The policy maintains a conservative approach to investing and is designed to minimize short-term volatility and maximize returns. The recent policy updates allow the university to invest unspent bond proceeds separately from other university funds, as well as invest up to 5% of its operating funds in equities.

In FY2019, the Treasury Office and the Office of Budget and Resource Planning updated the university’s financial modeling software, which offers a dynamic method of predicting the financial impacts of different decisions, investments, and management circumstances, such as different enrollment levels.

OSU issued its largest-ever general revenue bond

As part of the university’s approach to strategic treasury management, the OSU Board of Trustees approved in January 2019 the **issuance of OSU-paid revenue bonds of up to \$140 million to fund a number of planned major projects** over the next several years. The ten-year capital forecast estimated the need for about \$218 million in bond debt over ten years. By authorizing a larger proportion of the overall amount now, the university will save on total costs and lock in today’s low interest rates.

OSU’s treasury director, together with the vice president for finance and administration, worked for several months in advance of the bond sale, leading a university-wide effort to document OSU’s financial stability and strong management of public resources for the university’s bond-rating agency. Once the quality of OSU’s bonds was established, the OSU team worked with a set of banks to generate interest among bond investors. There was a lot of enthusiasm, and OSU’s bonds sold on the market at a blended rate of 4.03%—the interest rate that OSU will pay to investors until the bonds mature over 33 years.



Clear policies, Efficient Processes

Since 2016-17, all the division's units have put a clear emphasis on refining and designing streamlined processes, automating them where possible. Units are also updating policies so they better support the needs of all of OSU's stakeholders in today's increasingly complex higher education environment. Efficient administrative services help advance OSU's goal to provide transformative education that is accessible to all learners by keeping costs as low as possible. The systems DFA units have been implementing and the resulting data analyses are starting to transform the way business is conducted at OSU. There is more to come.

Beaver Works (Business Operations Project) project defines and refines our work

The **Beaver Works project**, which is a product of the Business Operations Review completed in fiscal year 2017, is a **systematic process of evaluating and improving business operations**. In its early work, the core project team broadly engaged with stakeholders to create a roadmap for reaching desired outcomes. The team's first big milestone was the development of a comprehensive inventory of DFA business operation functions, informed by employees across the division and the university. Then they hosted focus groups sessions for 285 faculty, staff and other stakeholders to provide input about different functional areas.

Throughout 2018-19, the core project team worked with Dr. Javier Calvo-Amodio, an OSU associate professor and expert in systems engineering, along with his research team, to complete that inventory and data collection work and then analyze the resulting data. The information was categorized by work that is unique to certain business units and those tasks that are commonly shared across different work groups, and will be used to define standardized roles and generate ideas about better ways to organize operations.

In the coming year, this data will inform leadership decisions about project priorities, process improvement needs, information technology solutions and organizational design. Travel and business analytics are two major areas identified for business process improvement efforts in FY20. Dr. Calvo and his team were also able to utilize the Framework for Success and the Beaver Works project in their research, **resulting in the publication of a scientific paper in the field of industrial engineering and human activity systems**.

Ongoing improvements to systems efficiency and user experience

Launched in August 2017, the **BennyBuy eProcurement system** has become fully integrated as the university's procurement and accounts payable system. In 2018-19, the support team **focused on reducing the number and complexity of administrative processes**. They were able to drive cost savings by increasing the number of purchases made through the system. At the end of fiscal year 2019, there were 1,840 distinct users—double the number of the prior year. Invoices are also paid through the system, with business centers expanding the number of invoices processed through the system to nearly 70%, as of the end of the

fiscal year. Usage of the automated invoicing feature in BennyBuy is also increasing; now nearing 30% of the total. The BennyBuy team also implemented a new training program, which allows employees to sign up for personalized training sessions offered on a weekly basis. In spring 2019, PCMM added a Total Contract Management (TCM) module to BennyBuy, making it possible for staff to submit contract requests through the system, better track the progress of their contracts, and receive automated status updates. The TCM module also houses completed contracts and related documents for convenient access.

Benny Hire for Graduate Assistants, a collaboration between the University Human Resources and University Information & Technology, was implemented in March 2019. With an average of 2,529 graduate students employed across the university each year, it was critical to **improve efficiency, transparency and consistency in how people are recruited and hired**. This project streamlined the hiring process, reducing the number of steps from approximately 30 to 8. It also reduced the number of systems and screens that liaisons and human resources employees must interact from six to one. Benny Hire was integrated with existing OSU systems (including Banner, Nolij, DocuSign and the Extended Reference Check system). It also has a user-friendly request form built with business logic and electronic routing, and allows users to review the status and progress of each hire through a dashboard. Since the launch, the project team has been making continuous improvements to the user experience. An updated hiring system for hourly undergraduate student employees (averaging 8,330 appointments each year) is being developed for release in FY2020.

A new online certificate of insurance request process was implemented in September 2018. Risk Services **made requesting a certificate of insurance much faster and more user-friendly**. A certificate of insurance is a document that serves as evidence of insurance coverage; it outlines who is insured, the type of insurance, limits of liability, and effective dates of coverage. Certificates of insurance are often required by outside parties with whom OSU contracts (for goods and services, space use for events, leasing real estate or renting equipment, grants) to verify that OSU has the insurance required in the contract. Employees all across the university request certificates of insurance, and an average of about 350 are produced annually. Moving away from a paper-based process, Risk Services developed this online tool to increase internal efficiencies as well as improve the experience of users in the university community.

New Fiscal Policy Program is refining policies and rules

The new Fiscal Policy Program was created to update and develop division policies to provide effective guidance for compliance purposes, while also being flexible enough to provide for day-to-day operational needs across the university. The Fiscal Policy Committee (FPC) is **systematically evaluating and refining division fiscal policies and department rules**, which have a big impact on how the university operates. The program has a designated fiscal policy officer and an executive oversight body. Each business center now has a designated policy coordinator with the training to effectively interpret policies related to the activities of colleges and departments. They can also coordinate policy reviews when issues arise.

The Fiscal Policy Program was launched university-wide in the fall of 2018, an outcome of previous work done by a dedicated “lean process” team and the Fiscal Policy Committee, made up of members from across the university. During 2018-19, the FPC developed and implemented a new university policy for Fiscal Policy Program Authority, four fully standardized financial policies/rules and various policy revisions. In addition to policy work, the FPC deployed a new comprehensive website, restructured the fiscal policy manual, enhanced employee resources and developed new process standards.

This program has created a more collaborative and transparent environment, allowing DFA units to be more responsive and supportive to the different needs of OSU community members, and providing a system to make operations more efficient. It advances the goals of the DFA by focusing on the highest levels of service and ensuring good stewardship of OSU’s financial resources.

Implemented new university-wide procurement standards

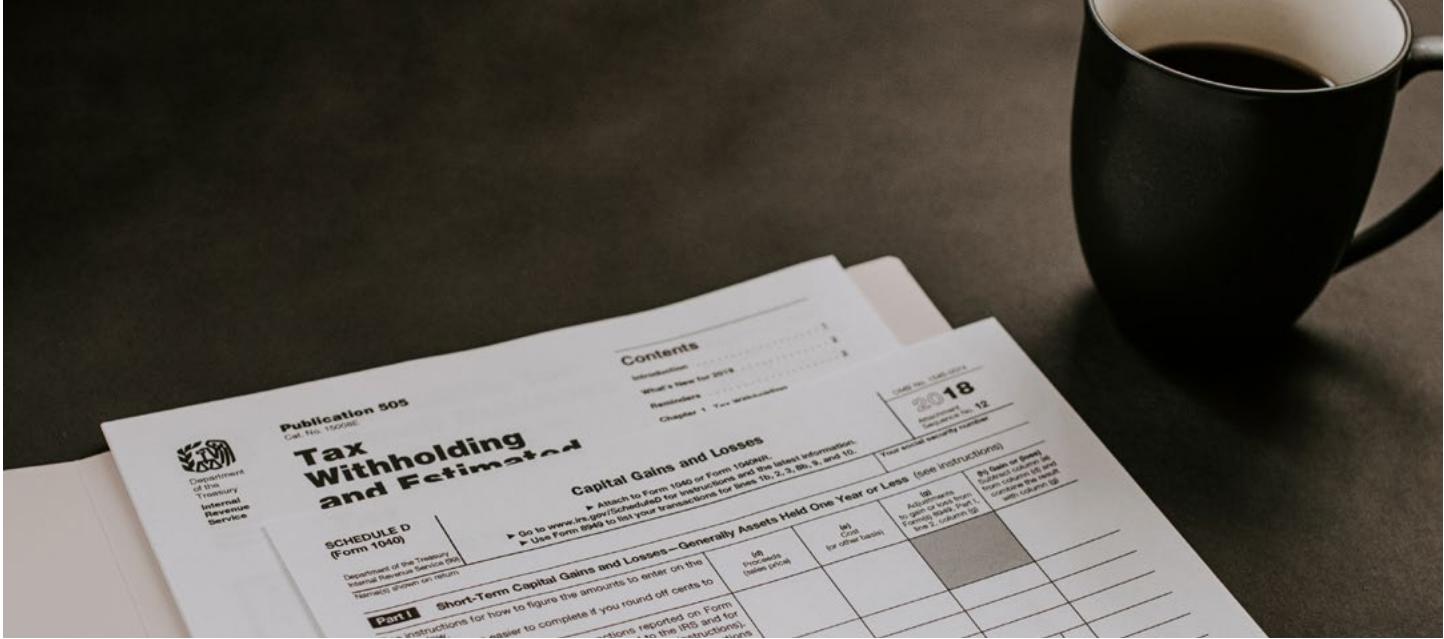
A team at Procurement, Contracts and Materials Management (PCMM) worked closely with the University Policy and Standards office over fiscal year 2019 to **revise OSU’s Procurement Standards** to provide more flexibility and simplicity in OSU’s purchasing process. The new rules were adopted in January 2019 and align with updated federal Uniform Guidance Procurement Standards.

