



2014 – 2015 ANNUAL REPORT

Office of the Executive Vice President for
Administration, COO & CFO

THE UNIVERSITY OF NEW MEXICO



Photos provided by Adan J. Serna, November 2015
Bachelor of Arts in Political Science and Communications



From the EVP for Administration:

The 2014–2015 Annual Report highlights the significant accomplishments and developments of the ten departments that report to the Executive Vice President for Administration (EVPA): Financial Services Division; Government and Community Relations; Human Resources; Information Technologies; Institutional Support Services; Planning, Budget, and Analysis; Police Department; University Policy; Safety and Risk Services; and UNM Athletics.

Over the past year, the EVPA has continued to examine and fine-tune its operations to promote maximum growth and productivity for the University. Even in an environment where student enrollment is on a steady decline, the University’s overall budget remains stable.

After several years of limited compensation increases, staff employees realized an average 2.5% compensation growth during fiscal year 2014-2015. This was made possible by an increased state appropriation of approximately \$5.5 million and an internal reallocation of funds of approximately 1% of the University’s Instruction and General fund. In addition, the University’s Employee Retirement program was bolstered by a recurring infusion of funds of approximately \$1.5 million to move towards full solvency. Health care premium increases were kept to a minimum and offset with plan changes, which protected employees’ take-home pay. Other fringe benefit costs were also held at the previous year’s budget levels. All other budgets were held flat, honoring the Board of Regents’ desire to minimize administrative costs and focus all additional incremental revenues directly on academic initiatives.

As shown in the detailed individual departmental reports, the EVPA remains committed to UNM’s 2020 Vision and Strategic Plan goal of ensuring long-term financial integrity and strength. Although the University continues to weather a volatile economic environment, the EVPA prides itself in leveraging efficiencies and other cost-cutting measures that allow investments in our students, faculty, and staff.

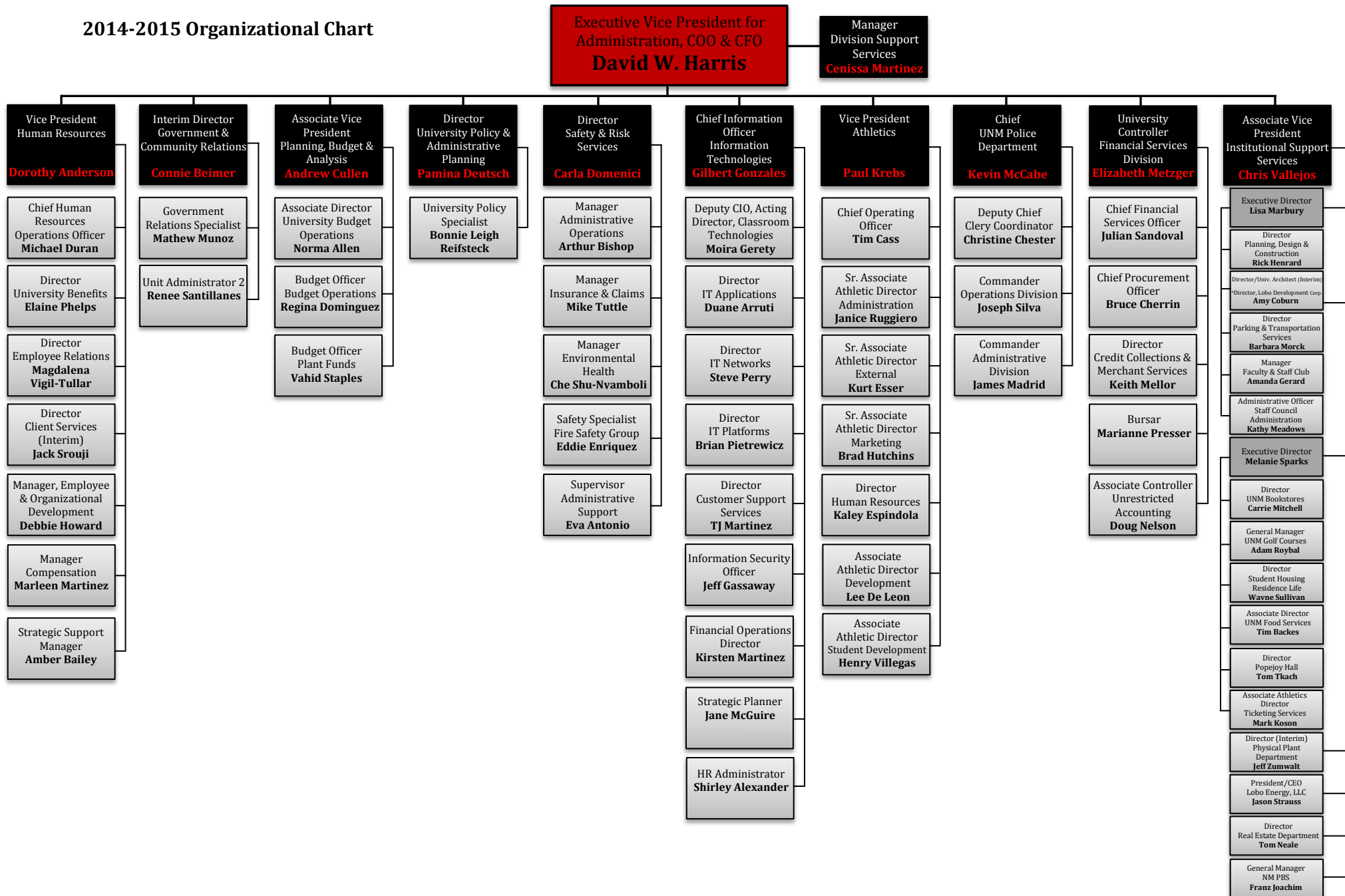
The 2014-2015 Annual Report highlights a vast array of accomplishments, current projects, and future plans for 2015-2016. We hope you enjoy reading and learning about our many strategic efforts in moving this institution forward.





Executive Vice President for Administration, Chief Operations Officer and Chief Financial Officer

2014-2015 Organizational Chart



2014-2015 Annual Report

Table of Contents

Financial Services Division	1
Government and Community Relations	57
Human Resources	68
Information Technologies	104
Institutional Support Services	125
Planning, Budget, and Analysis	269
Police Department	277
Policy Office	286
Safety and Risk Services	295
UNM Athletics	309



FY 2014-2015 Annual Report

Financial Services Division

Submitted by:

Elizabeth Metzger, CPA/University Controller

<https://fsd.unm.edu/index.html>

Mission

The Financial Services Division aligns its Statement of Mission with UNM2020:

The Mission of the Main campus Financial Services Division is to provide sound stewardship of UNM's fiscal activities while meeting the needs of students, faculty, and staff who are engaged in teaching, research, and community service activities at UNM.

The FSD's ongoing commitment serves to:

- Educate students, faculty, and staff about the compliance requirements associated with various UNM, state, local, federal, and agency policies concerning financial expenditures.
- Stay abreast of the latest in accounting standards and regulations, and apply those to its business practices.
- Deliver accurate, timely, and useful financial reports to UNM Leadership, and government constituencies.
- Actively support and document best business practices for all UNM financial activities in order to remain in compliance and to prevent audit findings.

Vision

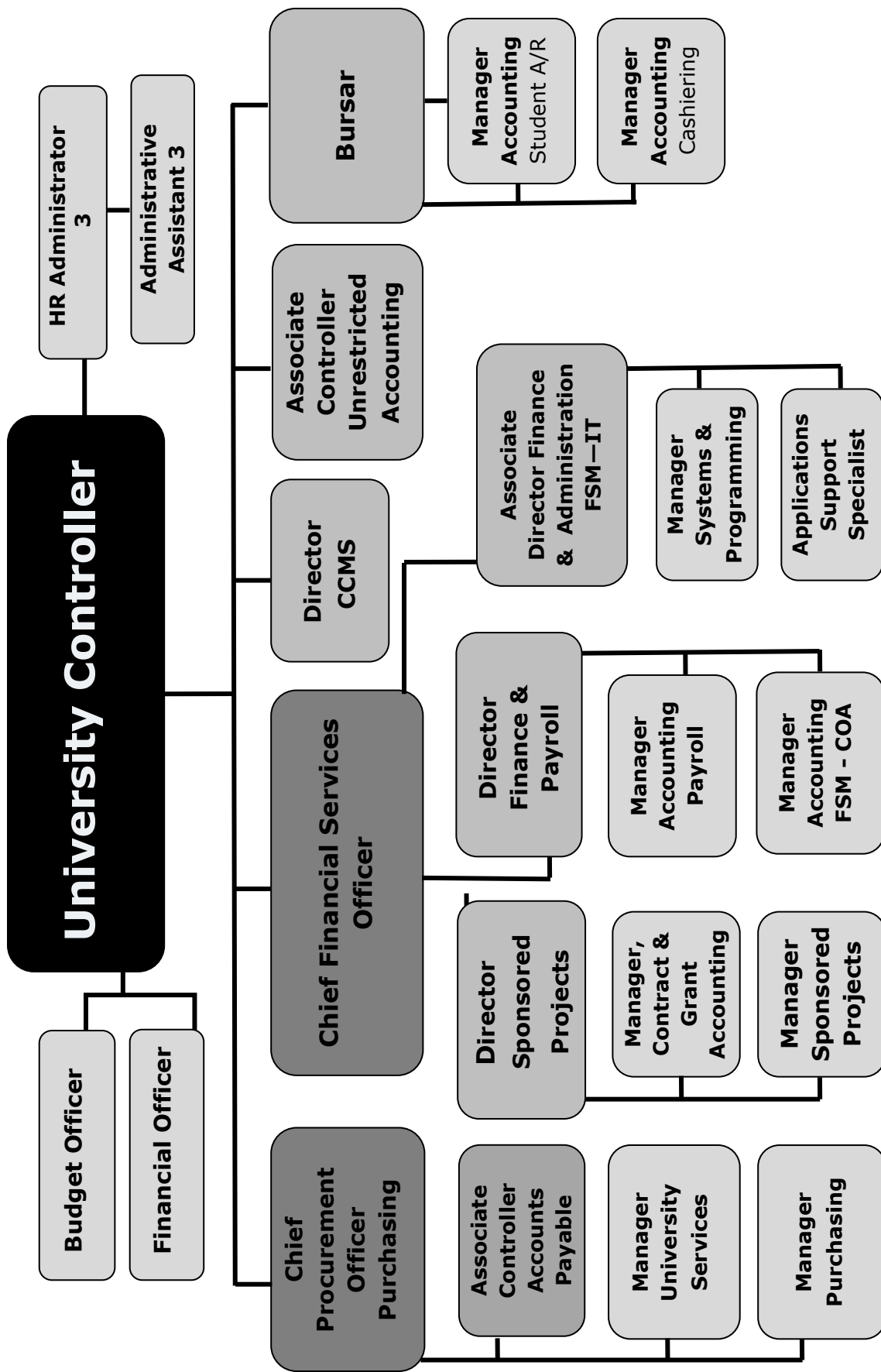
Division Culture:

- Integrity and high quality services.
- Accountability and social responsibility.
- Respect and effective communication.
- Customer Service focus for students, faculty, and staff.
- Recruitment of highly trained professional accounting, management, and procurement experts.

Financial Performance:

- Fiscal transparency through accurate and timely financial reporting.
- Fiscal year end processes that are seamless and cause the least disruption.
- Accuracy of financial data through vigilant Banner Finance maintenance and upgrades.
- Continual improvements to MyReports reporting tools, and Banner Finance data stores, to enhance end-user friendliness.

