

**Indiana State University**

**Division of  
Finance and Administration**

# **Annual Report 2021-22**



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# **FINANCE AND ADMINISTRATION**

## **ANNUAL REPORT**

### **2021-22**

#### **INTRODUCTION**

The Division of Finance and Administration is comprised of approximately 261 staff employees and 48 student employees (not including bookstore operations) that provide an array of daily services and support to the University community. Many of these employees routinely perform daily tasks such as cleaning, maintaining, and transaction processing that are critical to the appearance of campus and are necessary in providing essential services to students, employees, and visitors. These services add a substantial value to the overall University atmosphere and integrity that is critical.

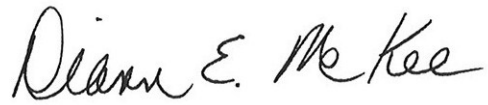
Finance and Administration provides the business functions of accounting, budgeting, investing, procurement, facilities management, payroll, risk management, public safety, audit, and human resource management to the colleges, departments, employees, and students of Indiana State University. In performing these functions, every effort is made to ensure the protection of University assets and compliance with all laws, regulations, and business practices. The unit is comprised of 11 operating departments that include:

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

These areas each operate with values and principles that emphasize teamwork and integrity and focus on quality assurance that make a significant contribution to Indiana State University.

This annual report is designed to inform constituents of the contribution the Division of Finance and Administration has made to the University. To that end, effort has been made to capture and

quantify the more significant services and support that are provided, highlight accomplishments over the past year, as well as demonstrate the management of resources responsibly as we anticipate better days beyond the pandemic.

A handwritten signature in black ink that reads "Diann E. McKee". The signature is written in a cursive, flowing style.

Diann McKee

Senior Vice President for Finance and Administration / University Treasurer

**Senior VP for Finance & Administration/University Treasurer**

**Financial Accounting/Controller**

- Accounts Payable
- Property Accounting
- Procurement Card
- Financial Systems
- Investment Management
- Debt Management
- Purchasing/Central Receiving
  - Contract Administration
  - Central Receiving/Surplus
- Travel

**Campus Facilities Operations and Maintenance**

- Operations/Maintenance
- Utilities Management
- Housing Facilities Operations
- Recycling/Custodial Services
- University Mail Services

**Capital Planning and Construction**

- Construction Planning
- Engineering
- Grounds
- Campus Vehicle Maintenance
- Space Utilization

**Environmental Health/Safety**

- Fire Safety
- Occupational Safety

**Student Financial Services**

- Bursar Operations
- Receivables/Sys. Management
- Contracts and Grants
- E-Commerce System
- Barnes and Noble Bookstore
- Perkins Loan Post Award

**Administrative Services**

- Budget
- Payroll
- Risk Management
- Payroll Systems Administration

**Human Resources**

- Employee Benefits
- HR Recruiting
- Employee Relations
- Compensation/Records
- Staff Training/Development
- Workers Compensation
- Employee Wellness
- ADA Accommodations

**Public Safety**

- University Police
- Parking and Traffic
- University ID System

**Audit Liaison**

**Staff Council Liaison**

Effective July 1, 2021

# University Statement of Mission, Vision, and Core Values

## MISSION

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

## VISION

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

## CORE VALUES

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

# **OFFICE OF THE SENIOR VICE PRESIDENT FOR FINANCE AND ADMINISTRATION / UNIVERSITY TREASUER**

**2021-22**

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

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

Additional responsibilities of the Office of the Senior Vice President for Finance and Administration/University Treasurer include, but are not limited to the following:

- Serve as Chief Financial Officer of the institution.
- Engage primarily in formulating business policies, developing operating procedures, and coordinating business operations.
- Support President of the University and Government Relations in advancing the needs of the University at the state level.
- Develop the biennial state capital and operating request in conjunction with University President.
- Account for and safeguard University assets.
- Lead in the preparation and monitoring of the University budget.
- Improve and maintain University facilities.
- Develop Campus Master Plan.
- Lead in the management of new construction and facility expansion.
- Oversee and manage outstanding University debt and issuance of new debt.
- Manage investment of University funds.
- Prepare financial reports as needed by the administration and Board of Trustees.
- Serve in the following capacities:
  - Member of the Finance Committee of the Indiana State University Foundation
  - Member of the Audit Committee of the Indiana State University Foundation