The update included several changes that may significantly impact employees who purchase goods, services and construction-related services to support university operations.

Full details of the Procurement Solicitations and Contracts Standards and Procurement Thresholds and Methods Standards can be found on the University Policy website.

- The formal procurement threshold for non-federally funded procurements increased from \$150,000 to \$250,000. The formal procurement threshold for federally funded procurements remains limited at \$150,000 in adherence with the Uniform Guidance. This is beneficial because it is no longer necessary to go through the more prescriptive and time consuming formal procurement process for most purchases.
- Informal solicitations valued between \$25,000 and \$150,000 (federally funded) or \$250,000 (funding sources other than federal) can now be done by any staff member ordering goods or services (except construction purchases). OSU employees no longer need assistance from PCMM procurement staff to develop a request for quote or proposal and advertise before awarding the purchase. Now, purchasers can simply obtain competitive quotes, comparisons or proposals from at least two sources and submit the purchase request in BennyBuy using the proof of competition form.
- OSU’s previous Construction Retainer Program has been replaced by the Reserve Contracting Program, which includes significantly increased purchasing thresholds and simplifies the process for OSU employees.





Controller's Office: FA&A's clean processes protect the university's fiscal health

Financial Accounting and Analysis (FA&A), a unit of the Controller's Office, continues to protect the university's financial health through its high standards for accuracy and stewardship. This office quietly completes a number of critical tasks each year that support the university's ongoing operations, research funding, and compliance functions.

FA&A is responsible for producing the university's financial reports, which underpin the public's trust in our institution. For the fifth straight year, the university's **external auditor of financial statements had an unmodified audit opinion**, a positive outcome that indicates OSU's careful attention to financial rules and laws. In fiscal year 2018, the auditors also gave OSU zero recommendations for improvement, suggesting that the university is meeting high standards for financial performance.

Over the last year, FA&A worked closely with the Fiscal Policy Committee to **revise the Relocation Reimbursement policy** and the Communications Allowance policy, making them clearer and easier to understand. During a time of changing laws, the team established a process for documenting the university's fiscal policy and tax research interpretations and conclusions, which is necessary to support OSU's compliance with the legal and regulatory provisions that govern the university.

The office of FA&A undertook great effort in FY19 to **implement requirements of the new national Tax Cuts and Jobs Act (TCJA) legislation**, which had a range of impacts on university

employees, donors and other stakeholders. As part of the implementation process, the team worked with Transportation Services to utilize a new tax exemption that contributed to OSU's receipt of **tax refund exceeding \$85,000**. FA&A also researched updated IRS regulations to provide advice about tax impacts on college and department activities.

Another significant project for FA&A in FY19 was the **successful negotiation of OSU's federal Facilities and Administration (F&A) rate**, in collaboration with the Research Office and other university stakeholders. The federal F&A rate, updated every four years, is a fee charged by the university as a percentage of federal research grants to cover OSU's indirect costs that support research activities, such as costs for utilities and building space. The baseline data collection, analysis and rate development process requires sophisticated software called the Comprehensive Rate Information System, which helps staff properly categorize costs related to grants to meet federal requirements. It takes over a year of effort by Controller's Office staff, with partnership from the Office for Sponsored Research & Award Administration and OSU's Space Management team to develop the university's F&A proposal. This year, the team secured a **1.5% increase** in the rate over the next four year period.

In the midst of all this activity, the office of FA&A kept up with its regular work: During FY19, it reviewed and processed over 1,500 fee proposals through the University Fee Committee; inventoried 6,162 capital assets and set up over 1,171 new personal and real property assets.

Critical Training & Development

The Division of Finance and Administration is responsible for providing a broad range of training opportunities to the OSU community, spanning everything from how to protect people's safety to how to be a better manager. DFA units are also responsible for ensuring that division employees are provided with the training and professional development they need to provide excellent services and support to the university community. Such training supports OSU's goal to create a culture of belonging, collaboration and innovation by providing for the long-term safety and success of faculty and staff.



University-wide delivery of critical trainings

Human Resources launched a series of **online critical training modules for faculty, staff, student employees and graduate assistants** starting in spring 2018. These required trainings address the university's commitment to ensure a healthy, supportive and safe environment for all faculty, staff and students. Developed by experts at OSU, the training modules highlight our shared commitment to the community's well-being.

Initial training topics included Ethics, Mandatory Reporting of Child Abuse, Protected Leave and Information Security. In April 2019, the Equal Opportunity & Access module was released, which addresses Title IX, sexual harassment prevention, and the protections and prohibitions of the federal Americans with Disability Act. As of October 2019, the completion rate for faculty and staff across all five modules was 78%. The completion rate for student employees across all five modules was 56%.

Department of Public Safety offers specialized and customized training opportunities

Department of Public Safety officers frequently make presentations to work teams, groups and clubs across the OSU community. Chief Suzy Tannenbaum is able to customize

programs to meet the unique needs of each group. Common topics at group safety trainings over the past year included active shooter survival, safety planning, and security surveys of various spaces. DPS has provided over 50 classes and trained over 2000 students, staff, and community members. In FY2019, they partnered with the Memorial Union staff to develop its new safety team and provided them with training in de-escalation techniques and active shooter survival.

DFA hosts Training Days for OSU staff, faculty and researchers

The Human Resources Center for Learning & Organizational Development hosts OSU's annual Training Days event. Over 600 university employees registered for the November 2018 event, where 84 informative sessions were offered. **Training Days has expanded over the last two years to include presentations not just by DFA units, but also a broad range of topics of interest to academic faculty.** The 2018 event included sessions on strategic planning, the use of various technical tools, emergency preparedness tips, how to support students with different needs, conducting technology transfers for researchers, and many more subjects.

Safety & Readiness

At Oregon State, it is everyone's responsibility to help keep the entire community safe. In the Division of Finance and Administration, several units work together make sure the community has access to the information, training and support resources they need. These units are increasing the university's capacity for strategic and proactive approaches to mitigating risks, making it possible for members of the OSU community to focus on advancing their goals.



Major focus on emergency preparedness across OSU

In 2018-19, DFA units—Environmental Health & Safety (EHS), Emergency Management, Risk Services and the Department of Public Safety (DPS)—led a push across OSU to better educate the community on how (and why) to prepare for a range of emergency situations. And they developed a range of tools, trainings and other resources to help the OSU community fulfill their planning needs. A few of these activities are highlighted here.

Creating emergency operations plans specific to each unit's circumstances

Last year, the Emergency Management team **supported more than 110 colleges, departments and units in developing and communicating their own emergency response plans**. They also assist units in updating their emergency operations plans every three years. The emergency plans follow a standardized template. This consistency and common language help employees, wherever they may move around the university, to maintain a baseline level of knowledge about emergency response protocols.

Expansion of OSU's Emergency Operations Center

In early 2019, Public Safety and Emergency Management repurposed space in Cascade Hall to expand the OSU Emergency Operation Center (EOC) from 382 square feet to 530. With the update, OSU now has an **EOC that is always in standby mode, ready to activate when an incident occurs**. When not in use, the space doubles as a conference room.

In 2018, membership of the Incident Management Team (IMT) was expanded in accordance with national best practices. The team participates in quarterly “tabletop” drills designed to reproduce the experience of managing an actual emergency. With the team’s expansion, it became apparent that they were working in a space inadequate for the staffing and equipment (such as telephones, computers, and information display boards) required to coordinate the university’s emergency response and related communications. The IMT now has a more effective and functional base for emergency operations.

Development of OSU's first-ever Natural Hazards Mitigation Plan

In FY2019, the Emergency Management team completed OSU’s first-ever natural hazards mitigation plan. It uses scientific analysis to consider how our region’s potential natural hazards—earthquakes, wild fires, snow storms, tsunamis—would impact

each of OSU’s building and infrastructure elements. The plan **identifies the future work actions needed to reduce or mitigate the hazard threats**. Each building and infrastructure element is assigned a numerical risk value to make it possible to compare and prioritize needs for widely different structures. As a result of data analysis, the plan prioritizes how the university’s capital renewal money should be spent and determines when it is better to demolish structures instead of investing in updates. The plan provides data that helps OSU explain its capital development plans to Oregon legislators and the Board of Trustees. Having a formal plan also makes the university eligible to apply for post-disaster money, if necessary, from the Federal Emergency Management Agency.