Organizational Chart



2014-2015 Annual Report

Table of Contents

I.	Executive Summary	5
II.	Overview	6
III.	Accomplishments & Significant Developments FY14-15	7
IV.	Current Projects	13
V.	Future Plans/Goals FY15-16	15
VI.	Department Staffing Information	17
VII.	Appendix A	19

I. EXECUTIVE SUMMARY

The Division of Financial Services continued its commitment to accountability, excellent customer service, and fiscal responsibility during the fiscal year ending June 30, 2015. The Main Campus Financial Services Division has continued to work closely with the HSC financial services staff, to ensure consistent application of policies and procedures. During the course of the fiscal year, the Division has diligently applied federal and state regulations and maintained a system of thorough internal controls that supported a strong bond credit rating and a clean audit opinion. The Division's FY 2014-2015 I&G Base Budget Allocation was \$7,012,524.00.

Below is a partial list of events and accomplishments demonstrating the Division's on-going commitments to outstanding service and transparency. Additional information can be found in the individual reports that follow this overview.

- The University Controller participated in Executive Cabinet meetings. As part of the UNM 2020 Vision, Responsibility Oriented Management (ROM) was further developed and involvement of the Finance Systems Management department continued in order to develop new Executive Summary reporting capabilities and Administrative Metrics.
- The Bursar's Office implemented several new technical functionalities which created efficiencies in its banking transactions, produced growth TouchNet usage, enhanced PCI Compliance and received an award for its customer service to UNM's military veteran student body.
- The VEBA Advisory Committee continued to met regularly and conducted an RFP in order to select an investment advisor.
- Banner Finance 8.9, AR 8.5, General and WebTailor 8.7, HRPR 8.11, eProcurement 8.3, Appworx, ODS 8.4, and Web Xtender Server were successfully implemented.
- The LoboTime Steering Committee worked regularly with the LoboTime core implementation team for a successful Phase II implementation in November 2014.
- The University conducted an RFP for a new Banking partner, and with weekly meetings with bank personnel and Finance Division managers, had a successful implementation and transition to U.S. Bank.

Other projects and activities that have occupied significant portions of the University Controller's time and effort include the following:

- Annual External Audit and Implementation of GASB 68
- Athletics Resource Board
- Budget Allocations
- Collective Bargaining Unit Payroll Deductions Issues
- Consultation with Budget Office for the 5% budget pullback for FY16
- Faculty Contracts and Payroll collaboration
- Student Tuition and Fees
- Federally Approved Misc. Fringe Benefit Debt and Investment Advisory Committee
- Emergency Operations Center Events – Ebola preparedness
- ERP Steering Committee
- Executive Cabinet

- HR Compensation Studies:
 - Accounting and Finance
- Internal Outreach:
 - Quarterly Manager Meetings and Goal Assessments
 - Service Award Distribution
 - KNME and KUNM External Audit Coordination and Oversight
 - Legislative Priorities and Appropriations
 - LoboTime Steering Committee
- Monthly Update Meetings w/Exec Staff:
 - Athletics
 - CIO and Director of Applications: Information Technologies
 - VP Human Resources
 - Office of Sponsored Projects/OVPR Management Meetings
 - Quarterly Executive Sponsor Meetings (LoboTime)
 - Sr. Executive Officer for Finance and Administration/HSC
- Multifactor Authentication for Direct Deposits Project Planning and Implementation
- MSU and Compensation Issues
- Payroll Overpayment Process Redesign
- PCI Compliance Implementations Work Group
- Strategic Goal Setting
- Union Dues/Deductions contract issues
- UNM Data Governance
- UNM Foundation Treasury Agreement Modifications
- Various Internal Audit Responses
- VEBA Advisory Board

II. OVERVIEW

For the Financial Services Division in general:

- The Division completed reorganizations of University Services and the Office of Sponsored Programs.
- As part of the UNM 2020 Vision, spearheaded Data Governance efforts for Finance.
- UNM LoboTime Phase II was implemented in November 2014.
- The Bursar's Office implemented beneficial changes regarding student disenrollments and reorganized to provide enhanced customer service for Student Accounting and Cashiering.
- The Voluntary Employee Beneficiary Association (VEBA) Advisory Board, continued to monitor, report, and conducted an RFP to select an investment trustee/advisor.
- Banner Finance Upgrade 8.9 was successfully implemented along with several others.
- Continued enhancements to MyReports.
- Planned, coordinated, and implemented conversion to U. S. Bank.
- Standardization of methods and procedures for the calculation of directly related experience for all new hires to the Division. All stakeholders are involved in the process to ensure transparency.

- Introduced a broader range of Behavioral Interview Questions (BIQs) for all Division recruitments.
- Service Level Agreement between FSM and OVPR for Cayuse Application and Support and Reporting for the Office of Sponsored Projects.
- Implemented SciQuest Total Supplier Manager and Sourcing Director to simplify vendor registration and sourcing; and SciQuest Sourcing platform for bids and proposals.
- Implemented new chip and pin purchasing cards for added security.
- Collaboration between the Office of Sponsored Projects and OVPR for data collection which resulted in a campus proposal submission deadline policy.
- Payroll collaboration with UNM Benefits to analyze changes mandated by the Affordable Care Act.

III. ACCOMPLISHMENTS & SIGNIFICANT DEVELOPMENTS FY14-15

Accounts Payable

- Implemented transition from Bank of America to US Bank including system updates, training & revision of SOPs.
- Implemented new Workflow Process for Subawards.
- Revised and documented Legal Settlement Process for more efficient tax reporting.
- Upgraded & tested new Banner General 8.7.1 VEVRAA/Appworx release.
- Accomplished several implementation milestones for the SciQuest AP Director project, expected to go live October 2015.
- Associate Controller presented at Emerging Topics in Accounts Payable at Colleges and Universities National Conference.

Bursar

- The Bursar's Office was awarded the Veterans Resource Center's Departmental *Making A Difference Award*. This prestigious award was presented to our office during UNM's Veterans Day activities in November. Specifically, this award honors Berlynn Ranck and Patti Love for their diligence and efforts when working with our Veterans and the various agencies that assist with educational funding for our military veterans and their families.
- The Bursar's Office played a major role in the University's bank conversion from Bank of America to U.S. Bank. Processes affected include: credit card functions, cashiering depository responsibilities, online ACH payments, ACH refunds, and UNM Marketplace payments. Marketplace includes the auxiliary units (Bookstore, Parking, and Housing).
 - Adopted new technical functionality via the On-Site Electronic Deposit technology offered by U.S. Bank. This mitigates potential fraud and ensures timely and accurate reconciliations.
- TouchNet Marketplace, an eCommerce payment solution for UNM continues to see growth in both transaction volume and revenue with an aggregate overall increase of nearly 3%. There was an increase of departmental use of the Marketplace from 59 departments to 75, an overall increase of 27%; uPay sites decreased from 93 to 73, but has shown an increase in revenue of 10%. uStores on the other hand have increased from 92 stores to 128 and show revenue growth upwards of 44%. TouchNet continues to provide a secure method for receiving online payments in a PCI compliant environment.

- Given the high demands necessary for PCI Compliance, the UNM Cashiering Department ceased accepting in-person credit/debit card payments, which resulted in a 5% increase in online payments.
- The Office reorganized. All Fiscal Service Techs are trained to assist customers in the Cashier Department *and* the Student Accounting/Lobby area. This provides flexibility during high volume times such as during open registration and enrollment cancellation.
 - Following the U.S. Bank implementation, HSC Unrestricted Accounting processes their deposits directly to U.S. Bank. This has decreased Cashiering transactions, allowing staff to increase customer service in Student Accounting.
- In response to the increasing complexity of the tuition and fee rates approved by the Board of Regents, the Bursar's Office worked diligently and quickly to simplify the Enrollment Cancellation Process. Beginning in Fall 2014 students were dis-enrolled only if they owed a prior semester balance of more than \$200. This drastically reduced the number of drops freeing up staff to work personally with a smaller population of students. Stress was reduced all around for students, Bursar/Cashiering staff, the Registrar's Office, and Financial Aid and Advisement.

Contract & Grant Accounting

- Revamped Grants Management presentation to include Uniform Guidance as well as modernizing the format from Power Point to Prezi. This presentation was then recorded and made available to new PIs as an EOD online course GMT 100.
- Compliance with Uniform Guidance:
 - Design and implementation of new sub award invoice workflow;
 - Design and quantification of variables on new FDP sub award Risk Assessment Questionnaire;
 - Replaced all references to circulars with references to Uniform Guidance in applicable UAPPMs;
 - Collaborated with Inventory Control to develop compliance guidelines for asset disposition under Uniform Guidance requirements;
- Developed variance analysis report for monthly report of expenditures and F&A generated.
- Completed the following financial reviews and audits:
 - NSF cash validation audit;
 - UNM's A-133 audit FY14;
- Met all departmental deadlines for year end and closed the year successfully:
 - Reconciliation of Balance Sheet and Ledger accounts;
 - LOC drawdowns and bank cash reconciliation;
 - Updated the billing information of all active sponsored awards to reflect the change from Bank of America to U.S. Bank, and redesigned the notification form included with monthly invoices. Followed up with outreach to individual agencies to make the final conversion;
- Extended contract and grants training to include OSP personnel on all topics of joint relevance.
- Completed testing of Appworx upgrade in September 2014, Finance 8.9.1 upgrade in October 2014, Banner Finance 8.10 upgrade in May 2015, WebCaster testing and Subaward Invoice Workflow development and testing from Spring through Fall 2015.
- Spearheaded departmental customer service focus initiative:

- o Toured constituent departments: Cosmiac, Electrical Computer Engineering, Biology, Anthropology, Maxwell Museum, and Earth and Planetary Sciences;
- o Provided individualized training on Contract and Grant administration to the Geography department;
- o Effort Certification compliance assistance via teleconferences or office visits to other departments as needed;

Credit, Collections, and Merchant Services

- CCMS successfully transitioned banking services from Bank of America to US Bank. This was accomplished with minimal disruptions to daily operations. Also transitioned was merchant card services, although not complete at year end, a number of complex compliance and software issues are being resolved in a timely manner. Developed and issued a new combined Banking and Merchant Card Services RFP; and evaluated respondents in order to select a new banking partner.
- Monitored Payment receipts from a \$27 million loan to Lobo Development Corp. at a 3% interest rate, beating market rates by ~ 200bps.
- Produced draft investment policies for the VEBA fund and the Foundation's investment of the unexpended endowed and non-endowed monies.
- Prepared the annual New Mexico Higher Education Debt Service Requirement certification reports for UNM branch campuses, which calculate the cash requirements to service local debt and are used by the Higher Education Department to certify mil levy rates for the next tax year.

Copy Center

- Maintained check production process for the Bursar's Office and Accounts Payable on daily basis.
- Worked in conjunction with Office of Support & Effective Teaching (OSET) to provide course materials to new faculty for UNM Copy Center services as well as the process to place orders for student course packs.
- Restructured management reporting lines in order to provide a more effective business structure.

CRLS

- Finished FY15 with a positive budgetary outcome (0.5%) that included a very slight increase in Off-Campus total sales and a decrease of total On-Campus sales due to a continued down economic environment.
- Increased ending inventory from \$232,047 to \$244,855 (5.5%) in order to better the serve same-day needs of the University.
- Reduced non-salary operational overhead cost by \$24,088 (53.8% decrease).
- Renewed yearly pricing agreements with CRLS vendors Biorad, Corning, Fisher, Life Tech, New England, Phenix, and Sarstedt. Renegotiated pricing for all Sigma products and substituted 6 sigma chemicals for other stocked vendor brands at a lower cost for the University.
- Reduced liquid helium costs to UNM by 43% due to a new pricing agreement with Matheson gas.

- Renewed the chemical pricing agreement for all EMD chemicals stocked at CRLS. This continued to support an overall cost advantage (10% to 30%) for all EMD chemicals stocked in the CRLS store.

