Finance
Business Operations Forum

March 15, 2023

California State University
MONTEREY BAY

Agenda

1. Routine Maintenance Requests & Non-Routine Service Requests *(45 minutes)*
2. CSU single use plastics policy and best practices; and the sustainable events blueprint *(20 minutes)*
2. *Break - You Otter Stretch!!*
1. File Storage Changes *(15 minutes)*
2. Did You Know? *(15 minutes)*
   - New Delegation of Authority (DOA) Rollout Plans
1. Next BOF & Finance Office Hours
1. Q&A

Routine Maintenance Requests & Non-Routine Service Requests

Facilities Management Department

California State University
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Introductions

- Julie Wyrick – Director of Campus Planning & Development
- Hugh Macken – Director of Facilities Maintenance & Operations

About Us

- Facilities Management is made up of 50+ people
- We are responsible for planning, design, construction, maintenance and repair of university facilities and grounds, and our department consists of 11 critical and interdependent support teams
- Our main office is located in Building 37
- We strive to enhance the customer experience; and ensure that the campus environment is clean, safe, and well-maintained

Some of our areas of services:

- Design & Construction
- Campus planning
- Space planning
- Building Services Engineering
- Carpentry
- Electrical
- General Maintenance
- Painting
- Plumbing
- Locksmithing
- Janitorial
- Landscaping
- And more

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Routine Maintenance vs Non-Routine Service… What's the difference?

Routine Maintenance

Routine (or day to day) services that FMD staff provide that do not add, change, or alter the current physical environment

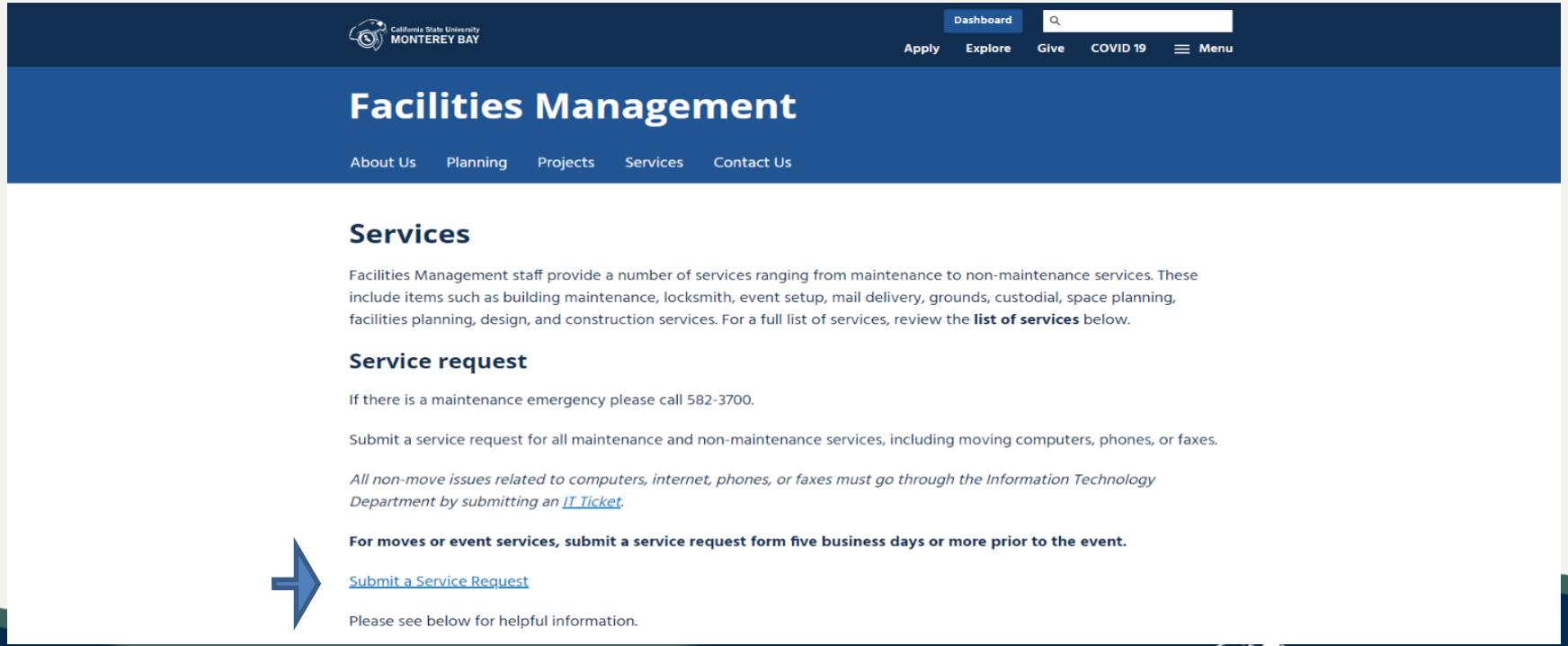
- Roof Leaks
- Utility Repairs
- Tripped Circuit Breakers
- Plumbing Leaks
- Lock/Key Repair
- Heating/AC
- Painting Touchups
- Custodial

Non-Routine

A service that adds to, changes, or alters the current physical environment

- Remodeling / Alterations / Renovation
- Moving Services
- Interior/Exterior Furniture Installation
- New Construction/ New Facilities