Full scale command team training

About every three years, OSU’s Emergency Management team hosts a major full-scale command team training where **first responders come together to practice reacting to major emergency events**. In August 2018, the **exercise included over 160 people** from Oregon’s National Guard Civil Support team, state and city police and fire personnel, and first responders from OSU. Over the course of one day, they completed four different emergency scenarios that included issues like active shooters and a radioactive bomb device, which occur during an imaginary Civil War football game in Corvallis. Participants worked in a real-world environment **with the assistance of about 300 volunteers**. The full-scale command team trainings provide an important opportunity to practice coordinating an organized response among diverse emergency partners, including OSU departments; local 911 dispatchers; Oregon State Police’s SWAT and explosive device teams; Benton County; the City of Corvallis and others. As a result of the exercises, stronger partnerships emerge among the agencies, improving response times and capabilities.

Environmental Health & Safety increases support for more OSU locations

Environmental Health & Safety continues to **expand its customer service and compliance support to OSU's satellites and research station facilities** beyond the Corvallis campus. In FY19, these services included:

- Institutional Animal Care & Use Committee (IACUC) site inspection team visits
- Occupational safety assessments
- Hazardous waste pickups
- Industrial hygiene reviews for residences and other spaces
- Communication with the Research Station Architect on project designs
- Phase I environmental reviews
- Safety Purchase Assistance equipment reviews
- Drinking water testing
- On-site water well and system evaluation
- Respirator fit testing
- Laboratory coat ordering
- Nuclear gauge monitoring



Leading a collaborative response to major fire damage in Burt Hall II

In November 2018, a fire originated from a scientific microwave in a laboratory in Burt Hall II, requiring students and employees to evacuate the building. Though the fire was limited to one room, smoke and water caused **significant damage throughout the building, halting research** in several analytical laboratories and contaminating high-precision equipment and peripherals. Offices and labs were no longer accessible, requiring temporary relocation of the building's occupants. The effort to respond to, remediate, and recover from what has turned out to be **the university's largest property and business interruption**

claim is broad and ongoing. Reconstruction of the building will proceed under the emergency provision of the Board of Trustees' capital project approval policy, and is expected to be completed in spring 2020.

Multiple departments across DFA quickly responded to support Dean Roberta Marinelli and the students and faculty within the College of Earth, Atmospheric and Oceanic Sciences. Significant efforts were made by CEOAS staff, Facilities Services and EHS to determine **immediate relocation** needs, provide needed building access, and address safety concerns. Staff from the college, University Facilities, Infrastructure & Operations (UFIO) and Risk Services worked together with the **remediation** company, Belfor, to address water extraction and drying, smoke and soot removal, cleaning of electronics, and moving, cleaning and boxing of building contents. During this phase, the university team spent significant time working with Belfor, building consultants, electronic consultants, and insurance claims adjusters.

CEOAS and UFIO collaborated on plans to design and **build out temporary lab** spaces, working to reduce the lost time of researchers and get them operational again. Business Centers, particularly the FOBC and UABC, provided extra support to impacted CEOAS staff and assisted with procuring and purchasing replacement items, equipment, electronics, and services. Procurement, Contract and Materials Management helped to expedite required contracts for goods, services and construction. Staff from Financial Accounting & Analysis and Budget & Resource Planning supported funding needs outside of insurance coverage and contributed to decisions related to accounting, fixed assets and inventory management. UFIO is leading the design for the **reconstruction of Burt Hall II**, collaborating with CEOAS leadership and University Information and Technology for network connectivity in the temporary spaces, as well as supporting restoration of IT services to the refurbished building.

The DFA benefited from the talents of a project manager established in the College of Business to coordinate, track and document the many moving parts of the recovery effort. This included working with Risk Services and Procor (a claim services company) to prepare support for the university's insurance claim, which is still in process. There has been a **great deal of collaboration and teamwork** between employees and stakeholders across the OSU community, who have dedicated months to working through the consequences of this unfortunate accident.

University Risk Management: Improving Lab Safety

Identified as a university-level risk for awareness and oversight by the Board, the DFA has implemented a number of programs and processes to improve outcomes for safety of students and faculty researchers. These are some highlights of the progress the Environmental Health & Safety (EHS) team oversaw during FY2019:

Increased inspection frequency and risk assessments in labs

Beginning January 2018, EHS **increased the frequency of lab-safety assessments across campus from 25% to 62%**.

This was achieved by developing a revised 18-month lab-safety assessment schedule. Workplace inspections help avoid incidents, injuries and illnesses. Through a careful examination of the workplace, inspections help to identify and document hazards for corrective action.

Fume Hood and Safety Shower testing program

In January, the EHS team **developed a new fume hood testing procedure and implemented an enhanced testing schedule**.

Compared to 2018, this new procedure is projected to increase testing in 2019 by 38%. 408 fume hoods have been tested since the program began, and the team coordinated repairs with Facilities Services for the 8% of fume hoods that were identified as not working properly. Fume hoods are often the primary control device for protecting laboratory workers handling hazardous materials, so it is important that university personnel ensure their proper maintenance and use.

Increase in hazardous waste pickups

There were **1,250 hazardous waste pickups in 2018-19, a 15% increase** over the prior year. This indicates that Principal Investigators and research personnel are holding less waste in labs, better ensuring safety and compliance.

Biohazard Lab Risk Ranking

In the past year, significant progress has been made in **ranking biohazard laboratories according to risk-based criteria**. This risk ranking is used to inform inspection frequency as well as provide a quick reference resource for Occupational Medicine and other stakeholder units that interface regularly with the Biological Safety Officer. Within EHS, this risk ranking extends and complements the broader Laboratory Safety Program risk assessment project.

EHS Vivid/Bridge Training for Lab Safety

In FY19, OSU joined the Online Safety Association, giving the university access to quality online training for Laboratory Safety, with the goal of advancing the safety of the OSU community. To date, **approximately 500 laboratory personnel at OSU have taken the mandatory lab-specific trainings**. The association was developed by Vivid Learning Systems in collaboration with colleges and universities throughout the U.S. to deliver safety and health training at colleges and universities. The cost-effective training courses are designed to build safer working behaviors through interactivity and engagement methods that have a long-lasting impact.

OSU implemented the Laboratory Safety training series in July 2019 using Vivid and Bridge Learning Management System technology, which offers significant improvement over the previous applied training method. Using the Vivid system, EHS can create and manage training more effectively with fewer resources, and without the expense of hiring an in-house training officer. This new training also provided OSU with a rapid solution in response to OSHA regulatory training requirements. Over the next fiscal year, the online safety training modules will be expanded to cover other functional areas such as facilities maintenance, with topics such as electrical safety, hearing conservation and machine guarding.





Zero deficiencies identified during safety regulator inspections

In June 2019, the Oregon Department of Environmental Quality (ODEQ) conducted an unannounced hazardous waste inspection at OSU's Corvallis campus to determine compliance with relevant state and federal regulations. After finding no deficiencies, the ODEQ inspector complimented OSU's Hazardous Waste Program and facilities. During university-wide inspections of laboratories, some minor issues with labeling and open containers in labs were noted. However, the most important outcome was the **substantial progress noted since the university's last EPA inspection** in 2013.

Revival of the Department Unit Safety Coordinator seminars for the OSU community

Environmental Health & Safety revived its sponsorship of regular Department Unit Safety Coordinator (DUSC) seminars in May 2019. DUSC **seminars are used to inform campus representatives about important safety topics, including**

laboratory safety. In addition to providing a forum for networking with other department safety coordinators, the group discusses compliance issues and other educational topics. These seminars are used to help bridge informational gaps and allow DUSC representatives to interact with their community peers.

Achieving the best safety and health outcomes requires broad commitment and involvement from community members. DUSC representatives serve a very important role with coordination of safety, health, and environmental programs on campus among OSU employees. They assist deans, directors, unit heads and researchers to meet their responsibilities for safety and compliance. DUSC representatives often work together with EHS to resolve various issues ranging from laboratory safety and fire inspections, to obtaining special use authorizations or hazardous waste pickups, or scheduling ergonomic evaluations.



Diversity & Respect

DFA employees work to advance OSU's goal to build a culture of belonging, collaboration and innovation. Units in the division contribute in a range of different ways, with a baseline focus on creating a diverse and respectful workplace for employees, and a welcoming, inclusive atmosphere for students.

Human Resources expands OSU's inclusive practices

The university's Chief Human Resources Officer, a member of the President's Cabinet, is responsible for delivering a broad range of quality services to the community. In 2018-19, the Human Resources team implemented new policies and practices that expand OSU's inclusive practices. The HR organization will be restructured over the coming year to provide even more desired services and consultations to the community.

Advocating for inclusive access to health insurance materials

The Human Resources Employee Benefits Team's charge includes addressing access issues for employees. In fiscal year 2018-19, they saw success in the areas of language translation and insurance service navigation. The Benefits Team demonstrated to Oregon's Public Employee Benefits Board (PEBB) the need for OSU employees to have **access to insurance materials in a variety of languages**. As a result of their collaboration, PEBB is adding three languages (Vietnamese, Spanish and Russian), as well as offering materials in Braille and large print. PEBB will also make materials available in other languages upon request.