Division retirements throughout the year included:

Assistant Director; Purchasing & Central Receiving; 19 years of service

Risk Manager; Budget, Payroll & Risk Management; 22 years of service  
Police Lieutenant; Public Safety; 40 years of service  
Records Coordinator; Public Safety; 10 years of service  
Administrative Assistant II; Environmental Health & Safety; 43 years of service  
Construction Project Inspector; Facilities Management; 22 years of service  
Steam Plant Manager; Facilities Management; 42 years of service  
Steam Plant Mechanic; Facilities Management; 40 years of service  
Electrician; Facilities Management; 32 years of service  
Custodians (4); Facilities Management; 70 years of service combined  
Custodial Supervisor; Housing Facilities; 27 years of service  
Custodians (2); Housing Facilities; 43 years of service combined



# BUDGET AND PAYROLL

## 2021-22 ACCOMPLISHMENTS

- Successfully built, tested and implemented 10 new health codes in January 2022 providing greater efficiency in building and verifying codes and allowing employees to see the health plan deductions more clearly detailed on their pay stub.
- Developed a faculty budget spreadsheet designed to track faculty lines in greater detail, assist in evaluating vacant lines, and keep faculty positions up to date in Banner.
- Processed 55,036 pay events in 2021-22 with a total gross payroll of \$98,490,950.
- Issued 4,347 W-2s in 2021 with 54% being issued through the ISU portal.
- Withheld \$20,242,584 in taxes and timely submitted over 50 payments with corresponding federal and state reports.
- Completed 70 wage verifications.
- Processed 507 involuntary wage deductions (child support, wage garnishments, and delinquent tax withholding) resulting in 131 payments to outside agencies.
- Applied 1,219 salary budget increases to full-time benefit eligible faculty and staff positions.
- Processed over 550 capital project invoices & requisitions via check requests, purchase orders and procurement card transactions; approximately \$26M in capital project expense flowed through Plant Fund programs.
- Reviewed and/or updated 2,147 salary budgets due to various position changes such as promotions, new hires, reallocations, transfers and separations via EPAFs.
- Audited samples from over 850 employee salary records in the University's Salary Book for reporting accuracy.
- Compiled exempt & non-exempt employee FTE (931) and salary data (\$47.2M) for comparison purposes from the Budget Office to the Human Resources Staffing Report to ensure reporting accuracy.
- Assisted 22 auxiliary/designated units with approximately 83 departmental budgets totaling \$83.7 million.
- Updated Budget Development procedures to further assist budget managers in the budget upload process.

# CONTRACTS AND GRANTS

## 2021-22 ACCOMPLISHMENTS

- In FY 22 we requested the setup of 42 indexes for external projects that have been awarded to Indiana State University.
- Indiana State University recorded \$216,573 in Indirect Cost Recovery for FY 22 F&A recovery for external grant awards.
- Indiana State University recorded \$19,475,217 of externally funded grant costs during FY 22. Of this amount \$13,393,670 was for CARES/CRRSAA/ARP funding received from the US Department of Education due to the COVID-19 pandemic.
  - Indiana State University was the recipient of several larger externally funded grants that began during FY 22 including funding from the SBA & HRSA.
- FY 21 2CFR200 Uniform Guidance Single Audit with an unmodified opinion & no findings
- Continued to review Federal Regulations & requirements for cash management related to CARES/CRRSAA & ARP funding received from the US Department of Education during FY 22. Coordinated drawdown of funds as expenses were incurred. Coordinated quarterly report submissions for Institutional & SIP funding received. Coordinated compilation of Annual Performance Report for Student, Institutional, & SIP funding received.
- The FY 20 IDC Proposal to HHS prepared & submitted in FY 21 is still awaiting final negotiations for IDC rate as of 6/30/2022