Website



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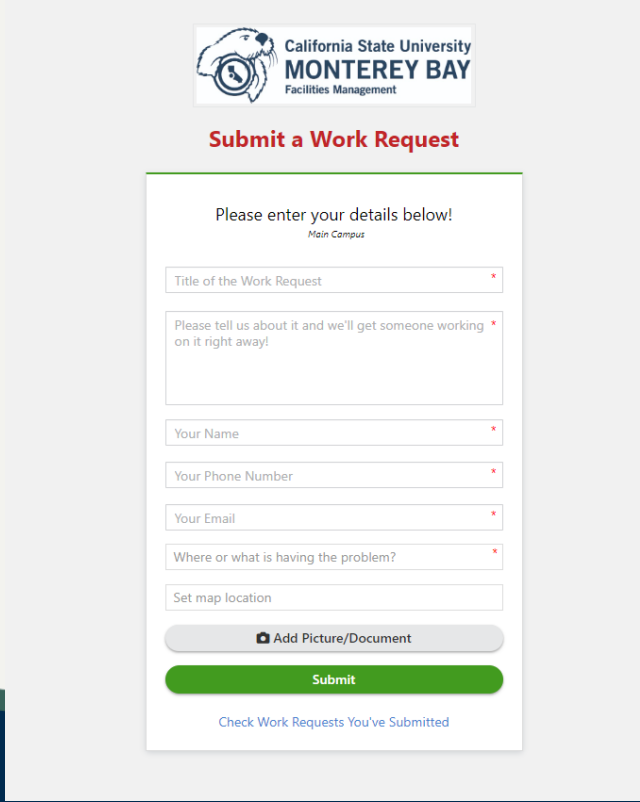
Limble



- Limble is the portal we use for Service Requests
- Attach your Intake Form here
- Try to be as detailed as possible

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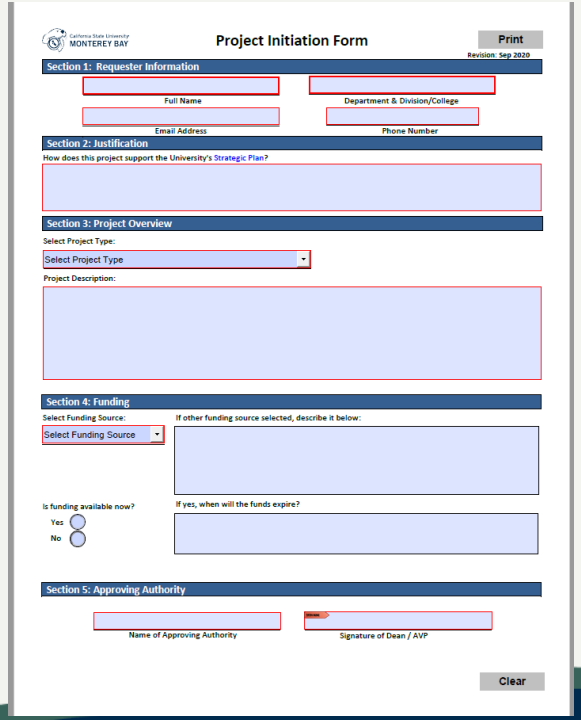
Intake Form for Non-Routine Service Requests

- Formerly known as the Project Intake Form or PIF
- The Intake Form is what we use to process a Non-Routine service request before it becomes finalized
- A service request will NOT be considered without an Intake Form attached
- The Intake Form can be found on our Facilities website page
- Requires Dean/AVP Signature
- The form is subject to change



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Project Initiation Form

Print

Revision: Sep 2020

Section 1: Requester Information

Full Name

Department & Division/College

Email Address

Phone Number

Section 2: Justification

How does this project support the University's Strategic Plan?

Section 3: Project Overview

Select Project Type:

Select Project Type

Project Description:

Section 4: Funding

Select Funding Source:

Select Funding Source

If other funding source selected, describe it below:

Is funding available now?

Yes

No

If yes, when will the funds expire?

Section 5: Approving Authority

Name of Approving Authority

Signature of Dean / AVP

Clear

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Timelines

We understand that as a requestor you have a vision of when a request should be completed and strive to acknowledge and process all requests in a timely manner.

Timelines can vary due to several factors:

- Completeness of information in initial request
- Funding availability and spending constraints
- Availability of staff to assign work
- Campus priorities

Funding

A funding source must be identified before a Non-Routine service request can be considered.

The chartstring must be included on the Intake Form. If a funding source or chartstring is not included a request may be put on hold pending further review.

Things To Remember

- Submission does not guarantee a Non-Routine service request will be approved
- Intake Form & Funding are required at submission
- The price or scope of a submitted request may vary
- FMD may determine that a request requires further investigation, ADA accessibility, permits, or funding which could result in a longer response or completion time
- A Non-Routine service request may change into a Routine Maintenance request and vice versa. Requests will be evaluated to determine if they are Routine or Non-Routine
- Cannot hire an outside contractor

Contact Us

Phone: 831-582-3700
Email: FM@csumb.edu
Location: Building 37

Julie Wyrick – jwyrick@csumb.edu
Hugh Macken – hmacken@csumb.edu

Questions

CSU single use plastics policy and best practices; and the sustainable events blueprint

Lacey Raak, Director - Sustainability

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TO SUPPORT THE NATURAL ENVIRONMENT
AND ALL PEOPLE LIVING WITHIN IT

INCLUSIVE SUSTAINABILITY PLAN

2020-2030

RAISING AWARENESS OF OUR INCLUSIVE SUSTAINABILITY PLAN

Campus-wide Effort

- Engage the campus community in actions to support the goals and strategies identified in the plan

Collective Action

- Meet our sustainability goals
- Improve our national sustainability ratings
- Ensure decisions and actions reflect our campus values

“INCLUSIVE SUSTAINABILITY”

Co-creating a Vibrant Future

- Independent and collective action
- Needed and shared by ALL
- Deeply rooted intersection between environment, justice, equity

COLLECTIVE ACTION IS THE ANSWER

We have the power to make an impact for our campus and our community.