The Benefits Team also worked with the medical carriers who provide insurance-covered services to OSU employees (Moda, Providence, Kaiser and PacificSource) **to make insurance navigation more seamless for transgender and non-binary employees**. Outcomes of this collaboration with OSU's Transgender Task Force include a new summary document with instructions on how to access specialized services with each medical provider, which is available on the Employee Benefits website.

HR and EOA developed targeted recruitment strategies

In 2018, the Office of Human Resources and Equal Opportunity & Access **piloted a collaboration to grow campus leaders' understanding** of OSU and unit-specific Affirmative Action and Equal Opportunity goals. EOA and HR met together with leaders to explain OSU's obligations and aspirations, review EOA's detailed analyses about candidate availability for OSU positions, and discuss tactics for improvement. Following initial meetings, HR Strategic Partners helped each leader develop an action plan for a recruitment and retention strategy. This program will be expanded campus-wide over fiscal year 2020, as the HR Strategic Partner program grows. HR and EOA will continue to find areas to partner in pursuit of future improvements.



Implemented OSU Veterans Preference Policy

OSU is committed to providing equal job opportunities and supporting the success of all faculty and staff, including veterans. The university's goal is to make every effort to give U.S. service veterans opportunities to secure meaningful employment at the university and advance their careers at OSU. To this end, the offices of Equal Opportunity and Access and Human Resources established new policies and procedures that **support the consideration of veterans in the hiring process**. The new hiring preference policy and procedures went into effect in June 2018 and were fully implemented throughout fiscal year 2019. This new approach supports Oregon law, which requires that all qualified veteran candidates are advanced to the first round of job opening interviews, as well as receive a preference at each stage of a search and hiring decision. Search advocates and others involved in hiring and recruitment decisions receive training on how to apply the new policy.

Contributing Search Advocates to advance inclusive recruitment practices

In October 2017, the vice president for finance and administration requested that members of the division's extended leadership team (a group of over 50 leaders, unit heads and managers) become certified as search advocates, to support inclusive search processes across the university. Use of search advocates is encouraged for all division recruitments, and the vice president mandated that all DFA searches at the director level and above require the use of a search advocate. Throughout the 2018-19 fiscal year, **an average of 80% of the DFA extended leadership team have successfully completed the university's Search Advocate training program**. As search advocates, division employees are trained to assist search committees in implementing best practices to build diverse candidate pools and reduce potential bias. Division employees are also encouraged to take classes from OSU's Social Justice Education Initiative.

Using alternative advertising methods for better candidate diversity

Traditionally, job recruiters within University, Facilities, Infrastructure and Operations placed ads in local media and trades publications to attract candidates to apply for positions in construction management, land use planning and other specialized positions. Over the past year, UFIO experimented with expanding ad placement to LinkedIn, Portland-based Mac's List, a number of free Slack communities in Corvallis and Portland and other venues **to build a more diverse candidate pool for open positions.** These efforts will be monitored for effectiveness and broadened for use in other searches as appropriate.

Networking for diversity in OSU's vendor base

In 2018-19, Procurement, Contracts and Materials Management (PCMM) continued its **efforts to increase OSU's work with diverse businesses** by attending multiple outreach events around the state. PCMM collaborated with Capital Planning and Development to represent OSU at the Oregon Public Purchasing Association Reverse Vendor Trade Show in October, the Oregon Association of Minority Entrepreneurs Trade Show in May and several of the Salem Capital Connections monthly meetings. Along with Capital Planning and Development, PCMM co-funded a silver sponsorship to support the annual Governor's Marketplace in March. Each of these venues provided opportunities to share information on doing business with OSU and for staff to learn about the goods and services the firms provide.



Lori Fulton, UFIO (left) with Christine Atwood and Hanna Emerson (right) from PCMM at the OAME tradeshow

Exploring diversity, equity, and inclusion in sustainability work

Representatives from the Sustainability Office, Materials Management, Transportation Services, and OSU units outside of DFA attended the Washington & Oregon Higher Education Sustainability Conference, which provided a variety of programming **focused on the intersections between sustainability and diversity/equity/inclusion/justice work** on campuses. OSU staff spoke in sessions relating to sustainability topics and OSU's Social Justice Education Initiative.

Materials Management employees also attended the Association for the Advancement of Sustainability in Higher Education's annual conference, which explored similar themes. One staff member participated in a day-long workshop focused on developing a social justice lens to achieve goals for sustainability.

These trainings and others pursued in FY2019 were followed by internal discussions among DFA staff members and within OSU's Sustainability Advisory Council. Outcomes from these conversations include the implementation of a graduation gown reuse program and the development of new trainings and programming that will be offered in FY2020.

Executive onboarding program supports success

Human Resources worked with the President's and Provost's offices to **launch a pilot executive onboarding program** in December 2018. The goal of this program is to better integrate new executive leaders into the university and its culture by providing them with the tools, resources, and knowledge to become successful and productive. The onboarding process starts with the accepted offer and continues through the end of the first year. Executive onboarding is personalized for the new executive and reflects the executive's needs and the unit's structure. A collaboration between the hiring manager and a group of onboarding support resources, the executive onboarding program supports long-term retention and employee engagement.

The Vice President for Finance and Administration's office developed a formal approach to onboarding during 2018-19, as it welcomed new leaders. This approach includes partnering new administrators with peer welcome ambassadors, and provides a personalized template and resources for learning about OSU in their first months. Division leaders plan to broaden this onboarding approach to other positions in FY2020.

Buildings & Infrastructure

The DFA is responsible for building and maintaining physical infrastructure that meets the needs of the community, and works to preserve OSU's history for future generations. Collaborating closely with university leaders to develop state-the-art functional spaces, DFA units are supporting OSU's goal of preeminence in research, scholarship and innovation.





Preserving OSU's physical foundation and preparing for the future

Oregon State University is 150 years old, and many of its facilities, particularly on the Corvallis campus, have significant needs for building system replacement and design modernization. The university has been challenged by historical statutory restrictions and budgetary constraints to maintain the kinds of infrastructure and facilities necessary for student and research success. The Division of Finance and Administration leadership has made a commitment to addressing these long-running challenges.

The division's **Facilities Renewal Initiative** has entered its second biennium. Projects completed in FY2019 included **replacing the roofs** on Burt Hall I and the Agricultural and Life Sciences Building, and the **installation of new mechanical systems** for Owen Hall.

Led by University Facilities, Infrastructure and Operations, OSU is committed to **reducing deferred maintenance and extending the useful life of the university's capital resources**. University leaders continue to grow OSU's building maintenance capacity by budgeting increments of \$5 million annually into a capital renewal fund, with the goal reaching \$45 million over the course of several years. OSU pairs this resource with state funds earmarked for public university capital renewal to complete a combination of small- and large-scale building renewal projects, and to demolish old spaces that can no longer be effectively maintained nor efficiently updated.

OSU's 2019 10-year capital forecast projected a **reduction of the university's deferred maintenance backlog from the current estimate of \$641 million to \$374 million by 2026**. Per the OSU 10-year capital forecast, the total net square footage of building space available on the Corvallis campus is not anticipated to increase over the decade, even as spaces are modernized.

Capital Building Projects in 2018-19

OSU is following a deliberate, long-term strategy to update its spaces for teaching, learning, research and work to meet 21st century needs for collaboration, flexibility and access to technology. These are a few of the significant projects that were completed in fiscal year 2019.

Gilbert Hall Auditoria Renovation

This \$4.3 million project updated and improved teaching space in the Gilbert Hall auditoria (rooms 124 and 224) for accessibility, improved climate control, updated furnishings and lights, and better circulation for students and instructors. The chemistry teaching lab (Gilbert Addition 209) was also updated. This renovation was completed in January 2019, in time for winter term classes.

Memorial Union Plinth Renovation

In summer 2018, the plinths in front of the Memorial Union were rebuilt, leading to refreshed entrance for this important asset to OSU. This project, with a budget of just over \$767,000, addressed cracks in the plinths to prevent damage from moisture seeping into the stairs and foundation. It was funded by the student building fee reserve fund, used for the maintenance of non-academic buildings.

Goss Stadium Right Field Balcony Renovation

Completed in February 2019, the Goss right field balcony renovation, funded by nearly \$2.5 million in gifts, was completed to improve the baseball fan experience at the field and add a concourse deck over the visiting team's bullpen. The project included an update of the Omaha Room.



Gilbert Hall Auditorium renovation



Magruder Hall expansion

HP Building 11 ATAMI Renovation

This project, budgeted at \$12.75 million, expands OSU's operations on the HP Campus into an additional 25,000 square feet. Improvements at the Advanced Technology and Manufacturing Institute (ATAMI) include research laboratories and administrative facilities. It was substantially completed in summer 2019.

Finley Hall Renovation

Finley Hall was updated over a period of two years (completed in summer 2019), with a project budget of \$10.5 million. First floor common spaces were reconfigured, restrooms and showers were upgraded, and improvements were made to plumbing and electrical systems, fire and life safety systems and interior finishes.