Finance Systems Management – Operation Support Team, IT-Reporting, Network Support

- Successfully closed the 11th fiscal year in Banner Finance.
- Planned and coordinated the 8th integrated Fiscal Year end close with Banner Human Resources/Payroll and Budget modules.
- Managed the HR/PR rule class codes for HR/PR transaction posting to Finance as part of the HR/PR integration in Banner.
- Managed Banner Finance Luminis Channels to create a one-stop shop interface for Finance end-users that facilitates pushing of information and processing activities in an easy to use interface.
- Planned, coordinated, participated and managed key system upgrades to include the Finance 8.9, AR 8.5, General and WebTailor 8.7, HRPR 8.11, eProcurement 8.3, Appworx, ODS 8.4, and WebXtender Server implementations.
- Planned, coordinated and participated in the conversion to US Bank, including system setup and configuration changes.
- Demised FastInfo and set up a new support module for FSD to improve internal efficiencies and provide good customer service to campus.
- Participated in the planning, scheduling, maintenance, and support of the seventh and eighth online Banner Effort Certification (EC) reporting, including the development of setup and load scripts for key EC tables for pilot groups identified.
- Implemented an integrated solution to manage the upload and approval process of massive journal entries at the University more efficiently and effectively, including demising the FUPLOAD process.
- Participated in the development of an integrated solution to upload journal entries for SciQuest internal requisitions at the University more efficiently and effectively.
- Completed the development of an integrated solution to manage garnishments at the University more efficiently and effectively.
- MyReports Enterprise BI/Reporting Enhancements for Finance and Payroll:
 - Designed and developed a new Excel file upload capability for report writers in Departments;
 - Report Caster – Planning, coordination, and configuration on rolling out new functionality to allow users to schedule and email reports to users' inbox;
 - Upgraded Webfocus to the newer 8002 release;
 - Upgraded ODS reporting database to the newer 8.4.1 release by coordinating efforts between IT and Finance functional units;
 - Enhanced MyReports portal for better user experience;
 - Published training materials, SOPs, CBTs and offered in class working sessions for report writers on campus;
 - Maintained and updated MyReports Info web site for Finance and Payroll;
- Spearheaded Data Governance efforts for Finance; developed a governance structure; identified data stewards for different sub-modules of Finance; coordinated efforts to develop and publish a new data dictionary for Campus report writers/power users.
- Modified and enhanced Chart of Accounts application for changing business needs and in

anticipation of a shift in support of current technology.

- Developed/Enhanced the following Finance and Payroll Reports:
 - Vital error report for Payroll;
 - NIH Salary Report;
 - Annual Leave Accrual;
 - Close Out Workflow Report;
 - Unrestricted Aging;
 - General Ledger Detail and Summary;
 - Active BAR Query;
 - Contract & Grant Executive Summary;
- Implemented Agile SCRUM project management approach for:
 - Managed Finance Operational Data Store (ODS) to include: Custom Finance ODS refresh (ETL) processes, scheduling and administration, view reconciliation, troubleshooting, and enhancements;
- Managed application upgrades including Workflow 8.1, WebFOCUS 8009, ODS 8.4.1 for Finance and Payroll.
- Generation of weekly campaign progress reports for United Way campaign 2014.
- Procurement Initiatives:
 - Implemented SciQuest total Supplier Manager and Sourcing Director to simplify vendor registration and sourcing and further integrating those functions with the rest of the procurement process;

Inventory Control

- Began efforts to collect equipment's missing serial and model numbers to keep better audit trail of the assets. This will help departments efficiently perform inventories (accounting for the right assets and identifying discrepancies) and reduce errors when equipment is sent to surplus.
- Collected 100% of the missing and off-campus asset location. This allows for accurate reporting of UNM assets.

Office of Sponsored Projects

- Development of a campus proposal submission deadline policy.
- Created an OSP process to identify and track Non Research related awards.
- Created an Electronic Research Administration (ERA) listserv for all Cayuse related correspondence.
- Completed Cayuse SP 3.1 upgrade.
- Coordinated a Principal Investigators and Research Administrators Scholarly event in December 2014 to highlight and celebrate the research effort being done on campus.
- VEVRAA & Section 503 planning team, for OSP and CGA additional subcontract clause incorporation as well as Vendor PO clause.

Payroll

- Launched a new Garnishment tracking and management system.

- Three Payroll staff members took and passed the Certified Payroll Professional (CPP) certification examination and are now CPPs.
- Added four departments with just under 1,000 employees to LoboTime.
- Switched from a third-party hosted server to a Kronos hosted server for LoboTime.
- Collaborated with UNM Benefits to cease VEBA deductions for new hires after FY15.
- Developed a process to bill Full VAs for taxes owed on taxable benefits.
- Collaborated closely with UNM Benefits and analyzed new changes mandated by the Affordable Care Act.
- Implemented annual tax changes.
- Implemented ERB rate changes.
- Implemented VEBA rate changes.
- Implemented changes in Payroll associated with the conversion to USBank.
- Continued BDMS efforts.
- Implemented new email process to notify employees who have not yet signed up for direct deposit.

Print Management

- Continued increase in MFDs and Color devices as color is now more affordable and departments reduce their overall device footprint by driving more documents to MFDs versus printers.
- Continued increase in purchased printers/devices managed by the Print Management program through Maintenance Agreements that include toner along with service, parts and labor.

Purchasing

- Restructured University Services division for more efficient business processes.
- Implemented transition to US Bank including system updates, training & revision of SOPs.
- Implemented new SciQuest Sourcing platform for bids and proposals.
- Implemented new chip & pin PCards for added security.
- Revised Legal Settlement process for more efficient tax reporting.
- Completed successful upgrades of LoboMart SelectSite 14.2, 14.3 & 15.1.
- Accomplished several implementation milestones for the SciQuest AP Director project, expected to go live October 2015.
- Improved OIG/SAM Excluded Parties process in order to prohibit procurement with Federal excluded parties.

Taxation

- Provided analysis of UNM departments' activity and revenues for unrelated business income tax and governmental gross receipts tax.

University Services – Business Operations, Mailing Systems, Shipping & Receiving, Surplus Property, Records Management

- Created University Services Scorecard to monitor performance measures, improve organizational effectiveness, identify risks, and help make management decisions.
- Designed and implemented an electronic software application for Mailing Systems that handles the creation, workflow and status of over 600 Bulk/Print to Mail jobs per year.
- Modified and upgraded the Inventory Tools Application in order to more accurately track and verify assets for the entire University. Created an asset analysis tool and added automation capabilities to increase efficiency.
- Eradicated waste by eliminating the use of Vendor Postcards to save money on postage and labor in order to increase productivity and realize hard dollar savings of roughly \$2,000.
- Began “Paperless” initiative to save money on expenses, ensure data security, and reduce Mailing Systems footprint.
- Zero lost packages in FY15.
- 187% increase in the number of items sold in FY15 via online auctions that resulted in \$37,293 back to UNM Departments.
- Generated \$77,637 through Bentley’s Public Auction of Surplus items and electronics, 85% of those profits were remitted back to UNM Departments.
- Created paperless Surplus Property ticket/receipt that links directly to the University Services accounting database for billing purposes and provides email receipts to departments.
- Records Management created and implemented a paperless job ticket to obtain department signatures and create email receipts when boxes are delivered/picked up to improve tracking and eliminate paper.

Unrestricted Accounting

- Implementation of Non-Student Accounts Receivable billing (NSAR) for Main Campus departments

IV. CURRENT PROJECTS

Bursar

- Collaboration with Payroll to refine Employee Accounts Receivable processes.
- Analysis of New Enrollment Cancellation process for impact on receivable balances.

Contract & Grant Accounting

- Development of F&A Split query in MyReports.
- Cross-training and task integration between Contract & Grant Accounting and the Office of Sponsored Projects.
- Evaluation and development of training specific to Branch Campuses’ needs.

Credit, Collections, and Merchant Services

- Continue to evaluate and upgrade the University's merchant card system, and monitor fiscal agent banks, and functioning of the processing software.
- Continued oversight and direction of a PCI management team approach with UNM IT Security and the contracted Consulting Information Security Auditor to monitor all credit card processing centers on campus.
- Continue to develop and monitor three tranches of operating cash, thus maximizing earnings on the University's unrestricted operating funds.

Finance Systems Management – Operations Support Team, FSM-IT, and Network Support

- Continued use and refinement of Automic (Appworx) scheduling software for creating and managing calendars for the automated daily & nightly finance operations and month end finance pre-close and close operations.
- Development in process for a Workflow to request the terminations of indices in Banner and provide end users validations on open items.
- Discussion and Planning for Data Classification Initiative.
- Finalize Travel and Expense Management RFP requirements and specifications and authorized posting of RFP.
- Cayuse Application Support & Reporting for the Office of Sponsored Projects.
- Continued Finance report development, maintenance, reconciliations, and continued enhancements using WebFOCUS and ePrint.
- Multiple projects in progress:
 - Automation of HED/FTE view creation process;
 - Chart Of Accounts Workflow;
 - Shared Service Center Workflow;
 - Executive dashboards for Research administration reporting;
 - AIX to Linux move of Banner and ODS databases;
 - New Vital Error Process;
 - President's Office Data Governance Initiative;
 - AP Director Project;

Office of Sponsored Projects

- Cayuse Related:
 - Re-designing and evaluate how agencies are set up in Cayuse Backbone to include the agency Banner ID as an identifier;
 - Re-designing drop down menu options to include only meaningful and relevant information;
 - Revamp training materials for Cayuse SP including an on-line training module;
- Development of pre- and post-award training specific to and for the Branch Campuses.
- Development of employee resource manual, standard operating procedures for OSP processes and training for new and existing OSP staff.
- Improvement in award set up process to reduce time spent on the process.
- Increase OSP visibility and communication between staff and PIs/Chairs/Deans.

Payroll

- Continue DUO implementation to allow online updates to direct deposit information.
- Continue LoboTime implementation as new departments elect to use the system and prepare for upgrade.
- Continue to evaluate new Garnishment tracking and management system.
- Continue to work with other Core offices to improve and add actions to the EPAF.
- Banner Summer/Fall Bundle testing and upgrades.
- Prepare to automate the FullVA billing process.
- Participate in the Talent Management System project.
- Evaluate and Implement Outsourced Employment Verifications.

Print Management

- Data security continues to be addressed. All new agreements automatically and contractually include data security software for every leased and/or purchased device.
- In FY16, continue progressive developments to streamline processes: i.e. online quoting form, online printer authorization form, and billing process improvements.

Purchasing

- Ongoing monitoring, enhancements, and upgrades for SciQuest AP Director.

Taxation

- Continued communication with the University and Central Accounting offices to enhance UNM compliance with IRS & U.S. Homeland Security regulations. Continual updates to UNM Taxation website with current information regarding payment requirements to foreign nationals and state and federal taxes, which reduces UNM's tax liability exposure and improves compliance.

Unrestricted Accounting

- Continued growth of Non-Student Accounts Receivable billing (NSAR) for main campus departments.

V. FUTURE PLANS/GOALS FY15-16

- Work with Enrollment Management to continually train staff in all areas with regard to Bursar policies and procedures.
- Increase departmental cross-training among Accountants.
- Develop EOD training curriculums for Effort Certification and Subaward and Closeout Workflows.
- Continue collaboration with compliance offices to redesign campus trainings.
- Sub-award process – collaborate with OSP to streamline the current process, including access to an electronic version of the scope of work for FFATA reporting purposes.
- Move to integration with OSP by having open discussions of “hot topics” of relevance to both offices.
- Emphasize and investigate staff retention methods.