- Improve Mental Health
- Build Community
- Save Money
- Steward of Natural Resources
- Support Recruitment and Retention

THE INCLUSIVE SUSTAINABILITY PLAN IS CONNECTED TO EVERY AREA OF CAMPUS LIFE, CULTURE AND OPERATIONS.

- Waste
- Energy
- Habitat
- Water
- Co-Curricular Learning
- Procurement
- Transportation
- Food
- Resiliency
- Communication and Engagement
- Built Environment
- Curriculum

THREE CORE GOALS

1

Reduce Greenhouse Gas Emissions and Achieve Carbon Neutrality by 2030

2

Plant 2,030 trees

3

Divert 90% of waste from landfill

CORE GOAL 1

ENERGY

What the campus is doing

Lighting retrofits

Electrify operations
(reduce natural gas consumption)

What you can do

Vampire Loads -
Unplug items from the wall when not in use
(cell phone chargers, coffee pots, etc.)

Commute Options -
Explore your cost-saving options to bike, bus, carpool

CORE GOAL 2

TREES

What the campus is doing

Mapping all planting locations and trees planted

Establishing funding sources to continue habitat care

What you can do

- **Join us at a planting event**
- **Spend time in nature - Go for a walk, rest under the trees, slow down.**
- **Plant native flowers and plants in you garden**

CORE GOAL 3

WASTE

What the campus is doing

- Expanding compost collection on main campus
- 2 days for a pop-up re-use store

What you can do

- **Bring your own mug/utensils/water bottle!**
- **Know where it goes... take the time to sort properly**
- **Make your event zero waste**

The other side of the coin

Procurement

PROCUREMENT

Sustainable procurement means choosing products or services that have a lesser or reduced effect on human health and the environment when compared with competing products or services that serve the same purpose. Procurement also includes the integration of sustainability into contracts and vendor agreements. The University reports on all recycled content products purchased through CalRecycle's "Buy Recycled" Program and supports CSU policy requirements such as those related to single use plastic reduction.

31%

Percentage of expenditures on office paper that is 90-100% post-consumer recycled and/or agricultural residue content and/or FSC Recycled label

Percentage of Expenditures on Sustainable* Cleaning & Janitorial Products

PROGRAMS/IDEAS TO SUPPORT YOUR EFFORTS

[Sustainable Events Blueprint]

Appoint a Sustainability Champion from your department and have Inclusive Sustainability be a standing agenda item on regular meetings

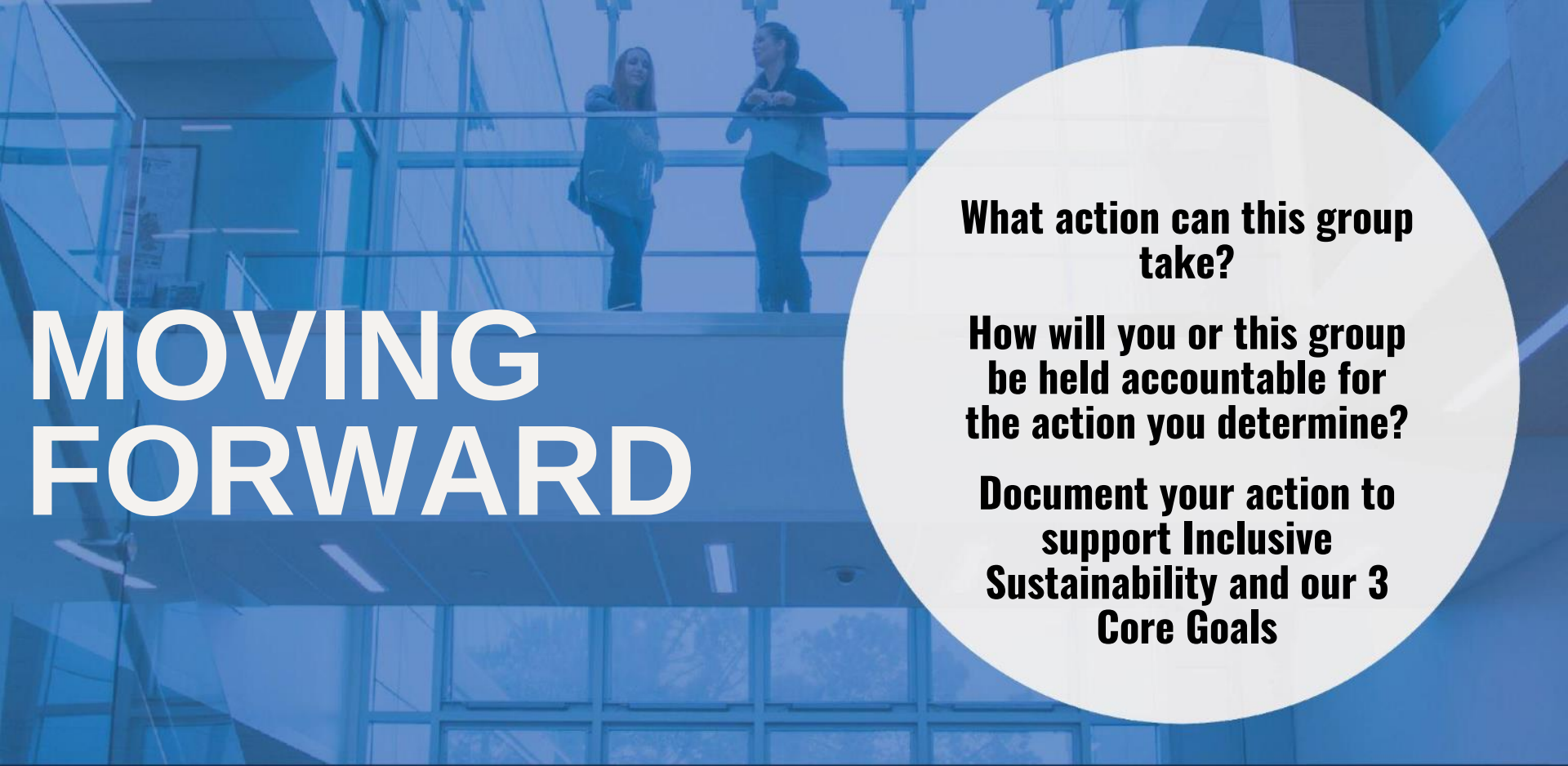
Understand your
“sphere of influence” -
use your unique role on campus and your power/voice to support Inclusive Sustainability