Magruder Hospital Construction & Expansion

The Magruder Hall project, completed in summer 2019, expanded the veterinary teaching hospital facilities and built an additional 6,600 square feet of exam rooms, kennels and wards, as well as a new linear accelerator in the oncology department. The \$13 million project budget was funded by a \$5 million gift, endowment earnings and an OSU internal loan repaid by revenue.

Advanced Wood Products Laboratory Construction

The A.A. "Red" Emmerson Advanced Wood Products Laboratory is part of the Oregon Forest Science Complex, with a total project budget of \$79.5 million funded by state bonds and gifts. The AWPL, completed in summer 2019, is dedicated to furthering research, innovation and collaboration in Forestry programs. It includes a high-bay lab with a unique strong floor for full-scale product design.

Collaboration is key to Peavy Forest Science Center construction progress

Work teams from across OSU and the Division of Finance and Administration, along with project stakeholders, continued to collaborate on the construction of the George W. Peavy Forest Science Center, which is part of the Oregon Forest Science Complex now underway. As **the schedule of the project has changed** and progressed, contributors—including staff from Facilities Services; Capital Planning and Development; Business Affairs; Procurement, Contracts & Materials Management; the College of Forestry and the general contractor, Andersen Construction—have been flexible and are working closely together to address everything from landscape design changes to fluctuating cost estimates and more. The Peavy Forest Science Center is **on track for completion in spring 2020** and will be an integral part of the Corvallis campus. Some landscaping elements of the original Peavy site, like the arboretum, are being preserved in the new designs and planting plans and will be used in teaching.

Ongoing upgrades to the OSU-Corvallis power grid

Oregon State has been partnering closely with energy supplier Pacific Power on a multi-year project to improve the safety and reliability of the Corvallis campus power grid. Over the past two years, this work has **significantly reduced the number of unplanned power outages** that, in the past, could have put research and personal safety at risk. In 2018-19 and continuing over the next few years, a series of planned, short-term service interruptions began to accommodate the necessary infrastructure upgrades.

Facilities Services, in coordination with other DFA units, plans power interruptions to minimize impacts on students, faculty and staff as much as possible. During planned outages, back-up generators are used when possible. Staff at University Facilities, Infrastructure and Operations coordinate in advance with people potentially impacted by outages and share notification emails with the OSU community. The new [**Power Grid Updates**](#) website also provides real-time updates.

Three brief planned power outages were conducted according in FY2019. As of June 2019, nine outdated oil switches have been replaced along SW Jefferson Way on the Corvallis campus. UFIO staff is working with Pacific Power to finalize an outage schedule for FY2020.



Facilities Services gets ahead of catastrophic spring rains in Corvallis

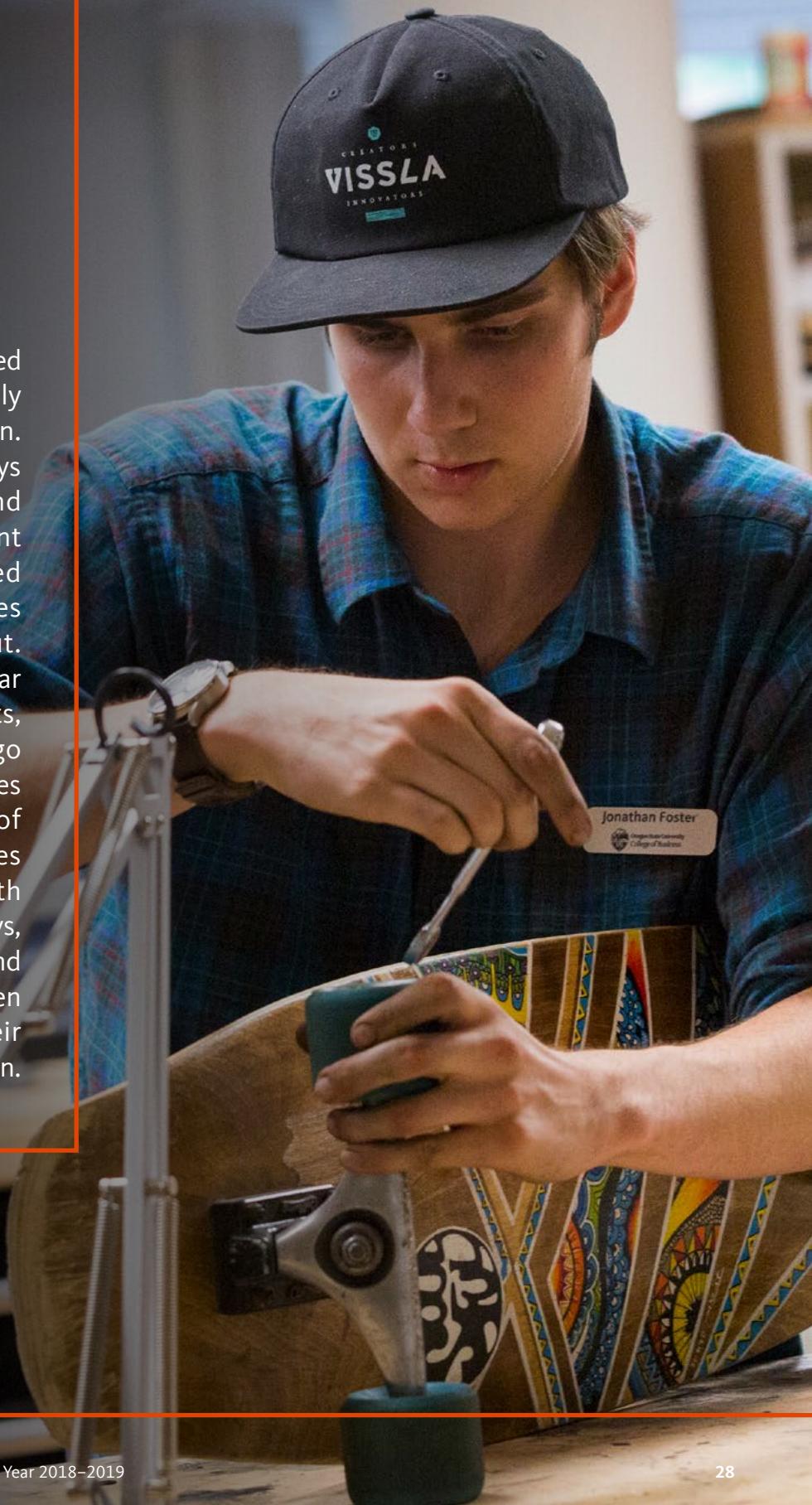
Spring rains in 2018 caused the Willamette River to flood and closed Highway 34 for three days, offering a glimpse of the wetlands that the Willamette Valley once was. Drone photos showed areas near the river completely submerged, and the research farms south of campus, such as the Lewis-Brown Botany and Vegetable Farms, had minor flooding. On the Corvallis campus, however, it was business as usual—**the impact of the heavy spring rains was minimal due to proactive work** by Facilities Services.

Heavy rain earlier in the year clogged drains with leaves and led to minor damage. After surveying the damage, Facilities Services crews moved up preventative maintenance work on elements affected by heavy precipitation: drains, storm-water systems and sump pumps used to keep water-collecting areas clear. They installed inverted drain traps designed to keep leaves from clogging some problematic drain systems, a few of which were custom made by Facilities trades welders to accommodate unique architecture. And, to make sure they continue to stay ahead of issues caused by rainy winter weather, Facilities Services recently invested in a jetter trailer, a machine used to clear drainage lines and storm water systems by blasting through blockages.

During the days of April flooding, maintenance technicians monitored campus flooding “hot spots” so they were able to call for immediate assistance to keep areas problem-free. The April flooding in Corvallis could have caused major problems on campus. Thankfully, due to some forward planning and advance work, campus operations were as safe and reliable as ever.

Supporting student success and OSU's mission

Oregon State University is committed to delivering a high-quality, globally relevant and affordable education. DFA units work in a variety of ways to support student success and OSU's mission, sharing important information, providing needed resources and promoting issues that the community cares about. While this work is part of the regular business of a number of DFA units, many individuals and teams go beyond their baseline responsibilities to participate in a range of university events. DFA employees regularly volunteer to help with commencement, athletics game days, student-move in and move out, and more. DFA staff members are driven by their personal values and their care for the success of OSU's mission.



Keeping the Focus on Sustainability

Oregon State's mission includes promoting environmental progress for people across the world. The university's Sustainability Office is housed within the Division of Finance and Administration, where it coordinates a variety of resources to support the sustainability work of students, faculty and researchers across OSU.

New requirements for sustainable development

Oregon State University recently created [Requirements for Sustainable Development \(RSD\)](#) to help accelerate progress toward OSU's ambitious [carbon emissions reduction goals](#).

The requirements provide flexibility that respects the context of infrastructure needs at OSU. While exceptions may be applied in some limited cases, following the RSD became mandatory for all OSU major and minor capital projects as of March 2019.

The Sustainability Office conducts internal audits of projects that do not seek external certification by collecting information needed to ensure the Requirements for Sustainable Development are achieved. The office [posts short narratives online](#) to provide transparency to the community.