- Expand Controller Division Onboarding activities to include mentorship and individual department handbooks.
- Continue with ROM initiatives as requested by the University President.
- Revamp all 12 Financial Services Division websites to the UNM Template v2 to conform to the new web standard and UNM branding.
- Migrate all Financial Services files to an encrypted file server to further securing sensitive data.
- Test and revamp workstation imaging process to prepare for Windows 10.
- Rewrite Effort Certification report in Webfocus.
- Pcard exception form workflow.
- Lobocash preapproval form workflow.
- SUB preapproval form workflow.
- Cayuse Reporting Integration with Finance.
- Cayuse SP 3.2 Upgrade.
- Cayuse 424 Upgrades.
- Webfocus 8103 upgrade.
- ODS 8.5 upgrade.
- Pre and Post Award Integration workflow.
- Implement ePayables in Banner with Bank of America.
- Create an invoice upload process in LoboMart (SciQuest) using OCR scanning to reduce the need for manual invoice entry.
- Improve quality controls by setting up a process where the proposals that are submitted are reviewed by a supervisor before they are submitted to the sponsoring agencies.
- Sub award process – collaborate with post award to revamp and streamline the current process.
- Cayuse – Develop standard proposal and award reports for departmental use.
- Revamp Cayuse transmittal, to capture only relevant award set up information.
- Continue to develop training materials for departments on various OSP processes and related topics, such as Proposal, Award and Contract review, budget generation and best practices.
- Continue collaboration with compliance offices to revamp existing internal processes for Export control, Conflict of Interest, IRB.
- Participation in the Talent Management Implementation.
- Banner XE.
- Participation in New Travel and Expense Module Implementation.
- Re-enable online direct deposit.
- Implement new employment verification service.
- Additional automation of Payroll processes.

VI. DEPARTMENT STAFFING INFORMATION

Appointments of Senior Staff

Accountant 3

Karen Fromenthal	August 2014
Adrienne Griego	August 2014
Teresa Hammitt	March 2015
Alana Watts	April 2015

Applns Support Specialist

Bill Barringer	July 2014
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Chief Financial Services Officer

Julian Sandoval	September 2014
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Dir, Sponsored Projects

Rosa Gonzalez-Rosenblatt	September 2014
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Executive Project Director

Adam Weeks	January 2015
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Financial Analyst

Genevieve Cordova	July 2014
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HR Administrator 3

Valerie A. Darensburg	June 2015
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Mgr, Accounting

Trudi Flynn	March 2015
Jose Gonzalez	February 2015
Debora Selke	November 2014

Mgr, Administration Opns

Marcos Roybal	May 2015
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Mgr, Sponsored Projects

Isela Roeder	October 2014
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Sponsored Projects Officer, Sr

Christine Marquez	November 2014
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Supv, Fiscal Services

Jessica Alderete	August 2014
Jeremy Hamlin	February 2015
Patty McLaughlin	May 2015

Unit Administrator 3

Karyn Kitts

April 2015

Separations of Senior Staff

Accountant 3

Karen Fromenthal

February 2015

Debra McCoy

November 2014

Analyst/Programmer 3

Patrick Lopez

June 2015

Associate Controller

Josie Abeyta

December 2014

Associate Dir, University Svcs

Debra Fondino

January 2015

Financial Analyst

Christine Grant

November 2014

Sponsored Projects Officer

Diana Sargent

January 2015

Sponsored Projects Officer, Sr

Christine Marquez

April 2015

Lydia Salas

June 2015

Supv, Fiscal Services

Sarah Martinez

January 2015

Joseph Wrobel

August 2014

VII. APPENDIX A

ACCOUNTS PAYABLE

Prior Year Comparison			
FY14 – FY15			
	FY14	FY15	VARIANCE
Banner Direct Pay Invoices	268,974	256,827	-4.52%
Banner Regular Pay Invoices	27,408	25,910	-5.47%
Total Invoices Count	296,382	282,737	-4.60%
Checks	51,533	46,796	-9.19%
ACH Direct Deposits	33,557	34,670	3.32%
Wire Transfers and Foreign Currency Checks	484	555	14.67%
Total Disbursement Count	85,574	82,021	-4.15%
Total Disbursements Amount	\$717,038,720	\$778,128,947	8.52%
Total Pages Scanned/indexed	1,027,610	1,011,810	-1.54%

Accomplishments:

- Issued 2,969 1099-Misc tax forms and provided live support/assistance for recipients.
- Implemented transition from Bank of America to US Bank including system updates, training & revision of SOPs.
- Conducted monthly 'Employee and Organizational Development AP Direct Pay Labs' for Banner Finance users.
- Implemented new Workflow Process for Subawards.
- Revised Legal Settlement Process for more efficient tax reporting.
- Upgraded & tested new Banner 8.9.1 release.
- Upgraded & tested new Banner AR8.5 – Gen 8.7 Forms-Reports release.
- Upgraded & tested new Banner General 8.7.1 VEVRAA/Appworx release.
- Tested WebExtender BDM new Server upgrade.
- Held walk-in office hours each week to allow campus end-users to receive live, one-on-one help.
- Accomplished several implementation milestones for the SciQuest AP Director project, expected to go live October 2015.

- Amended standard operating procedures, job aids, and FAQs to coincide with evolving business processes.
- Redistributed work assignments for more efficient processing of workload.
- Upgraded training materials for Banner class instruction.
- Developed new training materials for new Accounts Payable staff.
- Revised Accounts Payable website.

Participated in:

- Institute of Financial Management Annual Accounts Payable Conference.
- Associate Controller presented at Emerging Topics in Accounts Payable at Colleges and Universities National Conference.
- Form 1099 Bootcamp and Certification Training Class.
- SciQuest SelectSite Next Level Annual Conference.
- New Mexico State Audit Rule Training session.
- Presented at HSC Research Administration Forum & Training (RAFT) meeting.
- Small Business Liaison Officer (SBLO) Training Conference.
- National Business Institute New Mexico Gross Receipts Tax seminar.
- Banner Finance Team Leads.
- Institutional Compliance Committee.
- DRE/IQ Focus Group.
- Procurement Division Manager's Meetings.
- Safety & Risk Services Loss Prevention Control Committee .
- Purchasing Department Small Business Fair.
- Purchasing/Accounts Payable Business Process Meetings.
- General Person DupBusters Committee.

BURSAR

**Prior Year Comparisons
FY 14-15**

	FY14		FY15	
	Trans	Dollars	Trans	Dollars
Cashier Receipts	89,395	\$214,994,625	73,994	\$187,720,729
LoboWeb Cr Card Pymts	40,065	33,417,875	58,465	46,013,000
LoboWeb ACH Pymts	25,835	14,306,922	26,662	15,180,637
LoboWeb Debit Pymts	37,214	17,592,946	23,003	10,279,302
LoboWeb MarketPlace Pymts	132,583	12,877,137	134,820	13,401,682
Total Receipts	325,092	\$293,189,505	316,944	\$272,595,350
LoboWeb Direct Deposit Refunds	49,099	\$ 115,916,574	46,753	\$ 105,365,722
Student Check Refunds and Student Short Term Loans	20,823	31,362,188	18,543	27,210,114
Total Refunds	69,922	\$ 147,278,762	65,296	\$ 132,575,836
		FY14		FY15
Tuition and Fee Revenue		\$ 146		\$ 142
Undergraduate Resident and Non-Resident		44		44
Course Fees		9		9
Total Revenue (to nearest million)		\$ 199		\$ 195

*Accomplishments:***U.S. Bank Conversion:**

- Within the past year our office played a major role in the University's bank conversion from Bank of America to U.S. Bank. The conversion included the Bursar's Office credit card functions, Cashier Department depository responsibilities, online ACH payments, ACH Refunds, and finally UNM Marketplace payments which includes the auxiliary units (Bookstore, Parking, and Housing). During this conversion our office was able to adopt new technical functionality via the On-Site Electronic Deposit technology offered by U.S. Bank. By instituting this technology the University is receiving same day credit for all check deposits received and is notified of any returned items deposited almost immediately (24 – 72 hours) following the deposit. This has allowed the UNM Bursar's Office to mitigate potential fraud and ensure time and accurate reconciliations.

TouchNet Marketplace:

- Within the past year TouchNet Marketplace, an eCommerce payment solution for UNM continues to see growth in both transaction volume and revenue with an aggregate overall increase of nearly 3%. Looking at the Marketplace through a microscope and excluding auxiliary units we can see there has been an increase of departmental use of the Marketplace from 59 departments to 75, an overall increase of 27%. In FY15 the number of uPay sites decreased from 93 to 73, but has shown an increase in revenue of 10%. uStores on the other hand have increased from 92 stores to 128 and show revenue growth upwards of 44%. These numbers speak volumes as with each new store or department taking advantage of the Marketplace the University benefits as this tool provides UNM a secure method for taking online payments in a PCI compliant environment.

Cashiering Department:

- In FY 13-14 the Cashiering Department ceased accepting in-person credit/debit card payments due to the high demands necessary for PCI Compliance. As a result, online payments increased by 5%. As indicated in the FY 13-14 annual report, the vast majority of our credit/debit card payments were made online prior to this change. Thus, the small percentage increase in online payments was not unexpected.

Staffing:

- In FY 13-14 the Bursar's Office was re-organized to better serve our customers. Currently, all Fiscal Service Technicians are trained to assist customers both in the Cashier Department as well as in the Student Accounting/Lobby area. This allows for fluid movement of staff based on need. For example, more staff is needed in the Student Accounting area during open registration. On the other hand, more staff is needed in the Cashier Department during Enrollment Cancellation. In addition, with the bank conversion, Unrestricted HSC is now processing their deposits directly to US Bank via a scanner. This, coupled with increased online transactions, has resulted in a decrease in Cashier transactions. Because our staff is trained in both areas, we are able to take advantage of the reduction in Cashier transaction to increase our customer service in Student Accounting.

Enrollment Cancellation:

- In response to the increasing complexity of the tuition and fee rates approved by the Board of Regents, the Bursar's Office set out to simplify the Enrollment Cancellation Process. In the past, students were required to comply with a complicated equation to prevent enrollment cancellation. It required a base balance, a minimum payment and a lack of any prior balance. The equation was difficult to understand and difficult to explain. Beginning in Fall 2014 students were only dis-enrolled if they owed a prior semester balance of more than \$200. This reduced the number of students scheduled to be dropped from the onset and allowed Bursar staff to work personally with a smaller population of students. As a result, the number of students dropped at main campus went from approximately 1,200 to less than 50 students. It also reduced the amount of stress on both the student population and staff in the Bursars, Registrar's Office, Financial Aid and Advisement.

2014 Veterans Resource Center Departmental *Making A Difference Award* Recipient:

- The Bursar's Office was awarded the Veterans Resource Center's Departmental *Making A Difference Award*. This prestigious award was presented to our office during UNM's Veterans

Day activities in November. Specifically, this award honors Berlynn Ranck and Patti Love for their diligence and efforts when working with our Veterans and the various agencies that assist with educational funding for our military veterans and their families.

Current Projects/Future Goals:

- Refine Employee Accounts Receivable processes (joint with the Payroll Department).
- Work with Enrollment Management to continually train staff in all areas with regard to Bursar policies and procedures.
- Analysis of new Enrollment Cancellation and the impact on receivable balances.
- Increase departmental cross-training among Accountants.

Participated in:

- Tuition and Fee Policy Committee.
- Advisement Institute Presenters.
- New Student Orientation Presenters.
- Presidential Scholarship Selection Committee.
- Residency Appeals Committee.
- General Person Data Standards Committee
- Campus Compliance Committee.
- Housing Appeals Committee.