[Green Office Certification]

Your Role is Critical

What is something you would like to ask...a question, an area you need help.

What can you offer to support our campus sustainability efforts?



MOVING FORWARD

What action can this group take?

How will you or this group be held accountable for the action you determine?

Document your action to support Inclusive Sustainability and our 3 Core Goals

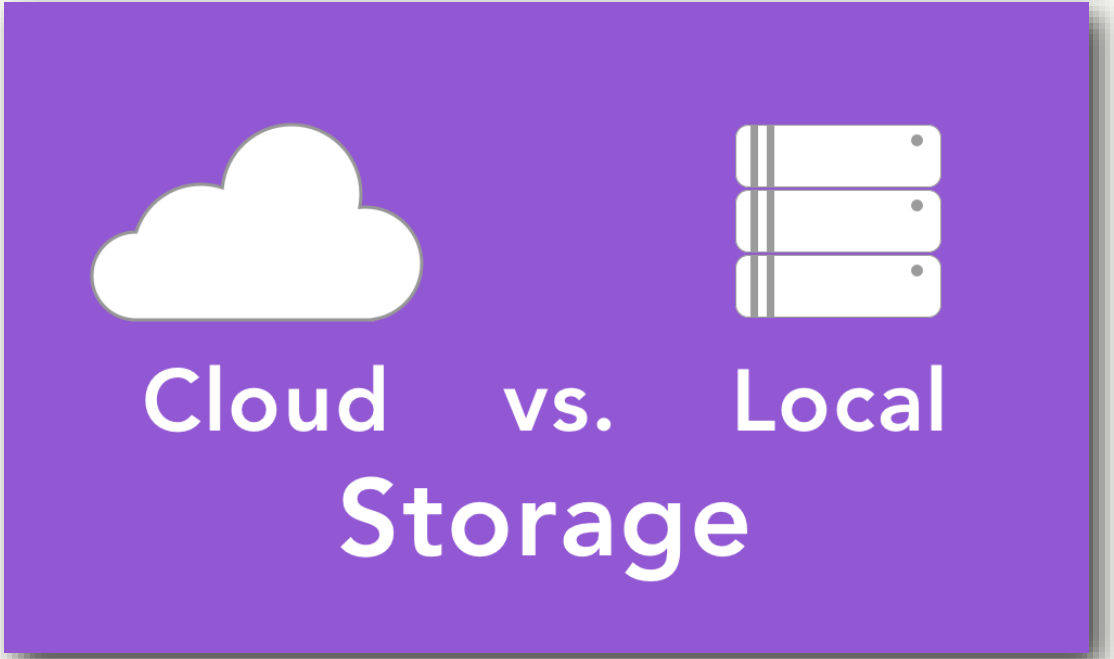
Campus File Storage Update

Greg Pool, Director of Digital Transformation
Division of Information Technology

Overview

[File storage options]

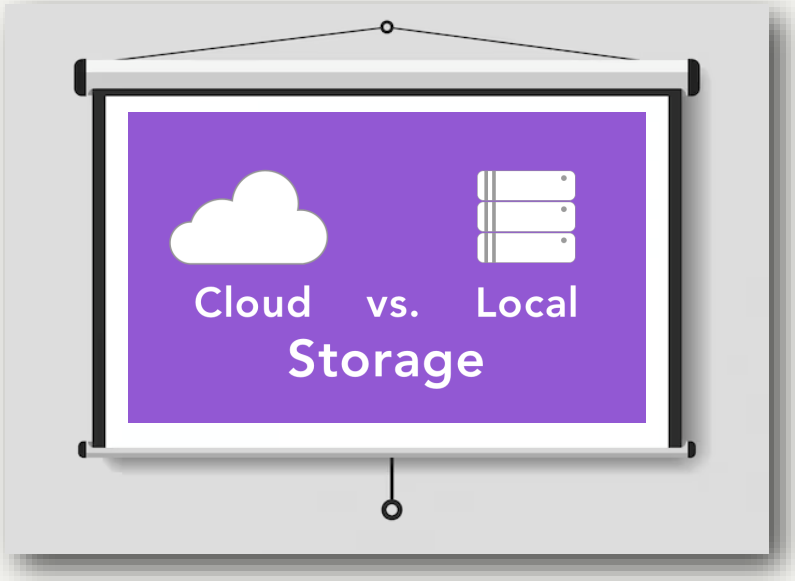
- Google Workspace (My Drive, Email, Photos)
- CSUMBinfo and MyDocs (M and J drive)
- Preview
- Deadlines
- Issues
- Timelines
- Resources