Long-range energy efficiency improvements

In FY19, energy efficiency improvements to the heating and cooling systems at Kelley Engineering Center (KEC) were implemented using a process called retro-commissioning. Retro-commissioning is a systematic process to determine **operational and maintenance improvements to a building that will both increase occupant comfort and save energy**.

In the KEC, these cost-effective measures are expected to have a financial payback of under three years, based on energy savings alone. OSU will also benefit from significant reductions in maintenance, labor and service calls for the building. In July 2018, the KEC also received updated solar panels, a collaboration between the Sustainability Office and Facilities Services. The new solar panels help save energy by preheating water the building's hot water supply.

Minimizing waste while maximizing fun

OSU made strides toward minimizing landfill-bound waste in FY2019, building on past efforts aimed at reducing waste and disposal costs. These efforts included a range of new and traditional activities.



New solar panels at Kelly Engineering Center

- The “**All in the Hall**” classroom building recycling program was expanded to add the Valley Library, the International Living-Learning Center and Kidder Hall. This resulted in the **addition of 92 recycle bins and a 63% reduction in the number of trash bins** across these buildings. The consolidation of trash bin collection points encourages recycling, while also reducing labor and materials needed for custodial services.

- Campus Recycling partnered with University Housing & Dining Services and M.U. Retail Food Services to develop new **online training modules for student staff regarding how to properly recycle and dispose of waste**. As of the end of FY2019, all new student employees working in food services are required to complete these trainings as part of their onboarding process. This effort is especially critical because food services are one of the largest contributors to OSU’s waste streams.

- Campus Recycling took the lead in starting a **new program called Grads Give Back, which collects used graduate gowns after Commencement** and gives them to under-resourced students who need them the following year. This program, developed with the help of Associated Students of OSU and the Memorial Union staff, encourages the reuse of materials while increasing inclusion and access.

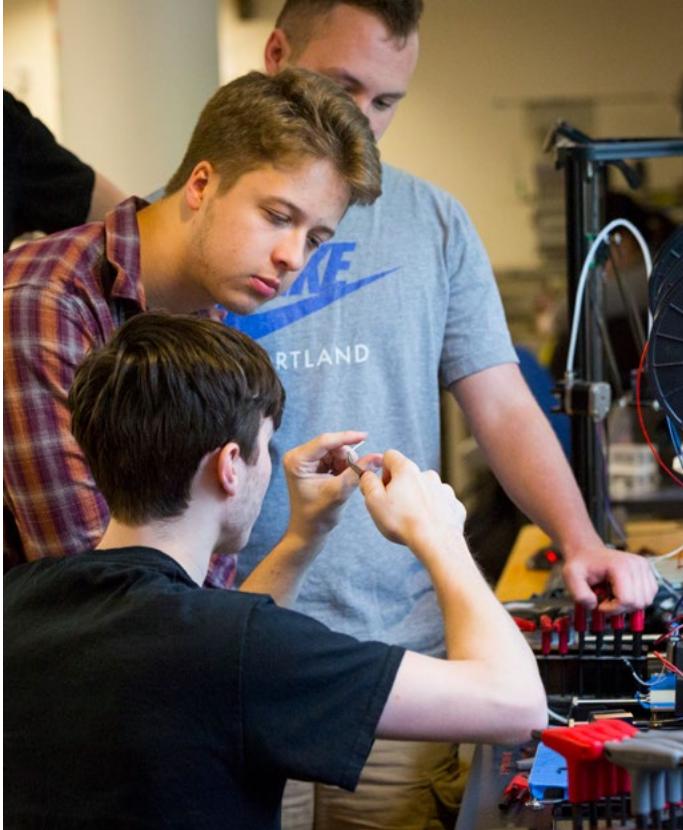
- Once again in FY2019, Materials Management worked together with University Housing and Dining Services and Community Responsibility & Belonging to host **The Great Move Out**. The event **provides services to on- and off-campus students to donate what household furnishing and goods that they no longer need** when they move out. Materials Management staff redistributes the goods to non-profit organizations in the area.

- OSU emerged victorious in the annual **RecycleMania Oregon Classic**, keeping the trophy another year and beating the University of Oregon Ducks by recycling more on a per person basis! OSU recycled an estimated 191,661 pounds of materials over the competition period. Go Beavs!

- Campus Recycling responded to changes in recycling vendor acceptance guidelines by planning and **implementing a campus-wide recycling educational campaign** in fall 2018. This included a university-wide email to staff and faculty explaining the new guidelines, as well as efforts to raise awareness through social media, presentations to campus groups, updated bin signage, sending recycle guides to every department, displaying the news on screens across campus and more. The campaign garnered over 2,000 visits to the online recycle guide and 22,000 impressions on social media.



Materials Management provides student recycling opportunities



Materials Management helps student employees broaden skills

In 2019, staff created a comprehensive new training program for student employees in Materials Management (including the Campus Recycling and Surplus Property units). The training program covers everything from driver safety to customer service to surplus pickups and more, for the roughly 40 student employees who work at the program.

Business Affairs makes it easier for students to complete degrees

The DFA's Office of Business Affairs manages student payment accounts. In FY2018-19, business teams focused on collaborating with university partners to reduce the impacts of financial challenges some students face, allowing them to better focus on their studies and successfully graduate.

Business Affairs worked with staff from Financial Aid and Institutional Analytics and Reporting to create a new report for colleges that show which students may be subject to a financial hold, preventing registration the next term. By identifying these students, along with additional data like the academic credits they have earned to-date, **Business Affairs provides an “early warning” to colleges, who can then identify options for student financial assistance**, such as completion grants and persistence scholarships.

In collaboration with the Registrar's Office, last year Business Affairs created an “Advance on Benefits” program to assist OSU students who are military veterans using the Chapter 33 benefits (post 9/11 veterans) process for reimbursement of education expenses. Because there are frequent delays for students in receiving the benefit, this new program **allows OSU to provide advance financial resources to qualified veteran students** early in each term, when they need funds for books and supplies.

In further support of military veteran students, Business Affairs also **collaborated with the OSU Beaver Store to streamline the expense billing process for veterans** who utilize Chapter 31 (vocational rehabilitation) benefits. As a result, university-related billings to the federal Veterans Affairs agency are now consolidated in Student Accounts, making things easier for all parties.

Newly-opened Student Employment Center provides dedicated resources

The new Student Employment Center, located at University Plaza in Corvallis, **helps new student employees successfully navigate the employment process** and strives to create an efficient and positive onboarding experience for student employees. Established in FY2018-19, the center's dedicated Human Resources team currently serves 65% of the student employment population on campus, providing quick and efficient hiring of student employees.

Student employees play a vital role in filling employment needs in many areas of the university and are an integral part of the success of OSU. They enthusiastically and positively contribute to the university employee culture. The Student Employment Center helps support OSU's strategic goals by providing students with:

- Employment opportunities that enhance the student development and learning experience;
- Income opportunities as part of a student's total financial assistance program;
- Co-curricular experiences by which the student gains valuable work skills.

Human Resources experts in the Student Employment Center provide assistance to many OSU units by finding qualified students to employ, posting and managing student recruitments and processing new hire paperwork. The Center will be expanded in fiscal year 2020 to incorporate all student hiring on the Corvallis campus.



Partnering with the College of Public Health on education and outcomes

Environmental Health & Safety continues to partner with the College of Public Health's Environmental and Occupational Health Division to educate and improve health and safety on campus. Masters in Public Health students enrolled in the Environmental and Occupational Health program get real-world learning opportunities. The entire Corvallis campus benefits from improved safety and health that result from student participation in a range of "hands-on" projects. In FY2018-19 these collaborative projects included:

- **Safety Stand Down** in May 2019, co-sponsored with the School of Public Health and Civil Engineering faculty to promote construction safety and fall protection.
- **Job Hazard Analysis** projects for two students, which was part of their course curriculum.
- **Industrial hygiene equipment class** hosted in the EHS lab, to educate students on application and use of occupational health monitoring equipment.
- **Biosafety Program** sponsorship, with many successful outcomes including the development of a Sharps Injure Log, Near Miss Tracking System and updated biohazard risk assessments.
- The **EHS Biosafety Officer** serves as adjunct faculty member since 2013 and teaches several lectures for various classes each year.

Promoting OSU's mission and advocating for higher education

The Division of Finance and Administration **supports the university's statewide and national advocacy efforts**. DFA leaders, with the coordination of the university's budget liaison in the Budget Office, provide information and analysis to the Oregon Council of University Presidents and the universities' Legislative Advisory Council. In this role, the director analyzes the fiscal impacts of different legislative decisions, and contributes to the universities' development of a consolidated request to the state for operations and capital funding each biennium. This office maintains an array of historical statewide data as it pertains to higher education funding, policies and laws in the state of Oregon.

Division outreach and education programs for the OSU community

Over the 2018-19 fiscal year, DFA units expanded their outreach efforts to OSU students and employees. They are raising awareness about available support services, providing updates about interesting projects, and educating people on how to stay safe. We share a round-up of some of the division's latest outreach and education efforts here.