CONTRACT AND GRANT ACCOUNTING*Statistics:*

Prior Year Comparison – Contract & Grant Accounting			
FY14-FY15			
	FY14	FY15	Variance
Total Active Awards*	1814	1847	1.82%
Total Expenditures	\$182,656,792.00	\$179,970,994.00	-1.47%
F&A Recovery	\$ 21,805,802.00	\$ 20,769,091.00	-4.75%
Total Receivables	\$ 16,487,168.00	\$ 19,590,920.00	18.83%
Claim on Cash	\$ 4,672,313.00	\$ 7,581,186.00	62.26%
Closed Funds	633	523	-17.38%

*Active awards during FY15

Accomplishments:

- Revamped Grants Management presentation to include Uniform Guidance as well as modernizing the format from Power Point to Prezi. This presentation was then recorded to be available to new PIs as EOD online course GMT 100.
- Compliance with Uniform Guidance:
 - o Design and implementation of new sub award invoice workflow;
 - o Design and quantification of variables on new FDP sub award Risk Assessment Questionnaire;
 - o Replaced all references to circulars with references to Uniform Guidance in applicable UAPPMs;
 - o Collaborated with Inventory Control to develop compliance guidelines for asset disposition under Uniform Guidance requirements;
- Developed variance analysis report for monthly report of expenditures and F&A generated funds.
- Completed the following financial reviews and audits:
 - o NSF cash validation audit;
 - o UNM's A-133 audit FY14;
- Completed and submitted NSF survey for FY14.
- Completed FARS for FY14;
- Completed PARs for FY15;
- Met all departmental deadlines for year end and closed the year successfully.
 - o Reconciliation of Balance Sheet and Ledger accounts;
 - o LOC drawdowns and bank cash reconciliation;

- Developed tracking system to ensure closed awards are placed in the review drawer on a timely basis. Awards are closed within 90-days of the project end date. Remained current on closeouts and closeout reviews.
- Completed post-audit reviews of all journal vouchers, 90-day memos on labor redistributions.
- Completed Effort Certification process for the periods July to December 2014 and January to June 2014.
- Reduced delinquent ONR reports by aggressively addressing pending items on outstanding reports on a monthly basis.
- Updated the billing information of all active sponsored awards to reflect the Bank of America to U.S. Bank change, including designed of notification form to include with monthly invoices. Followed up with outreach to individual agencies to make the final conversion.
- Extended contract and grants training to include OSP personnel on all topics of joint relevance.
- Completed testing of Appworx upgrade in September 2014, Finance 8.9.1 upgrade in October 2014, Banner Finance 8.10 upgrade in May 2015, WebCaster testing and Subaward Invoice Workflow development and testing from spring through fall 2015.
- Spearheaded departmental customer service focus initiative:
 - Toured constituent departments: Cosmiac, Electrical Computer Engineering, Biology, Anthropology, Maxwell Museum, Earth and Planetary Sciences;
 - Provided individualized training on Contract and Grant administration to the Geography department;
 - Effort Certification compliance assistance via teleconferences or office visits to other departments as needed;
- Met with the staff on a quarterly basis to check on performance goals and provide more timely feedback on work well done. Adapted the seven University value goals to be relevant and meaningful to the C&G department and to be measurable on performance reviews.
- Documented and/or revamped the following office processes:
 - Created procedures to address the flow down State of New Mexico Travel policies for DPI approval;
 - Created process and procedures for stipend payments on NSF REU awards;
 - Developed flowchart for routing of Kellogg agency emails for ease of processing by interfacing departments;
 - Developed flowchart for routing of sponsored & non-sponsored agreements;
 - Developed standard operating procedure for donated and loaned equipment;
 - Developed process to track NSF 2 month salary rule, including working with FSM-IT to develop query to identify PI's out of compliance;
 - Updated closeout memo for Liz's signature; this allows awards to be unilaterally closed within the 90-day timeframe;

Participated in:

- Research Administrators Network – development of agenda and monthly presentation of topics (RAN).
- Get Set and Reset Panel Discussion for OVPR.
- PI Grants Management Training.
- LEARN sessions.

- NSF 2/9th re-design group.
- C&G Management Meetings.
- US Bank Meetings.
- Research Accounting Meetings.
- Pre/Post Award Meeting.
- Sub-award Scrum Meetings.
- Award Closeout Meetings.
- CCMS/C&G Accounting joint procedure development meetings.
- C&G Supervisor Meetings.
- C&G/OSP Manager Meetings.
- Collection Committee Meetings.
- Banner Finance Team Leads.
- FSM Data Stewards Group.
- Collaborated with New Mexico’s research universities at New Mexico Consortium meeting in Las Cruces.
- Participation in Directly Related Experience (DRE) sessions.
- Held monthly staff meetings that continue to be used for in-house training on various subjects pertinent to the department’s activity. Additional daily and weekly meetings held to address ad-hoc items as they arose.
 - Subjects covered:
 - Liquidating encumbrances rather than adjusting them to zero on closed funds;
 - Tracking PI changes to comply with scope requirements of federal awards;
 - Keeping finance server cleaned to reduce storage needs;
 - Sabbatical concept, treatment and allowance on restricted funds.
 - NM Department of Finance and Administration per diem rules applicable to certain state awards;
 - New LoboCash approval process;
 - Fly America Act NCURA training video;
 - NIH conversion from LOC to subaccount pooled draws;
 - Urgency of processing Stop Work orders through OSP and departmental chains.
 - Non-Standard Payments routing through EPAFs;
 - Establishment of code word to alert coworkers to call 911;
 - Excel Vlookup and Pivot Table demonstrations;
 - Purchase requisitions for Staples and other UNM-approved vendors;
 - Vendor versus Agency;
 - A-133 audit letter received from sub-recipients;
 - IDC Rate compliant with UG – MTDCN5 (participant payments always excluded);
 - Closeout Reconciliation Form – New Statement Added;
 - Negative LOC draws;
 - F&A write up on fixed awards;
 - Effort Certifications;
 - SPQ guidance and required for services;
 - Explanation of “F&A Unallowable Account codes;”
 - Extra Compensation processed through EPAF;

- FFATA verifications;

Professional Development:

- NCURA Fundamentals of Sponsored Project Administration Workshop, Entire Staff.
- NACUBO Conference - F&A long form, Accounting Manager.
- NCURA Webcast – Uniform Guidance Challenges of Implementation, Entire staff.
- Society of Research Administrators International - Annual Meeting, Accounting Manager.
- Society of Research Administrators International – Uniform Guidance, Accounting Supervisor.
- Fred Pryor Seminars – Leadership, Team-Building and Coaching Skills, Accounting Supervisor and Manager.
- Kellogg Foundation training, Accountant 2s.
- Kellogg Award Webinar, Accounting Supervisor and Sr. Accountant.
- NSF Webinars – Various topics, Entire staff.
- EOD various leadership classes, Entire staff.
- CFO Academy ASM – Assessing Business Risks, Economic Outlook, Accounting Manager.
- Brown Bag Series at Faculty Club – Personal Enrichment, Staff.

In Process:

- Development of F&A Split query in MyReports.
- Cross training and task integrations between C&G accounting and OSP departments.
- Development and delivery of training specifically targeted for branch campuses.
- Banner Agency cleanup – merge or inactivate existing agency duplicates.
- Continual improvement and augmentation of staff training agenda.
- Embellish existing on-boarding process to achieve staff enthusiasm of learning, organization and efficiencies.

Future Recommendations:

- Develop EOD training curriculums for Effort Certification and Subaward and Closeout Workflows.
- Continue collaboration with compliance offices to redesign campus trainings.
- Sub-award process – collaborate with OSP to streamline the current process, including access to an electronic version of the scope of work for FFATA reporting purposes.
- Move to integration with OSP by having open discussions of “hot topics” of relevance to both offices.
- Emphasize and investigate staff retention methods.

COPY CENTER

Copy Center	FY15	FY14	FY13
Black & White copies	5,914,885	5,656,577	6,821,540
Color copies	645,946	566,612	415,505
Work orders	5,590	6,895	5,261
Customer accounts	615	665	698
Posters produced	1,073	1,169	1,022

- Continued to provide inexpensive UNM business cards in minimal quantities. Staff and faculty are able to order 100 cards for \$12 or \$15, standard versus executive. An average of approximately 5 to 7 orders is received per day.
- Maintained check production process for the Bursar's Office and Accounts Payable on a daily basis
- Revised UNM Copy Center web-site for more user-friendly interface. Customers are now able to upload large files without concerns for limitations of email systems. Customers are also able to submit orders of any kind online.
- Worked in conjunction with Office of Support & Effective Teaching (OSET) to provide materials to new faculty for UNM Copy Center services as well as the process to place orders for student course packs.
- Processed the annual IRS W2, 1099-MISC & 1098-T tax forms batches for the University.
- Upgraded workstations and software to accommodate the requirements and needs of customer departments as needed. Managed queues and jobs received directly from departments, assisting in print driver setups where needed.
- Produced an average of 89 posters per month. Our ability to Produce full-color banners or posters in a wide range of sizes at a low cost results in significant savings to the University when compared to previously used outside vendors.
- Participated in the annual Purchasing Vendor Fair to showcase services offered to the campus staff, students and faculty.
- Continued to manage expenses by taking advantage of cost savings opportunities. Made use of work studies and students where possible.
- Maintained communication with faculty to educate them on our Course Pack procedures. Course packs produced by the Copy Center save UNM, the faculty, and students money through reduced pricing and lower overall costs to classroom materials.
- Restructured management reporting lines in order to provide a more effective business structure.
- Purchased paper in bulk truckloads in order to resell to the UNM community at significant discount compared to outside vendors.
- Operated a LoboMart punch-out supplier site in order to facilitate paper sales directly to UNM departments.

CREDIT, COLLECTIONS, AND MERCHANT SERVICES

Accomplishments:

Banking:

- Provided treasury and special banking transaction services to the UNM campus for UNM receipt and disbursement systems. Electronic banking activity continued to increase from federal and state agencies as well as commercial vendors. Banking activities were maintained with financial institutions in the Albuquerque and branch campus areas including three disbursement and five depository accounts.
- During FY 15 the CCMS successfully transitioned banking services from Bank of America to US Bank. This was accomplished with minimal disruptions to daily operations. Also transitioned was merchant card services, although not complete at year end, a number of complex compliance and software issues are being resolved in a timely manner.
- Continued to upgrade the University's merchant card system. Monitored fiscal agent banks and functioning of the processing software.
- Continued evaluation of banking processes to gain efficiencies.

Investments:

- Continued to develop and monitor three tranches of operating cash, thus maximizing earnings on the University's unrestricted operating funds. As of 6/30/2015, operating cash balances consisted of: (1) the General Depository Bond Portfolio with a balance of \$118,554,468, (2) the Global Depository Bond Portfolio with a balance of \$166,570,822 and (3) US Bank Checking with a balance of \$108,522,192.
- Responsible for transitioning \$42 million of callable funds from the Foundation back to Main Campus.
- Monitored Payment receipts from a \$27 million loan to Lobo Development Corp. at a 3% interest rate, beating market rates by ~ 200bps.
- Continued the monthly investment fund reconciliations and BANNER related journal vouchers as well as producing monthly investment and cash flow reports which are distributed to the DIAC members.
- Developed and distributed monthly investment and cash flow reports to better monitor investment performance of the operating bond portfolios and inform DIAC members.
- Produced draft investment policies for the VEBA fund and the Foundation's investment of the unexpended endowed and non-endowed monies.

Collections & Debt Service:

- Billed over \$22.0 million to the State of New Mexico as reimbursements for expenditures on capital projects.
- Monitored and processed the semi-annual debt service payments for all outstanding University Bonds totaling \$164,425,134. This amount consisted of \$33,511,254 in scheduled principal and interest payments and \$130,913,880 in refunds.
- Prepared the annual New Mexico Higher Education Debt Service Requirement certification reports for UNM branch campuses, which calculate the cash requirements to service local debt and are used by the Higher Education Department to certify mil levy rates for the next tax year.

Financial Reporting:

- Prepared the GASB 40 footnote disclosure concerning cash and cash equivalent balances.
- Drafted and prepared the GASB 53 footnote disclosure regarding derivative interest rate swaps attached to the University’s variable rate bonds.
- Prepared audit footnote Schedule 9 detailing UNM’s pledged collateral, which provides security against bank failures for all account balances.
- Prepared audit footnote Schedule 10 detailing UNM’s individual deposit and investment accounts.
- Prepared a total of 33 audit FARS related to UNM’s outstanding bonds, operating investments and cash holdings.