Preview

Presentations

- A&F Business Operations Forum (2/15)
- Academic Senate Technology (3/2)
- IT Insider email (3/10)
- A&F Business Operations Forum (3/15)



IT Operations - still developing standards & procedures

IT Communications - ready to go

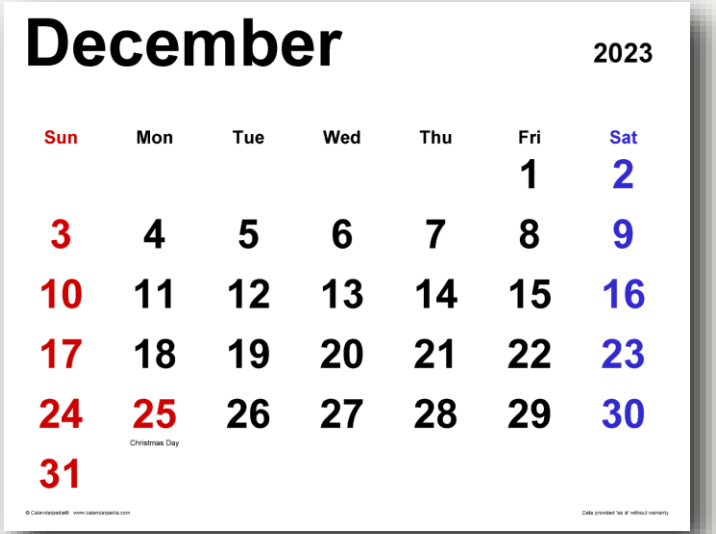
Deadlines

Google Workspace (My Drive, Email, Photos)

- Fall 2023 (December)

CSUMBinfo and MyDocs (M and J drive)

- TBD (2024)



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Issues

Google Workspace (My Drive, Email, Photos)

- Google is applying quotas
  - Individual - My Drive (example: Indiana University)
  - Institutional - Shared Drives (example: Case Wester
- Audit - sensitive data, retention

CSUMBinfo and MyDocs (M and J drive)

- Legacy
- Underutilized
- Move to Google Workspace

Timelines

Google Workspace (My Drive, Email, Photos)

- Spring 2022
  - Faculty
  - Students
- Summer 2023
  - Staff

CSUMBinfo and MyDocs (M and J drive)

- 2023 - audit
- 2024 - reduce/move

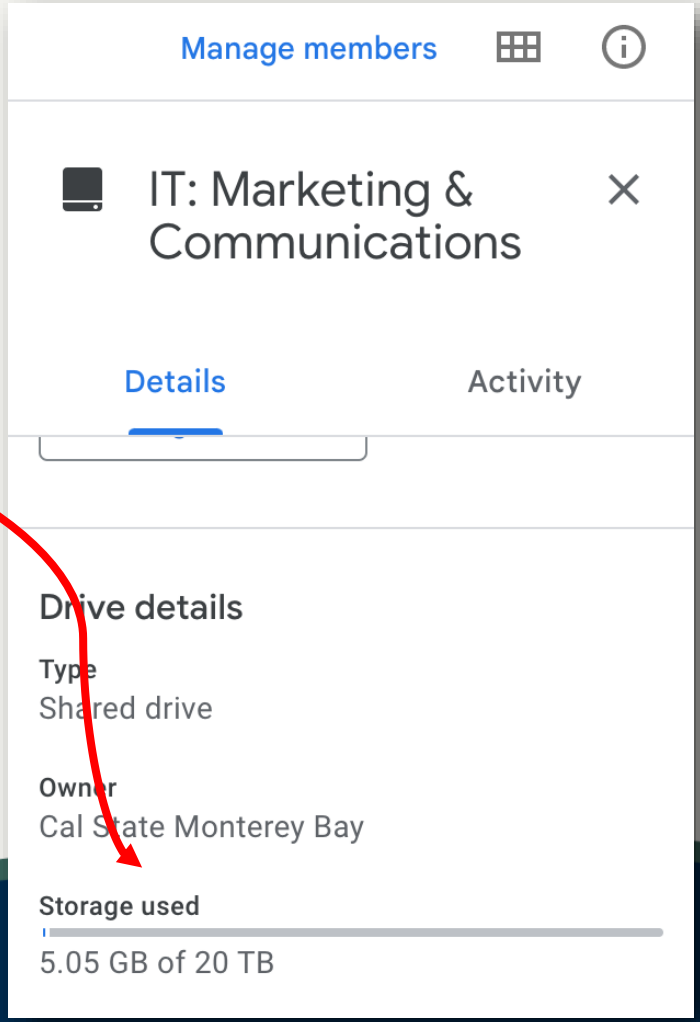
Resources

Google Workspace (My Drive, Email, Photos)