# ENVIRONMENTAL HEALTH AND SAFETY

## 2021-22 ACCOMPLISHMENTS

- Monthly and annual inspection of 821 portable fire extinguishers
- Monthly inspection of 358 fire protection control/section sprinkler valves
- Weekly and monthly inspection of 35 post indicator fire protection valves
- Quarterly inspection/alarm and annual operational trip test of 17 water-based pre-action sprinkler and alarm systems in campus buildings and 35 wet sprinkler systems
- Monthly and annual operational/churn testing of 7 stationary fire pumps
- Completed repairs to 40 cases of leaks, failed switches, mechanical parts/malfunctions in water-based sprinkler systems
- Semi-annual inspection and operational testing of 4 fixed CO2 extinguishing systems, 2 fixed halon, 1 energen clean agent extinguishing system, and 1 Sapphire System in Rankin Hall
- Conducted annual fire extinguisher training – 3 groups
- Conducted semi-annual fire safety inspections in all campus buildings
- Resurveyed numerous campus buildings to assist in establishing occupant load capacity for COVID-19 distancing requirements
- Inspected, tested, and commissioned Dreiser Hall sprinkler system and fire pumps
- Conducted semi-annual property conservation audits with Field Engineer from FM Affiliated Insurance Company to assess the University's continuing compliance with requirements and recommendations
- Document collecting and processing for all property conservation activities (fire protection, surface water management, building safety) as required for regulatory compliance from various Authority Having Jurisdiction (AHJ) and recommendations by FM Affiliated Insurance Company
- Annual activation of 168 eyewash and safety shower units
- Over 35 research and teaching laboratories were formally inspected
- Annual inspection and flow test of 120 chemical fume hoods
- 400 Safety Data Sheets added or updated on SDS Online data base for Chemistry Stockroom
- Distributed approximately 335 pieces of personal protective equipment (gloves, safety glasses, hearing protection, filtering face pieces, etc.) to employees, primarily to Facilities Management
- Conducted or helped organize approximately 541 employees training on a variety of occupational safety topics
- Completed a safety review of the College of Technology (COT) laboratory spaces including:
  - Safety evaluation of each lab
  - Uploaded chemical inventory to MSDSONline for Safety Data Sheet access
  - Assisted COT faculty and staff with Lab Hazard Assessments for accreditation requirements

- Updated hard copy of SDS binders and uploaded chemical inventories to MSDSONline for Safety Data Sheet access for Student Recreation Center and Hulman Memorial Student Union
- Completed OSHA 300 Log of Work-Related Injuries and Illnesses for both reportable and non-reportable incidents
- Completed OSHA 300A Summary of Work-Related Injuries and Illnesses. Posted Summary on Human Resources' bulletin board and submitted electronic data as required by OSHA and Bureau of Labor Statistics
- Universal waste recycled included:
  - 9,316 individual fluorescent and HID lamps
  - 117 pounds of various batteries
- Prepared and submitted annual Hazardous Waste Report to Indiana Department Environmental Management
- Indoor Air Quality investigations were conducted in several campus buildings with resolution from HVAC modification, mold abatement, and cleaning of mechanical systems and interior spaces
- Completed Nuclear Regulatory Commission remote inspection of material license with no violations identified
- Completed 3 year renewal of Class A/B Operator Underground Storage Tank training
- Waste disposal for the year included:
  - 3,023 pounds of hazardous waste
  - 7,360 pounds of special waste
  - 185 pounds of biohazardous waste

# FACILITIES MANAGEMENT

## 2021-22 ACCOMPLISHMENTS

### Facilities Management

- Completed 18 projects worth over \$55 million.
- Major projects included Hulman Center (\$50 mil), Burford roof, and tunnel repairs.
- Received Tree Campus USA designation for 15<sup>th</sup> consecutive year.
- Campus facility master plan was updated.
- Completed over 8,000 Service Requests within campus facilities.
- Total mail handled by the Mail Services Department totaled 1,052,408 pieces.
- The Central Heating Plant produced 262,889,970 pound of steam used for building heat and domestic hot water for the campus community.
- Purchased 370,000 Dekatherm of natural gas for Fiscal Year 2025 and 370,000 Dekatherm of natural gas for Fiscal Year 2026