DFA information resources expanded online, across social media and on your mobile device

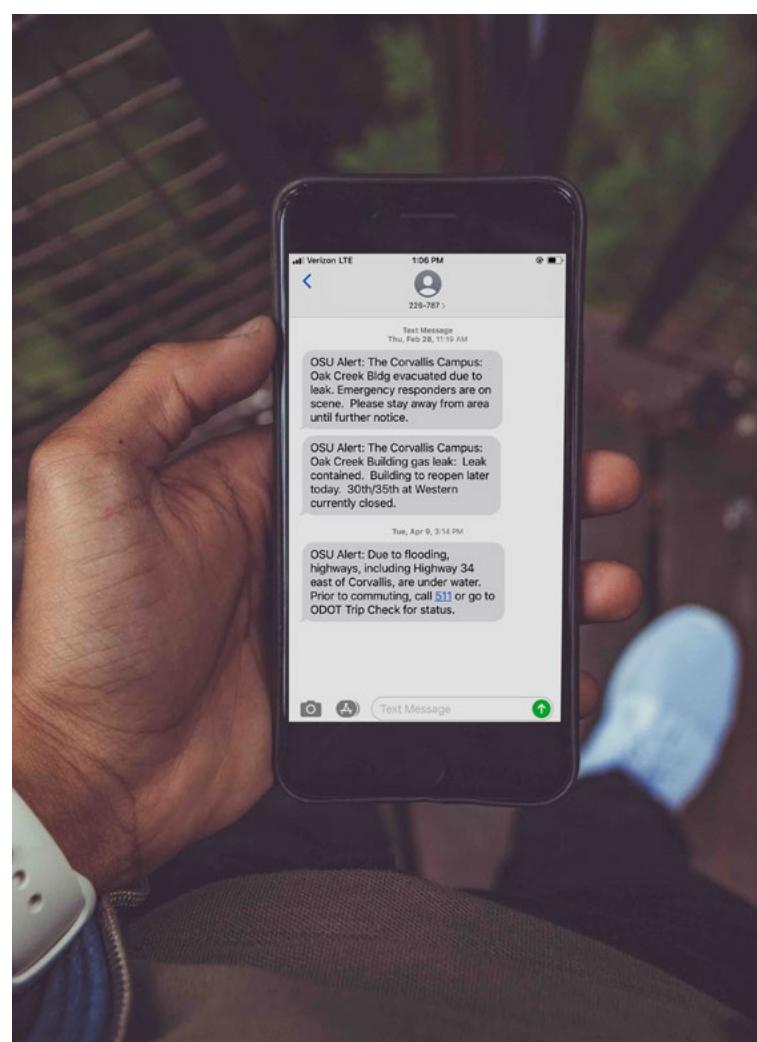
- Do you know what to do in an emergency situation? The Department of Public Safety released the [DAMSafe](#) app to give users quick guidance and links to emergency resources. It connects automatically to OSU's emergency dispatch center or 9-1-1 services. It also lets users set up "virtual" companions, so that if they feel unsafe, they can ask friends and family to track their progress around campus.
- OSU continues to provide the [OSU Alert system](#) for notifying the university community about emergency situations. Using AT&T Rave software, OSU has the capability to send text, email, phone, social media, and RSS messages to subscribers. Every OSU employee and student is automatically enrolled via their OSU email, but they need to register phone numbers online to receive texts and calls. Emergency Management also helps departments develop internal contact lists using the Rave system to alert staff and students about local incidents that affect particular buildings.
- First published in May 2019, the [Safety Beaver Buzz](#) Newsletter provides articles and information covering safety and compliance topics affecting faculty, staff, and students across the OSU campus. It is also used to announce training and seminar events held by EHS and to recognize laboratories with zero safety deficiencies.
- Oregon State's campuses are improving every day. Community members can subscribe to UFIO's [Campus Directions](#) to get a once-a-month update on how we are making our campuses safer, more sustainable and even more beautiful!
- Capital Planning & Development's [projects website](#) provides an at-a glance look at current large scale capital projects happening across OSU sites.
- Capital Planning & Development has written and published the [10-Year Capital Forecast Process](#), a guide to how capital projects are planned and implemented at OSU.

- PCMM launched a website in FY2019 to house a broad range of [eProcurement user tip sheets](#), offering quick and easy support for topics ranging from how to shop on BennyBuy to setting up new users to paying invoices.

- A full array of [risk and insurance services](#) are now accessible online, including support for international travel, filing insurance claims, special events and individual consultations.

- Sustainability at OSU manages an [email list](#) as well as accounts on [Instagram](#), [Facebook](#) and [Twitter](#). Content comes from the Sustainability Office, Materials Management, and other units within and outside of DFA. Its [website](#) consolidates information about all of OSU's sustainability activities for students and employees.

- Facilities Services expanded its communications to [Instagram](#) and [Facebook](#), to announce campus updates to the community and to promote employment opportunities at Facilities Services.



An eye in the sky toward construction projects

It is easy to stay up to date on the construction progress of new buildings and learning sites with live and time-lapse cameras available for viewing major projects:

- Keep an eye on the progress of the new Marine Studies Initiative building with this construction live-cam at Newport: <http://webcam.oregonstate.edu/msiwest>
- You can watch the building of OSU's new Regional Class Research Vessel Taani at the shipyard in Houma, Louisiana with three new webcams. Find the webcams, a video of the keel laying ceremony, and learn more about this major, federally funded project [at the CEOAS website](#). The RCRV project is supported by many DFA staff members, including teams at Procurement & Contract Services and the Forestry and Oceanic Business Center.
- The new [Forest Science Complex](#) is under construction! Learn more about the vision for the forestry and natural resources program, and watch live camera feed of this state-of-the art building project.

Budget Office educates the OSU community

In FY2019, The Office of Budget & Resource Planning broadened its outreach and community participation through the [University Budget Committee](#). Last year it established a new series of community budget forums and tuition Q&A sessions. It's now easier for students, faculty and staff to provide input and ask questions about budgeting decisions, tuition rate proposals and other fiscal planning matters.

Throughout 2018-19, the budget office hosted:

- 9 tuition forum sessions
- 15 campus budget conversations
- 12 meetings of the University Budget Committee and Tuition Advisory Council
- 12 meetings with the Student Budget Advisory Council

HR-hosted Employee Benefits Fair and flu shot clinics show great participation numbers

The 2018 Employee Benefits Fair occurred in October and featured the first flu shot clinic organized by OHR. Over the two-day flu shot clinic, vaccinations were administered to 1,097 employees, retirees and dependents. This exceeded the vaccinations administered in the past by approximately 700! Wait times for the flu shot clinic averaged less than five minutes. The OSU benefits team worked closely with staff from

a regional pharmacy, and coordinated with OSU pharmacy students, Memorial Union staff and volunteers from Payroll, Human Resources and Student Health Services to make this event a success.

Sponsoring OSU's Beyond Earth Day celebration to promote sustainability and health

In spring 2019, Materials Management and the Sustainability Office partnered with the Center for Civic Engagement to host the annual [Beyond Earth Day celebration](#), a weeklong program focused on earth ecosystems, health and wellness, viable economies, and social progress and draws attention to the interdependence of the health of humans, animals, environment, and economy.

DPS promotes safety and provides services

Department of Public Safety staff attend many community events with university partners. At these events they share a variety of public safety information, including how to use the DAMSafe app, and they promote DPS services, like bike anti-theft registration through Project 529.



Campus Public Safety Officer Brady Esch at a community outreach event

Materials Management employees Lily Butler, Taylor Munro, Parker Wright and Andrea Norris with President Ray (left) and Vice President Green (right)

DFA Awards and Accolades

Each year, division leaders and employees recognize some of their outstanding colleagues for going above and beyond in service of OSU's mission. DFA employees and teams also receive recognition from parties outside OSU for their innovation, leadership and quality of work.



2019 Division Employee Award

Recipients

Community Builder: The DFA employee who regularly provides outstanding volunteer service to the division, Oregon State University, or their local community through personal involvement.

- **Sara Bronstein**, Transportation Options Supervisor spends her free time advocating for non-motorized transportation through her volunteer work with the City of Corvallis Bicycle and Pedestrian Advisory Board, Open Streets Corvallis and the Corvallis Bicycle Coalition.

Teamwork: For two or more people who demonstrate an outstanding ability to work collaboratively on teams or between units, advancing the division's mission through effective engagement, relationship building and project support.

- **Department of Public Safety Dispatchers Stephanie Howard, Amy Johnson, Justin Lewis, Jessica Olson and Arielle Romo** worked closely together and coordinated their time to ensure 24-hour coverage of emergency calls and vital after-hours campus services.

Outstanding Student: A student employee in the division who demonstrates dependability, self-motivation, and a commitment to excellence in achieving unit goals. Two winners were recognized in 2018-19.

- **Colin Joseph**, recycling and surplus operations in Materials Management, is well known for his positive attitude, self-motivation, and ability to handle nearly every job in the department. He is a peer trainer and volunteers his skills for extra events.
- **Parker Wright**, a Student Recycling Program Assistant in Materials management, is collaborative, efficient and detail-oriented. He helped plan and lead student-centered programs like "All in the Hall" recycling at Valley Library, the Grads Give Back recycling program and the 2018 Beyond Earth Day Community Fair.