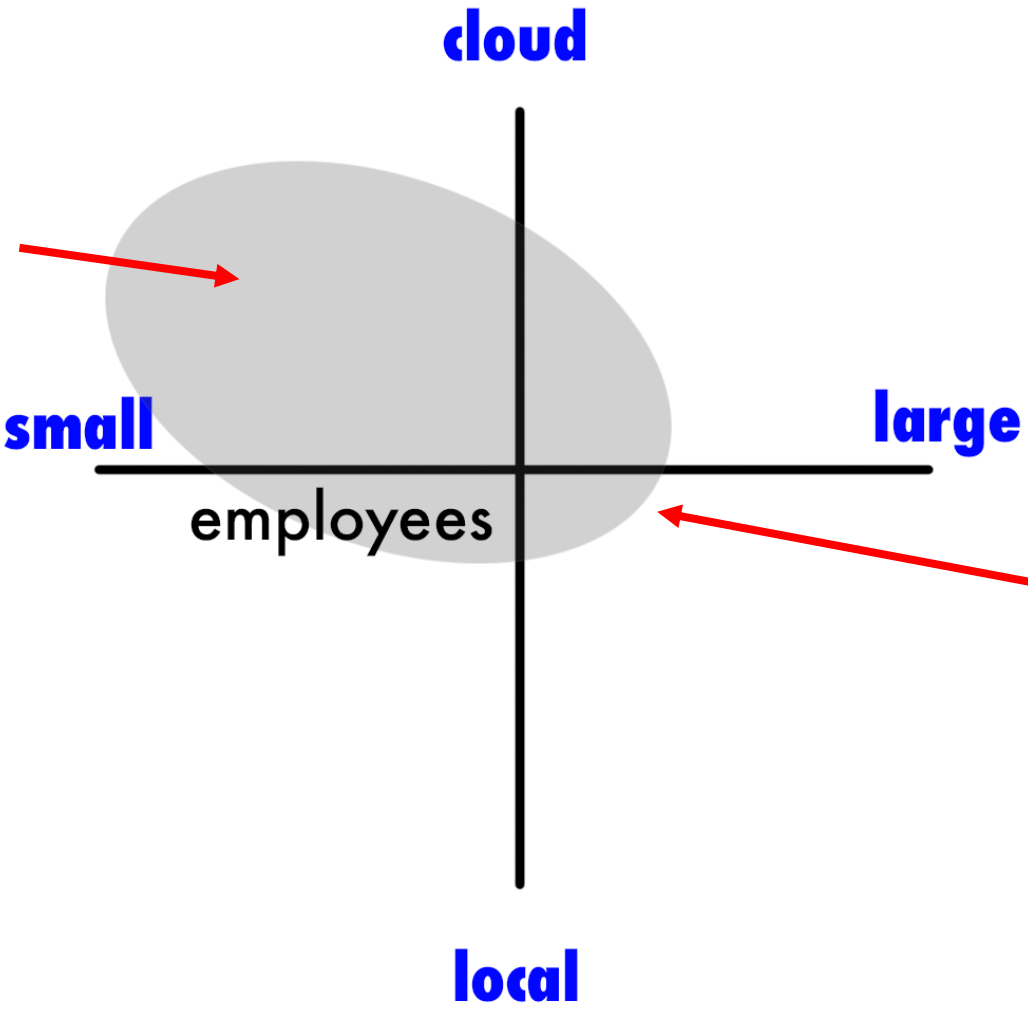
- Individual quota - view your current storage
- Shared Drive - see Details

CSUMBinfo and MyDocs (M and J drive)

- How to move to Google Workspace
- Consultative input on solutions
  - multimedia
  - GIS, super computing
  - genomics

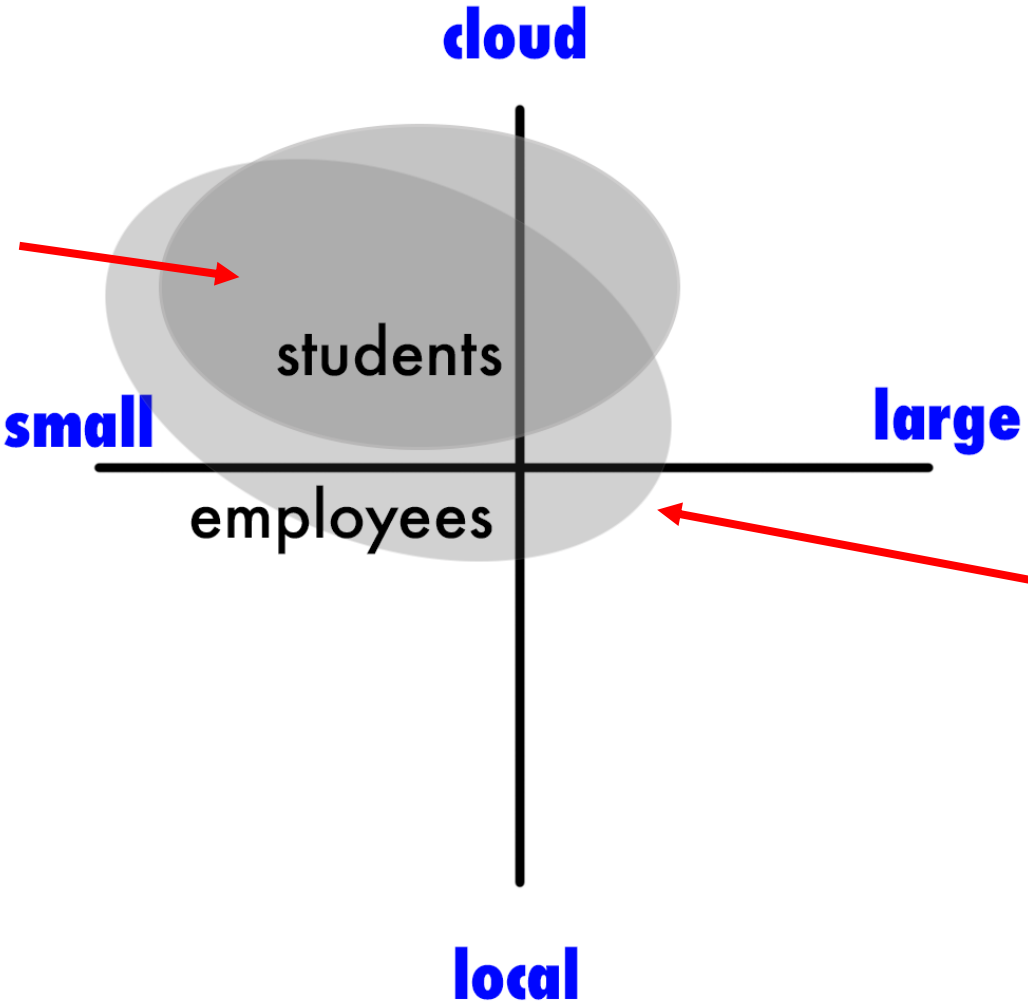


Google
Workspace
My Drive



Future build
on-premises to
specification.