### Housing Facilities Operations

- 10,068 Work Orders Received by all department of HFO with a 98% completion
- Reeve Hall High Humidity Project making serious progress – fire dampers repaired, sheave's sizes changed, ERU's rewired, etc.
- Jones Hot Water – Repaired tank, replaced backflow preventer, added valves, and replaced control valves and operators. Restored hot water.
- Assisted in Residential Life's covid quarantine and isolations providing clean disinfected rooms and areas throughout the pandemic.
- Hosted Special Olympics with over 2000 participants and ISO staff in residential halls.

# FINANCIAL ACCOUNTING

## 2021-22 ACCOMPLISHMENTS

- Timely and accurate processing of financial transactions including invoices, student refunds, journal vouchers, encumbrances, and disbursements.
- Financial Reporting and Analysis including but not limited to:
  - Completion of FY 2020-2021 Financial Report
  - Analyzed all agency funds for implementation of GASB Statement 87, Leases, to separate capital and operational leases and reassess expenses to determine which should be considered an operational lease under the new guidelines.
- Tax management including but not limited to creation and distribution of all 1099, 1098-T and 1042-S Tax forms.
- Collaborate with OIT on software upgrades including implementing Banner 9 Finance Dashboard.
- Support of and training for Blue Reports for Finance.
- Researching solutions for electronic forms and digital approval / signatures.
- Management of Travel activities including COVID-19 protocols.
- Oversight of Student organization services.
- Debt Service Management.
- Oversight of Purchasing functions including providing technical support for reporting requirements.
- Evaluated Chrome River for use in non-travel related expense reimbursements and enhance the current travel implementation.
- Fully implemented Egencia for ISU travelers so that hotels utilized for business travel can be direct billed to the University.
- Implemented a process to close all related accounts and revoke Banner Finance access upon separation from the University. This includes access to bank accounts, ISU credit cards and credit card processing merchants, travel websites (Egencia, Enterprise & Altour) as well as maintenance of Banner Financial Managers. A similar process was put in place to modify access upon employee transfer within the University.
- Hired a new Director of Purchasing, Buyer and Support Staff for purchasing to bring the area back up to full staff.
- Compensated for staff shortages in Travel and Accounts Payable. Hired new staff for both positions and worked with new staff to train on policies and procedures.
- Worked with Purchasing and OIT to eliminate custom Purchasing sub-systems (Company Processing System & Inventory Surplus System).
- Implemented a new card program for Residential Life due to Walmart discontinuing the use of our purchase orders.
- Changed software used for reporting of international taxes for students.

# HUMAN RESOURCES

## 2021-22 ACCOMPLISHMENTS

- Partnered with Academic Affairs to implement a new process that eliminates the completion of the Instructor and Lecturer Reappointment Authorization form. The new process involves completing a hiring proposal in the Applicant Tracking System, which makes the process efficient and paperless.
- Collaborated with other departments/offices to provide PeopleAdmin, Chrome River and Billing training. A total of 64 employees attended the three sessions that were offered.
- Implemented a new process for submitting criminal background checks that eliminated data entry into the vendor website by Human Resources personnel. Currently, working on integrating PeopleAdmin with Reference Services, the background check vendor. This integration will reduce the time spent to submit criminal background check requests.
- Partnered with the President's Office to plan and implement an in-person Employee Recognition and University Medallion award ceremony.
- In collaboration with Student Affairs and other stakeholders to implement the Sycamore Community Health Initiative. Part of the initiative was to implement a COVID-19 testing process for faculty, staff, and students, continue to update COVID-19 materials as needed and monitored COVID-19 cases and COVID-19 vaccination status.
- Implemented/Tested an optional Flex Time and Hybrid Work Schedule for the summer months providing a positive benefit for employees, supporting employee engagement, positive morale and retention.
- Reinstated face-to-face new employee orientation while adhering to COVID-19 safety guidelines. A total of 22 bi-weekly staff orientation sessions were held.
- Launched in-class Supervisor Certification program with 9 participants completing the program.
- Implemented the Supervisor Workshop Training Series. These are cafeteria-style workshops that allow employees to register and attend topics that benefit them professionally.
- Collaborated with Academic Affairs, Payroll, and the Controller's Office in creating a Training Program for Administrative Assistants.
- Assisted departments and divisions with reorganizations as we have undergone staffing changes.