Customer Service: A person who provides outstanding customer service, and consistently goes beyond job expectations to help students, faculty, staff and community members.

- **Justin Fuszek**, a Building Controls Technician with Facilities Services, has received a number of accolades from campus partners about his responsiveness and skills in keeping students, faculty, staff and animals safe and comfortable. He turns customer feedback into ideas for improvements that benefit the OSU community.



Innovation: A creative problem-solver who demonstrates the ability to collaborate to achieve desired outcomes, while keeping in mind the division's overall goals and resources.

- **Cindy Draper**, Fiscal Policy Officer in Business Affairs, was commended for her ability to bring together diverse stakeholders to collaborate on optimal solutions. She created a systematic structure and outreach protocol for the newly formed Fiscal Policy Committee.

Leadership: A person who demonstrates commitment to the DFA mission and objectives, displays a high degree of integrity in supporting the organization, and offers extraordinary support in the guidance and education of colleagues.

- **Andrew Gray**, a Construction Shops Manager at Facilities Services, is known for his collaborative, problem-solving spirit, his high standards for doing a job right, and his ethics and integrity. He leads through coaching, feedback, mentorship and by modeling high standards for professionalism.

DFA All-Star: A DFA employee whose achievements transcend all the other award categories. This person demonstrates an ongoing commitment to the university's core values, including accountability, diversity, integrity, respect, and social responsibility. They regularly go above and beyond expectations while performing their job duties.

- **Steve Schofield**, the Maintenance Labor Coordinator at Procurement, Contracts and Materials Management was recognized for his broad commitment to service, stewardship, and safety and health. He demonstrates extraordinary customer service skills and resourcefulness, and was recognized for his strong work ethic, leading with a "can-do" attitude, and his willingness to help out with any job. Steve is known as a knowledgeable, friendly and helpful problem solver.



External recognition of outstanding performance

The nation's #5 Top Safe Campus

The National Campus Safety Summit ranked Oregon State University at #5 on its [2018 Safe Campus Top 25 list](#). Chief of Public Safety Suzy Tannenbaum cited the increased outreach work of DPS staff to promote safety awareness and resources and the participation of the entire OSU community as key to receiving this recognition for the first time.

OSU is designated a Tree Campus USA for the 11th year

In 2018, Oregon State was recognized by the Arbor Day Foundation as a Tree Campus USA. The university's landscaping crew (pictured), part of Facilities Services, accepted the award for OSU.

For the 11th year running, the Facilities Services team met the foundation's five standards for excellence: (1) They convened a tree advisory committee that includes students, faculty, facilities staff and community members. (2) They developed a campus tree care plan and work to educate the community about the importance of protecting the campus forest. (3) They maintained a detailed campus tree program with a dedicated budget. (4)

They sponsored the university's annual Arbor Day events, encouraging volunteers and active participation. And, (5) they offered a service learning project as part of their community outreach work, which provides students an opportunity to learn more about the importance of healthy trees in our environment.

Oregon State Treasury's Gold Star Certificate

Oregon State University received the State of Oregon's Gold Star Certificate for its work in fiscal year 2018. **Mark Fryman and the Financial Accounting & Analysis team** (part of the Controller's Office) were recognized for providing accurate and complete fiscal year-end information to the state treasury in a timely manner. This award is a challenge to earn. The achievement is due to the team's diligent efforts to maintain accurate and complete accounting records throughout the year.

College of Business Innovation Award

In fiscal year 2019, **Lissa Perrone, Director of Business Affairs**, was awarded with the College of Business Partner in Innovation Award. Former dean Mitzi Montoya recognized Lissa's responsiveness and problem solving, as she found a way to provide better and faster financial support to students during fall registration. Dean Montoya said the effort supports the college's strategic initiatives to promote student success and achieve distinction.

Director of OSU Extension's Coin for Excellence

Michelle Lopez, a human resources consultant, received the OSU Extension Director's Coin for Excellence. The award recognizes personnel, partners and collaborators who display excellence in support of its mission. Michelle received the award for her outstanding customer service, responsiveness and unfailing kindness in working with others. Michelle routinely travels to distant county extension offices to provide personalized HR support services.

OSU Libraries Committee's Choice Award

Shane Melton, a finance coordinator with the University Administrative Business Center, received the OSU Libraries Committee's Choice Award in spring 2019. Shane was recognized for his ongoing work assisting the University Librarian and the libraries and press leadership team with budget planning. They appreciate Shane's responsiveness, friendly customer service, and his ability to explain complex fiscal concepts in simple-to-understand terms.



Shane Melton receives award from University Librarian Faye Chadwell

About the Division of Finance and Administration

In fiscal year 2018-19, the vice president for finance and administration completed an organizational update of the division with the establishment of a senior leadership team. This group oversees the major components of the DFA's broad responsibilities, and coordinates to advance division-wide goals. With the full leadership team in place, the division has been working to build tools and systems that provide for improved collaboration and communication between DFA units and our community partners.

New leaders join the DFA

- **Paul Odenthal** joined OSU in May 2019 as the DFA's senior associate vice president for administration, responsible for providing effective leadership and oversight for facilities, capital planning, transportation, public safety, risk services, environmental health and safety, and information technology. The SAVPA is also empowered to act on behalf of the vice president in his absence. Emeritus Dean **Ron Adams** filled the new SAVPA role on a short-term basis prior to Paul's hiring after a national search.

Paul spent most of his career as an officer of the Navy's Civil Engineer Corps commanding the Naval Construction Battalion Center, and leading naval construction corps in worldwide construction, disaster recovery and humanitarian assistance operations. Most recently, Paul served as executive administrator for facilities at the Beaverton (Oregon) School District. As with OSU's SAVPA position, each of these roles required frequent outreach and coordination with local authorities, mayors, city councils and other community leaders.



- In April 2019, **Heidi Sann** joined the Division of Finance and Administration as the associate vice president for finance and controller. The Controller's office (composed of Business Affairs, Financial Accounting & Analysis; Procurement, Contracts & Materials Management, and the Business Centers) maintains the university's sound financial and internal control structure in alignment with OSU's strategic plan, develops policies that meet fiduciary and regulatory responsibilities, and meets the needs of the university's departments and community members. Prior to Heidi's tenure, **Jan Lewis** acted as AVPF-Controller; she later returned to her role as the university's budget liaison, acting as OSU's link to the Higher Education Coordinating Commission, the Oregon Legislature, and colleagues at Oregon's public universities.

Heidi's career spans over 25 years in accounting, finance, auditing, controllership and business leadership in private industry and higher education. She has experience as an accountant at a CPA firm, a chief financial officer for a manufacturing company and in business management at a public university. Most recently, Heidi was the controller at a private international company where she was responsible for all aspects of financial policies, procedures, controls and reporting.



- Director of Information Technology, **Ben Wessel**, joined the team in February 2019. A new position for the DFA, the Director of IT reports to the SAVPA and is responsible for evaluating and coordinating the division's technology infrastructure and systems needs. The IT Director collaborates with the University Information and Technology on broad projects and resource allocation. Prior to joining the division, Ben was responsible for overseeing IT in the Office of Enrollment Management.

Ben brings 14 years of experience in higher education technology with an emphasis in streamlining business processes, project management, data management, and innovation. Ben has been with Oregon State since July 2010 and led technological advances for the Division of Enrollment Management, including implementation of Salesforce CRM and Marketing Cloud. Ben is an active member of numerous cross-campus IT committees, working to guide technological improvements for the OSU community.



• **Tom Doyle** became Oregon State's Director of Environmental Health & Safety in September 2018. In this role, he is responsible for protecting the safety of the OSU community in laboratories, the workplace, and the university's environment. The Office of Environmental Health & Safety provides training, consultation, various safety and health services, and helps university personnel comply with federal, state and local regulatory requirements.



Tom's background includes over 30 years of experience directing comprehensive EHS programs at top-tiered academic research institutions, including significant experience at prominent U.S. medical centers. Prior to joining OSU, Tom was Director of Environmental, Health, Safety & Security at Weill Cornell Medicine-Qatar, the first American medical college established outside the U.S. He has also held several positions in EHS at Texas Tech University, Baylor College of Medicine in Houston, Texas and Northwestern University in Chicago.

Organizational changes

- **UFIO head retires:** At the end of fiscal year 2019, **Anita Azarenko** retired from her position as associate vice president for University Facilities, Infrastructure and Operations, a major unit that reports to the SAVPA. Following her announcement, Anita was selected as the university's interim vice provost for outreach and engagement. Anita held the AVP position since 2015, after a career of more than 30 years with Oregon State University as a professor of horticulture, an academic department head, and as associate dean of the graduate school. Under her leadership, the UFIO team refined project planning standards and created a multi-stage approval process to keep major capital projects on track. A national search for AVP for UFIO is underway.
- **Enterprise Risk Services reorganizes:** Risk Services and Environmental Health & Safety have separated into two units that both report to the senior AVP for administration. **Christina McKnight** is the Interim Director of Insurance and Risk Management Services overseeing risk and insurance services, and **Tom Doyle** is Director of EHS. At the same time, Emergency Management, led by **Michael Bamberger**, moved to the Department of Public Safety.