Merchant Services:

- Served as Financial Services point person for campus-wide Payment Card Industry (PCI) compliance.
- Continued overseeing and directing a PCI management team approach with UNM IT Security and the contracted Consulting Information Security Auditor to monitor all credit card processing centers on campus.
- Provided oversight and was responsible for completion of the PCI required Self-Assessment Questionnaires (SAQs).

Banking Statistics:

Deposits processed
Processed ~ 7,800 deposits from various entities for UNM departments
Property & Construction JVs processed
Reviewed and processed over 1,400 payment documents and journal entries

Participated in:

- The Debt Investment Advisory Committee.
- Assisting the University Controller to invest and report on VEBA funds.
- Foundation Investment Committee – As a designee for the Executive Vice President.
- The PCI Steering Team.
- Financial Services Point Person for banking conversion to US Bank from Bank of America.
- The PCI Response Team which is responsible for detection of weaknesses within the University credit card processing system. When weaknesses are detected, the team rapidly responds with a short and long term solution. As such, card monitoring is a continuous process which covers areas such as non-encrypted data transmissions, firewall weaknesses, in-house card data storage and other PCI non-compliance issues.

CRLS/CHEM STORES

CRLS	Total Sales	Total CRLS Sales Invoices	Vendor Invoices	On-Campus % Increase (Decrease)	Off-Campus % Increase (Decrease)
FY15	\$2,015,576	13,551	5,552	(8.00%)	1.00%
FY14	\$2,160,626	15,934	6,226	(2.00%)	(2.80%)
FY13	\$2,274,054	14,026	5,555	(6.40%)	(6.23%)

CRLS	Total Orders Placed	Stock Orders	Customer Orders
FY15	4,006	785	3,221
FY14	4,816	793	4,023
FY13	4,057	636	3,421

- Provided same-day order fulfillment, diligent customer service and support with sales, ordering, delivery, and technical requirements for 512 on-campus faculty research accounts and 5 off-campus accounts.
- Finished FY15 with a positive budgetary outcome (0.5%) that included a very slight increase in Off-Campus total sales and a decrease of total On-Campus sales due to a continued down economic environment.
- Increased ending inventory from \$232,047 to \$244,855 (5.5%) in order to better the serve same-day needs of the University.
- Reduced non-salary operational overhead cost by \$24,088 (53.8% decrease).
- Submitted a bi-monthly report to UNM Safety and Risk Services detailing all CRLS sales of chemicals to UNM departments. SRS utilizes these reports for federal Homeland and the city of Albuquerque reporting requirements.
- Worked with VWR to review and finalize the Hotlist pricing agreement twice during the year – once in February and then again in July. Volume purchases were reviewed and larger discounts were given as compared to the 1st review of the Hotlist. VWR products for the CRLS stockroom were updated to delete discontinued, or slow items, and also to add new items.
- Maintained the VWR pricing agreement for all CRLS stocked bioreagents at a significantly lower cost. CRLS also added 4 new chemicals to stock. The pricing agreement continued to support a 20% decrease in the overall cost of all bioreagents to the University.
- Renewed yearly pricing agreements with CRLS vendors Biorad, Corning, Fisher, Life Tech, New England, Phenix, and Sarstedt. Renegotiated pricing for all Sigma products and substituted 6 sigma chemicals for other stocked vendor brands at a lower cost for the University.
- Reduced liquid helium costs to the University by 43% due to a new pricing agreement with Matheson gas.
- Renewed the chemical pricing agreement for all EMD chemicals stocked at CRLS. This continued to support an overall cost advantage (10% to 30%) for all EMD chemicals stocked in the CRLS store.

- Worked with VWR, Life Tech, Corning, and Kimberly Klark for various on-campus promotions to sell stocked inventory products.
- Continued to improve CRLS database functionality. This included changes to DFS stock and Pass -thru forms, and changes to the Inventory, Header All, and Header Cur tables. CRLS also made changes to reduce paper waste by programming a pdf export option for invoices and also by having a single page print option for invoices rather than the standard two pages.
- Imported a UNSPSC codes table into the CRLS database for all products stocked in CRLS inventory. We designated unique codes for all CRLS items stocked (over 2,300) in order to upload items into the Lobomart/CRLS catalog.
- Continued weekly CRLS staff meetings to review material data safety sheets for stocked chemicals, as well as safety procedures with handling and delivery of dewars, gas cylinders, and chemicals. We also reviewed chemical spills and containment procedures, as well as other ongoing and potential operations hazards.

FINANCE SYSTEMS MANAGEMENT (FSM)

FSM Operation Support Team

Accomplishments:

- Scheduled and maintained consistent and timely month and year-end closings for Banner Finance and subsidiary systems.
- Successfully closed the 11th fiscal year in Banner Finance.
- Planned and coordinated the 8th integrated Fiscal Year end close with Banner Human Resources/Payroll and Budget modules.
- Established and maintained the Fiscal Year/Fiscal Period parameters, System Control parameters, Chart Maintenance Parameters, and other Banner Finance operating controls that drive efficient system processing and provide for system integrity.
- Continued use and refinement of Automic (Appworx) scheduling software for creating and managing calendars for the automated daily & nightly finance operations and month end finance pre-close and close operations.
- Monitored Ellucian delivered control reports and developed automated monitoring tools to identify problems and out of balance situations requiring correction.
- Performed research and troubleshooting and led issue resolution for Banner Finance system and data problems as they arose. Many of the resolutions resulted in new procedures and/or technical enhancements to assist in managing issues or prevent their future occurrence.
- Managed the rule class codes that provide for system processing of finance transactions within the Banner Finance System. These rule class codes provide for both direct and indirect updates to the various ledgers in Banner, provide for system balancing, and also allow for edits and controls to prevent unauthorized postings to pre-determined chart segments.
- Managed the HR/PR rule class codes for HR/PR transaction posting to Finance as part of the HR/PR integration in Banner.
- Managed the University Chart of Accounts, including setups and maintenance for the following: Index, Fund Type, non-grant Fund, Organization, Program, Activity, Account Type, and Account.

- Managed Banner Finance Attributes for use in processing, reporting, and analysis, including account restrictions for use on DPEZ transactions and PCard reallocations.
- Analyzed and consulted with various departments on organizational changes including predecessor changes, new and terminated organization code setups.
- Managed document approval queues to provide for electronic routing of Banner Finance transactions for authorization and internal control.
- Managed the data load and suspense process for approved feeds to Banner Finance from University sales systems and other external systems, including Payroll and Encumbrance feeds.
- Managed user access to key systems through role assignment and monitoring. Provided system access for Banner Finance, Finance Self Service, Banner Budget, Operational Data Store, Xtender, and Banner Human Resources – Payroll.
- Managed NSF system reject capabilities for transactions on instruction and general funds, non-endowed spending, unrestricted research and public service funds.
- Managed Banner Finance Luminis Channels to create a one-stop shop interface for Finance end-users that facilitate pushing of information and processing activities in an easy to use interface.
- Planned, coordinated, participated and managed key system upgrades to include the Finance 8.9, AR 8.5, General and WebTailor 8.7, HRPR 8.11, eProcurement 8.3, Appworx, ODS 8.4, and WebXtender Server implementations.
- Planned, coordinated and participated in the conversion to US Bank, including system setup and configuration changes.
- Prioritized the creation and continued maintenance of internal department standard operating procedures.
- Demised FastInfo and set up a new support module for FSD to improve internal efficiencies and provide good customer service to campus.
- Provided production support, communications and customer support to campus for various finance programs, processes, updates, outages and enhancements.
- Provided production support, communications and customer support to campus for Effort Certification processes.
- Managed Finance Org Code Security to restrict access to Finance data and provide better internal controls.
- Provided maintenance and support for the Finance Banner Training Database (BANTR), including security and performing additional processes to make confidential financial data anonymous.
- Website content management and support for Financial Services Resources, Fiscal Agent Network Group, and other Financial Services Offices, including the Financial Services SOP website and department specific websites.
- Continued development and maintenance of existing Job Aids to support the UNM Finance community.
- Management and coordination of annual external audit IT review.
- Management and coordination of internal audit IT Security review.
- Participated in development and testing of BAA programming to meet External Audit Requirements.

- Provided maintenance and support of SharePoint collaboration sites for Team Leads, Payroll, Project Prioritization Resource Leads (PPRL), Budget Offices, Contract and Grant Accounting and IT External Audit.
- Managed ongoing maintenance and support of proximity access in the UNM John & June Perovich Business Center that grants secure door access to Financial Services employees to physically restricted areas.
- Participated in the planning, scheduling, maintenance and support of the seventh and eighth online Banner Effort Certification (EC) reporting, including the development of setup and load scripts for key EC tables for pilot groups identified.
- Continued support and training to the HRIT team for Banner Security.
- Continuous and timely clean-up of security requests.

Development:

- Implemented an integrated solution to manage the upload and approval process of massive journal entries at the University more efficiently and effectively, including demising the FUPLOAD process.
- Participated in the development of an integrated solution to upload journal entries for SciQuest internal requisitions at the University more efficiently and effectively.
- Participated in implementation committee efforts for an institutional time and leave reporting solution using LoboTime (Kronos) for Phase II implementation.
- Participated in the development of ERP Project Prioritization process and evaluation of shared projects.
- Completed the development of an integrated solution to manage garnishments at the University more efficiently and effectively.
- BDMS Setup in BANP setup of B-H-EMPL, B-H-RETIREE, B-H-COMP, B-H-BEN-QEVNT, B-H-BEN-GEN, B-H-BEN-DEP drawers for use by Human Resources and Payroll offices, including group security, document level security, document type setups.
- Development in process for a Workflow to request the terminations of indices in Banner and provide end users validations on open items.
- Portal Governance Upgrade Committee.
- Participated in the selection of an on-line employment verification solution.
- Coordination and requirements identification of new AV equipment in conference rooms 2300 and 3019.
- Participated in the creation of MyReports Data Dictionary.
- Discussion and Planning for Data Classification Initiative.
- Directly Related Experience (DRE) and Interview Questions planning.
- Discussion and planning for Collective Bargaining Unit deductions.
- Finalize Travel and Expense Management RFP requirements and specifications and authorized posting of RFP.

Participated in:

- Banner Operations Leads (all modules).
- Banner Finance Team Leads.
- Human Resources/Payroll/Finance Reconciliation Team.

- Project Prioritization Resource Leads (PPRL), prioritization of projects for Finance, Budget, AR, HR and Payroll.
- Banner ERP Leadership Committee.
- ERP Authorizations and Security Team (EAST) Committee and Meetings.
- Portal Governance Committee.
- Interview Committee member for various Financial Services Departments and IT.
- Executive Steering Committee for LoboTime.
- Ellucian LIVE 2015.
- Council on Governmental Relations.
- NACUBO HEAF.
- Travel and Expense application discovery.
- Collaboration with HRIT, StuAuth, and IT security initiatives.