# **PUBLIC SAFETY**

## **2021-22 ACCOMPLISHMENTS**

- Five (5) new officers hired.
- Promoted from within the department to fill the Patrol, Clergy, and Accreditation Lt. position after a lengthy interview process.
- Completed and updated the Emergency Response Plan (9/21)
- Completed and updated the Annual Security Report (9/21)
- Updated all 60 Building Coordinator Plans
- Received grant money from the Drug Free Vigo County Council for a mobile traffic sign and counter to assist with traffic during campus events.
- Each officer completed 24 hours of continued training mandated by ILEA
- Began a remodeling project to relocate Traffic and Parking Services to a new location and to expand our 911 dispatch center.
- The entire department completed the University Educators Diversity, Equity, and Inclusivity Module of training.
- Refurbished and cleaned all 911 Blue Lights on campus (33)
- Participated in over 150 programs/events on campus and off campus including Special Olympics, Law Enforcement Torch Run, Polar Plunge, and Tip a Cop.
- Implemented a Citation Collections initiative with T2 on 4/15/22 for past due parking citations and have collected over \$8500 to date.
- Purchased new hand held radios for the entire police department and CSOs including mounted radios in the police vehicles.
- Purchased new updated rifles for the police vehicles
- Purchased and implemented Power DMS software for Accreditation tracking and to house our General Orders.



# RISK MANAGEMENT

## 2021-22 ACCOMPLISHMENTS

- Implemented the United Educators training system with ISU custom portal and single sign-on in the spring of 2022. Learning paths with specific courses have been established for new employees, regular employees and student employees and a weekly interface was written to keep employee information up to date within the system.
- Completed a training plan for the United Educators 6% premium credit for the 2023 policy renewal.
- Created a Certificate of Insurance Request Qualtrics form on the Risk Management website.
- Educated campus on Safety and Risk Management topics via ‘Did You Knows’ in the ISU Today. Topics included driving vehicles, driving golf carts, certificate of insurance, grilling on campus and vehicle guidelines and procedures.
- Completed applications and secured insurance renewals for multiple lines of coverage.
- Developed guidelines and procedures for events involving inflatables, animals, and color powder.
- Reviewed 23 unique events with the Special Events Committee and student groups.
- Developed internal guidelines for COIs for student organizations.
- Reviewed approximately 25 contracts for approval of insurance provisions.
- Processed 18 notices of auto/liability claims/potential claims and follow-up investigations.
- Processed audits for workers compensation, workers compensation/flight academy and New York State Policy.
- Provided verification letters for professional student placements.
- Participated in a working group to revise the procedures regarding minors on campus.