Google
Workspace
My Drive



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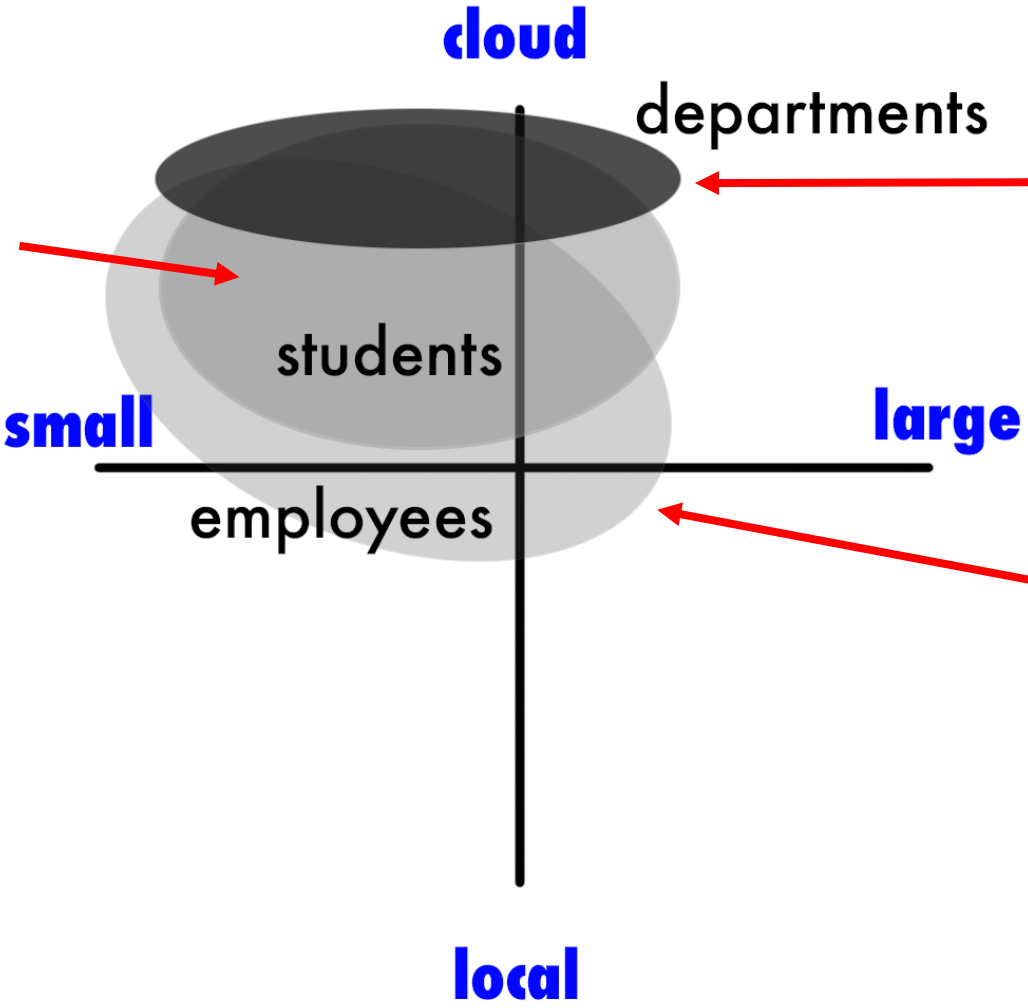
Google Workspace My Drive



Google Workspace Shared Drives

Future build on-premises to specification.