FSM-IT (Reporting, Workflows and Cayuse Application Support)

Accomplishments:

- MyReports Enterprise BI/Reporting Enhancements for Finance and Payroll:
 - Designed and developed a new Excel file upload capability for report writers in Departments;
 - Report Caster – Planning, coordination and configuration on rolling out new functionality to allow users to schedule and email reports to users' inbox;
 - Upgraded Webfocus to the newer 8002 release;
 - Upgraded ODS reporting database to the newer 8.4.1 release by coordinating efforts between IT and Finance functional units;
 - Enhanced MyReports portal for better user experience;
 - Published training materials, SOPs, CBTs and offered in class working sessions for report writers on campus;
 - Maintained and updated MyReports Info web site for Finance and Payroll;
- Spearheaded Data Governance efforts for Finance; developed a governance structure; identified data stewards for different sub-modules of Finance; coordinated efforts to develop and publish a new data dictionary for Campus report writers/power users.
- Modified and enhanced Chart of Accounts application for changing business needs and in anticipation of a shift in support of current technology.
- Developed/Enhanced the following Finance and Payroll Reports:
 - Vital error report for Payroll;
 - NIH Salary Report;
 - Annual Leave Accrual;
 - Close Out Workflow Report;
 - Unrestricted Aging;
 - General Ledger Detail and Summary;
 - Active BAR Query;
 - Contract & Grant Executive Summary;
- Developed/Enhanced the following Finance Workflows:
 - PCard Reconciliation Workflow;
 - Sub Award Invoice Workflow;
- Implemented a new GIT code repository (for internal use) to better manage different

- versions of the report source code files.
- Cayuse Application Support & Reporting for the Office of Sponsored Projects:
 - Developed a roadmap for the re-implementation of Cayuse;
 - Identified system configuration global settings and modified them as needed
 - Synchronized Cayuse's departments with Banner Org Hierarchy for consistent reporting;
 - Developed a new script/process to download data from Evisions' Cayuse Server;
 - Developed a new Datamart to host all the downloaded data for reporting;
 - Designed a new structure within Webfocus to develop and run queries by OSP and OVPR offices;
 - Developed queries to identify bad data and clean it;
 - Coordinated system issues between OSP and Evisions Support team;
 - Led the Cayuse 3.1 and 3.1.1 upgrade projects; worked with functional testers and ensured all the critical testing has been performed before going live
 - Met with OSP manager on a weekly basis for operational and strategic planning and coordination;
- Developed Guided Ad-hoc interfaces to streamline ad-hoc reporting. The power users on campus can now build ad hoc queries and reports with no report writing knowledge.
- Implemented Agile SCRUM project management approach for:
 - Managed Finance Operational Data Store (ODS) to include: Custom Finance ODS refresh (ETL) processes, scheduling and administration, view reconciliation, troubleshooting, and enhancements;
- Managed Finance report development, maintenance, reconciliations, and continued enhancements using WebFOCUS and ePrint; MyReports allow user-driven criteria to be used to generate reports as of the previous day's close.
- Published weekly Effort Certification ePrint reports and incorporated book-marking to allow selecting specific indices that have been built into the reports.
- Managed application upgrades including Workflow 8.1, WebFOCUS 8009, ODS 8.4.1 for Finance and Payroll.
- Generation of weekly campaign progress reports for United Way campaign 2014.
- Responsible for providing technical support to the following Access databases:
 - Inventory contact database for University services;
 - Fixed asset database for Property;
 - United Way database;
 - Banner Tax database;
 - Term Index database;
 - Staff Salary database;
- Provided on call support for fiscal year end close process.
- Enterprise Metrics Reporting (EMR) for Decision support: Refreshed data cubes on a monthly basis and reconciled against ODS.
- Maintained the following EMR dashboards:
 - Cascading Grant Total Overhead Return History Dashboard;
 - Cascading Total University Expenditure Dashboard;
 - Cascading Seasonal Total University Expenditure Dashboard;
 - Endowment Spending and Reserves Growth Dashboard;
 - Prior Years Reserves Trending Dashboard;
 - Total Expenditures Dashboard;

- Current Year Total Revenues and Expenditures with Prior Years Reserves Dashboard;
- Total Revenues Dashboard;
- Total Revenues and Expenditures Dashboard;
- Grant Total Expenditures Dashboard;
- Grant Total Overhead Return History- F and A Dashboard;
- Grant Total Revenues Dashboard;
- Cascading Grant Total Expenditure Dashboard;
- Cascading Total Revenues Dashboard;
- Built SharePoint sites, templates and forms for various FSD committees and project teams.
- Redesigned the load process for Grant ledger data in the ODS database.
- Procurement Initiatives.
- Implemented SciQuest Total Supplier Manager and Sourcing Director to simplify vendor registration and sourcing and further integrating those functions with the rest of the procurement process.
- Created a new process for internal billing for the IT Software catalog.
- Provided training on AP Director in addition to a focus group and solution configuration.
- Performed 3x/year SciQuest upgrades.
- Back up support for Purchasing's Data Manager for 2 months – answering phone calls, covering the Purchasing Process for Departments Lab, Purchasing & Accounts Payable Policies and Procedures class and the Grants Management Training class.

In Progress:

- Automate HED/FTE view creation process.
- Chart Of Accounts Workflow
- Shared Service Center Workflow.
- Executive dashboards for Research administration reporting.
- AIX to Linux move of Banner and ODS databases.
- New Vital Error Process.
- President's office Data Governance Initiative.
- AP Director Project - moving PO creation, invoice entry, approvals and receiving LoboMart (SciQuest) Go Live 10/19/15.

Future Goals:

- Regents Report.
- Rewrite Effort Certification report in Webfocus.
- Pcard exception form workflow.
- Lobocash preapproval form workflow.
- SUB preapproval form workflow.
- Cayuse Reporting Integration with Finance.
- Cayuse SP 3.2 Upgrade.
- Cayuse 424 Upgrades.
- Webfocus 8103 upgrade.
- ODS 8.5 upgrade.
- Pre and Post Award Integration workflow.
- Implement ePayables in Banner with Bank of America.

- Create an invoice upload process in LoboMart (SciQuest) using OCR scanning to reduce the need for manual invoice entry.

Participated In:

- Weekly MyReports (WebFOCUS) Meetings.
- Weekly Conference Call with IBI to discuss WebFOCUS issues.
- Weekly TAT (Technical Architecture Team) and EBAM (Enterprise Business Application Managers) Coordination Meeting.
- Weekly WebFOCUS Developers' Meeting.
- Weekly Appworx Conductors' Meeting.
- Biweekly Finance MyReports meeting.
- Biweekly Reporting Leadership Committee.
- Biweekly Managers Meeting.
- Monthly Team Leads Meeting.
- Monthly IT Agents Meeting.
- Quarterly FSD Managers Meeting.
- IBI WebFOCUS Summit.
- Educause Conference.
- Evisions Research Suite Conference.
- Cayuse User Group Conference.
- Oracle in-memory workshop.
- UNM Tech Days – Presented on WebFOCUS.
- Coordinated MyReports Report Writer working sessions.
- Offered InfoAssist Power User Training for Campus.
- Participated in monthly focus group for Sourcing platform conversion with SciQuest and other Higher Ed Institutions.

FSM-NS (Desktop and Server Administration)

Accomplishments:

- Finalized the Payroll BDMS scanning project by setting up a dedicated network of five computers and a multifunction scanner in a VLAN environment to hide the scanned data from the network traffic. This project is an ongoing goal of continuing improvement of securing sensitive data.
- Transitioned the electronic banking management of users and entitlements from Bank of America CashPro system to US Bank Singlepoint system. This transition involved three months of implementation meetings, testing, and trainings with US Bank to ensure approved users have proper banking entitlements.
- Took over the ownership and management of two Info-Ed virtual servers from Vice President for Research (VPR) office. This involved migration of the servers from Central IT datacenter to the Business Center datacenter including AD de-registration and IP and named record changed.
- Transitioned the electronic banking management of users and entitlements from Bank of America Cashpro to USBank Singlepoint.

- Installed and configured file server, Finjana, to store encrypted data.
- Migrated two Info-Ed servers from Central IT datacenter in to the Business Center datacenter.
- Install and configured a GIT repository server for versioning control for Webfocus report writing development and changes.
- Redesigned the backup process to improve efficiency on backing and restoring of virtual servers.
- Tested disaster recovery by restoring the FSD-CRIS virtual server, restoration of all Finance server's files and access rights to a new virtual server, and tested the failover of a two-node cluster VM host.
- Centralized inventory control of all FSD's computers, printers, and servers in to the Controller org code to improve tracking and time spent on paperwork.
- Assisted in migration of files and workstation management of President's Office to Central IT.
- Continued to improve data security to ensure confidentiality. Migrated all AP's banking and related files to the encrypted server, Finjana.
- Continued use of the automated ITIL-3 compliant web-based Absolute Help Desk system for managing workstation and other problems reported by computer users of the Financial Services Division and other supported departments.
- Solved 1,325 help requests and incidents from July 2014 through June 2015.
- Renewed a yearly Service Level Agreement Office of Contract Archeology (OCA) and Office of Graduate Studies (OGS).
- Kept 21 virtual/physical servers up-to-date with weekly operating system and security patching.
- Continued to support OCA and maintain their file server, computers, printers, and scanners.
- Continued to maintain and support computers and network access for Office of Graduate Studies, University Secretary, and Communication and Marketing.
- Updated how-to documents and standard operating procedures.

In Progress:

- Reviewing and testing the new UNM website template.
- Continuing to improving on the securing of all FSD's servers, workstations, and printing devices.

Future Goals:

- Revamp all 12 Financial Services Division websites to the UNM Template v2 to conform to the new web standard and UNM branding.
- Migrate all Financial Services files to an encrypted file server to further securing sensitive data.
- Test and revamp workstation imaging process to prepare for Windows 10.

Participated In:

- Weekly – Datacenter Standard Policy Workgroup.
- Weekly – US Bank Implementation meetings (January to March).

- Bi-Monthly – Datacenter Standard Committee.
- Monthly—host UNMNUG (Novell Users Group) meetings.
- Monthly—IT-Agent (Level 3 Org IT representative).
- Monthly—IT-UNM (IT support agents).
- Monthly—IT-IA (Information Architect for Web Masters).
- UNM Tech Days.
- Quarterly - InfraGuard Meetings (FBI Security Information).
- Quarterly - FSD Manager Meetings.
- Novell Brainshare Conference.
- Technology Transfer Partner Conference (Novell Products Knowledge sharing with other Higher Education Institutions).
- SEPUSA Backup Administration Training.

INVENTORY CONTROL

Inventory Processes	FY15	FY14	FY13	FY12
Capital Inventory Additions	502	544	518	504
Value of Capital Additions	\$11,019,658	\$11,332,496	\$15,573,516	\$11,196,930
Inventory Computer Additions < \$5K	4817	4,594	4,721	4,608
Inventory Deletions	4344	4,701	2,609	6,746
Value of Deletions, at total cost	\$14,730,696	\$13,476,952	\$11,428,554	\$27,969,417

Accomplishments:

- Continued to streamline the inventory process improving the Inventory Tools (inventory management system) to fit our department’s needs, as well to better serve our customers.
- Began efforts to collect equipment’s missing serial numbers and model numbers to keep better audit trail of the assets. This will help departments efficiently perform inventories (accounting for the right assets and identifying discrepancies) and reduce errors when equipment is sent to surplus.
- Collected 100% of the missing and off-campus asset location. This allows for accurate reporting of UNM assets.
- Established a productive relationship with NM MVD correspondent in order to manage special situations or requests. Enhanced the record keeping documentation process in order to better keep audit trails, from the acquisition to the disposal of the vehicle.

Annual Physical Inventories	FY15	FY14	FY13	FY12
Annual Inventories Requested	2198	2092	2059	1989
Annual Inventories Completed	2059	2092	2059	1989
Number of Assets	48,528	46,490	46,395	42,497

Inventory Reviews	FY15	FY14	FY13	FY12
Inventory Reviews Requested	590	611	400	833
Inventory Reviews Completed	555	575	388	448
Number of Assets Reviewed	1711	2606	937	1844

- Continued electronic correspondence to all inventory contacts and requested electronic replies with supporting documentation. This serves well in UNM's sustainability effort and proves to be more cost and time efficient.
- Improved the on-time response rate from departments by sending Inventory Due Date Reminders (two weeks prior to the due date) and prompting departments to communicate issues in a timely manner.