# STUDENT FINANCIAL SERVICES

## 2021-22 ACCOMPLISHMENTS

- Collaborated with campus constituents and payment platform vendor (TouchNet) to alter the single sign-on identity provider from SAML to Azure for a more streamlined student log-in experience. Implemented TouchNet ACH account validation to comply with NACHA regulatory guidelines. Redesigned the header and footer images and updated information related to TouchNet account suite email communications to reflect a more modern look. Collaborated successfully with other universities, payment service vendor (TouchNet), and the Office of Information Technology to develop payment sites and a programming trigger to allow Enrollment Deposit payments to post directly to the students' accounts receivable record in real time.
- Updated two Banner processes related to student accounts (Variable Payment Plan Fee program and Hold program) to include the approved Health & Wellness fee in payment plan balance calculations, to utilize the effective date instead of entry date in the calculation of the payment plan fee assessment, and to systematically extend account holds under the University registration threshold.
- Restructured accounts receivable and Perkins loan collection agency placement files to include the required Consumer Financial Protection Bureau (CFPB) Regulation F Debt Collection Practices information.
- Partnered with University departments to test and implement an updated Student Portal and Banner 9 Self-Service for a more modern design and platform.
- Transitioned from the Tuition Management System (TMS) payment plan platform to the Nelnet Campus Commerce payment plan platform due to vendor acquisition.
- Gained knowledge of and began utilizing the Banner baseline program (GJRPSIM) related to the creation of population selections, instead of using a modified program.
- Implemented the Banner Communication Management module to streamline messages sent to students related to their accounts and to record details of the communications sent for use by staff.
- Analyzed the Parking Citation Services contract for implementation to collect past due parking fines related to non-campus individuals, including the negotiation of the collection fee rate.
- Analyzed Payment Card Industry (PCI) documentation for installation of the new credit card- accepting parking lot pay stations, resulting in approval to proceed.
- Analyzed 1,426 Perkins Loans for assignment to the Department of Education, with 1,187 being prepared, submitted, and accepted. The remaining 239 accounts are still serviced by ISU due to payments being made through legal proceedings.
- Intercepted in excess of \$463,000 through the Indiana Department of Revenue Tax Offset Program.
- Increased the number of accounts placed with the Indiana Department of Revenue Tax Offset Program, from 5,039 at the start of FY22 to 6,149 at the end of FY22. This increase is inclusive of all accounts being currently placed with external collection agencies.

- Achieved Payment Card Industry assessment rating of fully “Compliant”. Also participated in both the financial and federal audits, neither of which had findings.
- Evaluated 80 vendors to ensure Payment Card Industry compliance.
- Negotiated pricing and contract terms with the Payment Card Industry assessment vendor, resulting in a three-year agreement for 2022 through 2024.
- Developed a method to convert Commuter Meal Plan information received from Sodexo Dining into a Banner lockbox format so charges can be applied to student accounts systematically instead of manually.
- Upgraded the Campus Receivables Collector (CRC) Perkins loan system to the current release and installed the updated Federal Perkins Loan Program/NDSL Assignment Form.
- Conducted review of the Higher Education Emergency Relief Fund (HEERF III) regulations, tested all new detail codes created for disbursement of funds, and ensured all financial aid disbursement of funds were applied to student accounts or refunded to students as expected.
- Reduced Perkins Loan COHORT default rate from 13.79% in FY21 to 8.05% in FY22.
- Launched Red Flags training for Bursar Operations staff to ensure account information is monitored in accordance with University procedures and the Federal Trade Commission Rules related to identity theft.
- Developed a monthly process of auditing the various descriptive “flags” to ensure student accounts reflect accurate information/status identifiers.
- Enrolled Fiscal Operations Director, Collections/Perkins Loan Supervisor, and Accounting Unit Supervisor in Human Resources Supervisor Training course and all were successfully certified.
- Maintained records and attended training sessions related to the U.S. Army’s invoicing system overhaul and successfully submitted all invoices for students once the system was in production.
- Investigated deferred tuition utilization at other higher education institutions, which led to a determination that it was not a prevalent practice and a recommendation to not institute the practice at ISU.
- Updated the Bursar Operations website to a new template and moved items from the Sycamore Express website that is no longer maintained, back to the Bursar Operations website.
- Developed new payment processes to pay medical facilities for the support of clinical medical students.
- Implemented the most in-depth security measures seen over the last 40 years within the Office of the Controller, with an emphasis on pedestrian access to the main office, resulting in a significant reduction in inner office pedestrian traffic.
- Ensured that continuous vigilant monitoring of COVID safety measures remained in place, to encourage adherence by all to established COVID protocols.
- Collaborated closely with University leaders in association with the Office of Extended Partnerships/Preferred Partner agreements and the former Extended Learning/Nontraditional Credit Bearing Programs, to help ensure accurate program continuance, from a fiscal perspective during a period of major reorganization.