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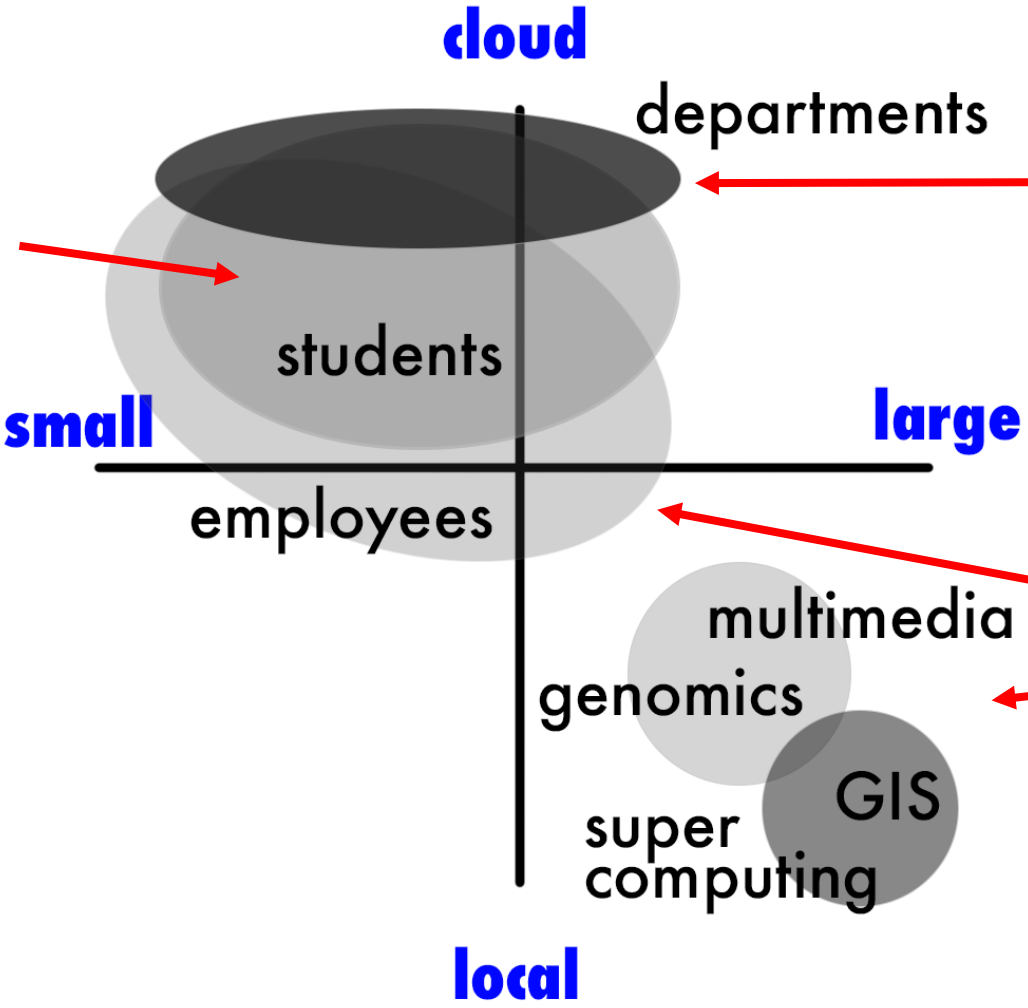
Google Workspace My Drive



Google Workspace Shared Drives

Future build on-premises to specification.

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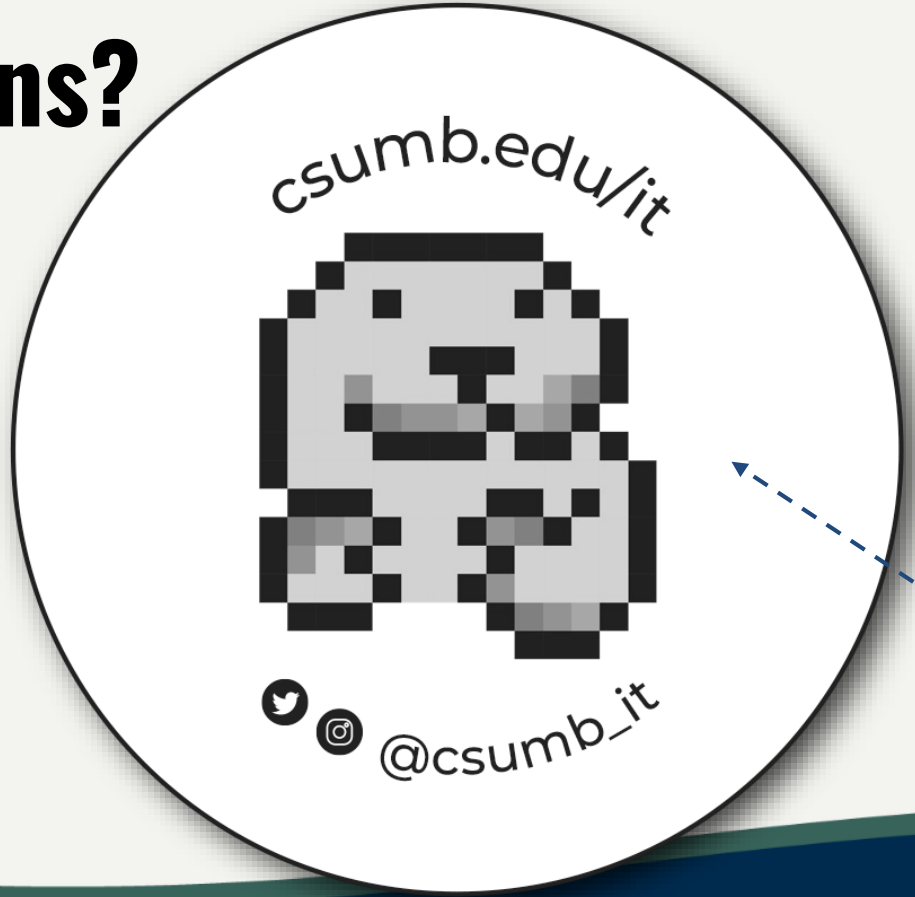
Questions?



Pixel Otter

Found at the top of every browser tab with csumb.edu

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DID YOU KNOW?

Venkat Paruchuru, Director – Operations Support and Innovation (OSI)

New Delegation of Authority(DOA) Rollout

- **What does DOA mean?**
- **Key features of the New DOA Rollout**
  - – All Funds
  - – Improved maintenance
  - – Integration capabilities with non-CFS applications
- **Anticipated Timeline**
  - – New form rollout scheduled for May
  - – Campus to submit the new form by July 1st
  - – Transition to the New DOA module in August

Next BOF & Finance Office Hours

Next BOF 04/19/2023

Accounting
Weekly on Fridays (03/17) at 10:30 a.m.
https://csumb.zoom.us/j/85920601537

Budget
Bi-weekly on Wednesdays (03/29) at 11:00 a.m.
https://csumb.zoom.us/j/87856562232

BSS
Bi-weekly on Thursdays (03/16) at 11:00 a.m.
meet.google.com/jbt-vrps-ofz

Please contact financeasc@csumb.edu for details.

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Thank you!