OFFICE OF SPONSORED PROJECTS

Statistics:

Prior Year Comparison – Office of Sponsored Projects FY14 – FY15		
	FY14	FY15
Number of Proposals	1107	1158
Value of Proposals	\$ 518,454,514	\$402,628,927
Number of Total Research Awards	769	841
Value of Total Research Awards	\$ 94,661,278	\$123,435,563

Accomplishments:

- Development of a campus proposal submission deadline policy.
- Created departmental guidance on OSP operations and provided the information on our webpage, i.e. what actions require a cayuse record, budget template tool, additionally we added to our website handouts from the RAN meeting.
- Created an OSP process to identify and track Non Research related awards.
- Created an Electronic Research Administration (ERA) listserv for all Cayuse related correspondence.
- Revamped Grants Management presentation to include Uniform Guidance as well as modernizing the format from Power Point to Prezi. This presentation was then recorded to be available to new PIs as EOD online course GMT 100.
- Completed Cayuse SP 3.1 upgrade.
- Developed My Reports queries for Cayuse proposals and awards reports.
- Synced Departments in Cayuse with Department Organizational Hierarchy in Banner.
- Developed internal tracking sheets for staff to assist in their workload prioritization.
- Provided trainings to staff and campus via the RAN meetings and made them more robust adding more campus offices to share information that was impactful to the audience.
- Performed Quarterly reviews with each staff member based on performance goals beginning in 2015.
- Coordinated a Principal Investigators and Research Administrators Scholarly event in December 2014 to highlight and celebrate the research effort being done on campus.
- VEVRAA & Section 503 planning team, for OSP and CGA additional subcontract clause incorporation as well as Vendor PO clause.

In Process:

- Cayuse Related:
 - Re-designing and evaluate how agencies are set up in Cayuse Backbone to include the agency Banner ID as an identifier;
 - Re-designing drop down menu options to include only meaningful and relevant information;
 - Revamp training materials for Cayuse SP including an on-line training module;
- Development of pre- and post-award training specific to and for the Branch Campuses.
- Development of employee resource manual, standard operating procedures for OSP processes and training for new and existing OSP staff.
- Improvement in award set up process to reduce time spent on the process.
- Increase OSP visibility and communication between staff and PIs/Chairs/Deans.

Participated in:

- Research Administrators Network (RAN).
- PI Grants Management Training.
- Pre/Post Award Meetings.
- Associate Dean's for Research Meetings.
- Vice President for Research Weekly Staff Meetings.
- Monthly Managers Meetings.
- Quarterly Managers Meetings.
- Collection Committee Meetings.
- Vice President for Research Interviews.
- OSP Management Meetings.
- Weekly staff meetings - in-house training on various subjects pertinent to the department's activities.
- Subjects covered:
 - Proposal review – tips on reading solicitation to obtain pertinent information about specific proposal requirements;
 - Budget review – we addressed the NSF 2 month rule, checking listed consultants to make sure they are not UNM employees and to determine if a subcontract would be a better mechanism for the listed individuals. Checking fringe benefit rates and insurance;
 - F&A - topics included making sure full F&A is being budgeted and making sure we collect documentation from the sponsor when full F&A is not the policy of the sponsoring agency. We also addressed exclusions to the base, equipment, stipends, RA tuition and F&A split with HSC process;
 - Contract negotiations – Billing terms, fixed price Vs. Cost reimbursable award. Budget periods Vs. Award periods. Final and Progress reporting requirements. Award Set up, Proposal review, Compliance, Budget training, Sub awards, and Cayuse;
 - 2015 staff goals;
 - De-obligating and amending funds - obtaining post award initials on all de-obligations, correct way to set up de-obligation in Cayuse;
 - Proposal and Award Cayuse clean up processes;

- Campus Outreach:
 - o Visited various colleges and departments to meet face-to-face with PI's and department administrators each CGA serves; ChTM, CASAA, A&S, COE SOE, ISR, COSMIAC, Architecture & Planning;
 - o Also met with department and colleges with the changes in leadership to discuss OSP mission and vision. Arts and Sciences Department Administrators meeting, CASAA Department Administrator meeting, ECE, RWJ, COE, etc. ;

Professional Development:

- NCURA Sponsored Projects Administration Conference and Annual conference
- Federal Demonstration Partnership meeting
- NCURA Webcasts on various topics, such as Uniform guidance, NSF's PAPPG
- EOD Team Building class - all OSP staff – December 2014
- EOD Transformative Negotiation class – March 2015

Future Recommendations:

- Improve quality controls by setting up a process where the proposals that are submitted are reviewed by a supervisor before they are submitted to the sponsoring agencies.
- Sub award process – collaborate with post award to revamp and streamline the current process.
- Cayuse – Develop standard proposal and award reports for departmental use.
- Revamp Cayuse transmittal, to capture only relevant award set up information.
- Continue to develop training materials for departments on various OSP processes and related topics, such as Proposal, Award and Contract review, budget generation and best practices.
- Continue collaboration with compliance offices to revamp existing internal processes for Export control, Conflict of Interest, IRB.

PAYROLL

Prior Year Comparison – Payroll Department FY14 & FY15		
	FY14	FY15
W2s Issued	18,960	19,039
1042s Issued	97	96
Direct Deposits	261,077	262,308
Payroll Checks Issued	49,324	52,030

Document Amount and Count for FY15

Type	Amount	Checks	Direct Deposits	Checks & Direct Deposits
Original Checks/Direct Deposits	\$688,414,012.00	48,827	257,899	306,726
Reissued Checks/Direct Deposits	\$ 277,347.80	33	392	425
Adjusted Checks/Direct Deposits	\$ 4,349,600.07	3,049	3,455	6,504
Manual Checks/Direct Deposits	\$ 982,675.44	71	509	580
Voided Checks/Direct Deposits	\$ (162,845.99)	50	53	103
TOTAL	\$ 693,860,789.32	49,324	261,077	310,401

Accomplishments:

- Launched a new Garnishment tracking and management system.
- Three Payroll staff members took and passed the Certified Payroll Professional (CPP) certification examination and are now CPPs.
- Added four departments with just under 1,000 employees to LoboTime.
- Switched from a third-party hosted server to a Kronos hosted server for LoboTime.
- Collaborated with UNM Benefits to cease VEBA deductions for new hires after FY15.
- Developed and implemented an automated process to impute income for child life insurance.
- Developed a process to bill Full VAs for taxes owed on taxable benefits.

- Converted CAT leave donation process from Opinio to a Banner Self-Service.
- Continued parallel testing on new garnishment application and in cooperation with IT made appropriate corrections.
- Collaborated closely with UNM Benefits and analyzed new changes mandated by the Affordable Care Act.
- Implemented annual tax changes.
- Implemented ERB rate changes.
- Implemented VEBA rate changes.
- Implemented changes in Payroll associated with the conversion to USBank.
- Continued BDMS efforts.
- Banner Fall 2014/Spring 2015 upgrades, including testing and validation.
- Tested new earnings and deduction codes in all instances before migrating to production.
- Participated in the OGS task force to implement Lobo Contracts.
- Implemented new email process to notify employees who have not yet signed up for direct deposit.
- Participated in union negotiations.
- Implemented new shift differentials for Police Union resulting from union negotiations.
- In conjunction with other core offices, continued work on EPAF's for non-standard payments.
- Automated additional fiscal year end processes empowering Payroll to run processes independently of IT.
- Worked with Ellucian to correct rounding issue with pay distribution percentages (still ongoing –resolution is near).

Participated in:

- One Payroll staff member attended the American Payroll Association conference for educational institutions.
- Three Payroll staff members attended the American Payroll Association Preparing for Year-End and 2015 seminar
- Payroll staff attended various luncheons with speakers hosted by the local chapter of the American Payroll Association.
- Various Payroll staff members attended the annual statewide conference of the local chapter of the American Payroll Association.
- Payroll staff members viewed webinars on Ellucian Employee Profile, Exclusions from Social Security and Medicare Coverage, Multi State, Fringe Benefits and Affordable Care Act.
- Payroll staff members completed Continuing Education classes as well as Star 12 seminars.

Current projects:

- Banner Summer/Fall Bundle testing and upgrades.
- LoboTime Upgrade.
- Automating FullVA billing process.
- Talent Management.

Future plans/goals (2015-2016)

- Participation in the Talent Management Implementation.
- Banner XE.
- Participation in New Travel and Expense Module.
- Re-enable online direct deposit.
- Implement new employment verification service.
- Additional automation of Payroll processes.

PRINT MANAGEMENT

Print Management Program	FY15	FY14	FY13
Devices (Copiers, printers, MFD's) managed in program	770	710	659
Customer accounts / departments	417/313	404/335	393/324
Multi-Functional Devices / Color	556/345	504/242	490/202
Printers in Maintenance Agreements	211	206	169

Note: Devices = Multi-Functional Devices (MFDs) + Printers. Color unit numbers are included in the MFD number.

Accomplishments:

- Continued increase in MFDs and Color devices as color is now more affordable and departments reduce their overall device footprint by driving more documents to MFDs versus printers.
- Continued increase in purchased printers/devices managed by the Print Management program through Maintenance Agreements that include toner along with service, parts and labor.
- Data security continues to be addressed. All new agreements automatically and contractually include data security software for every leased and/or purchased device.
- During FY15, four (4) departments completed Print Management Assessments.
- Going into FY16, we are working on progressive developments to streamline processes: i.e. online quoting form, online printer authorization form, and billing process improvements.
- Overall Lease and Maintenance costs continue to drop year over year since the onset of the Print Management RFP 1465. Lease costs reduced by \$37,521.12; Maintenance costs reduced by \$55,854.50, totaling a **\$93,375.62** reduction in costs, *even with the number of devices increasing*. Charts provided below.

	FY15	FY14	FY13
Leases	\$2,011,611.04	\$2,049,132.16	\$2,097,051.76
Maintenance	\$153,847.81	\$209,702.31	\$215,714.24
Total	\$2,165,458.85	\$2,258,834.47	\$2,312,766.00

PURCHASING AND UNIVERSITY SERVICES***PURCHASING***

Prior Year Comparison – Purchasing		
FY14-FY15		
	FY14	FY15
RFPs Issued	74	51
IFBs Issued	10	5
Total Solicitations	84	56
POs Issued	6,891	6,405
COs Issued	3,926	3,397
P-Card/F-Card		
TOTAL \$	\$ 69,197,083	\$ 74,921,298
TOTAL # of Trans	181,505	171,277
Vendor Setups and Maintenance Requests	24,191	20,541

Accomplishments:

- Restructured University Services division for more efficient business processes.
- Implemented transition to US Bank including system updates, training & revision of SOPs.
- Implemented new SciQuest Sourcing platform for bids and proposals.
- Implemented process for securing University private data related to purchases/UNM vendors.
- Implemented new chip & pin PCards for added security.
- Revised Legal Settlement process for more efficient tax reporting.
- Hosted annual UNM Small Business Fair in order to encourage business with from small and minority-owned entities.
- Implemented new Workflow Process for Subawards.
- Utilized Cost Segregation program to obtain significant University savings on current and past construction projects.
- Completed successful upgrades of LoboMart SelectSite 14.2, 14.3 & 15.1.
- Used IRS TIN matching for 1099-MISC reportable Vendors to reduce annual IRS mismatch B-notices.
- Published and distributed Purchasing Newsletters for Banner Finance users.
- Enhanced Purchasing-specific on-line training for P-Card.
- Provided on-going classroom training for two monthly Banner Finance classes.
- Accomplished several implementation milestones for the SciQuest AP Director project, expected to go live October 2015.

- Held walk-in office hours twice each week, allowing campus end-users to receive live, one-on-one help.
- Improved OIG/SAM Excluded Parties process in order to prohibit procurement with Federal excluded parties.
- Increased involvement in Small Business initiatives.
- Revised and improved electronic desk procedures for Contract Specialists.
- Revised commodity code assignments for more efficient distribution of workload.
- Developed new web based training programs for Purchasing & Finance.
- Upgraded & tested new Banner 8.9.1 release.
- Upgraded & tested new Banner AR8.5 – Gen 8.7 Forms-Reports release.
- Upgraded & tested new Banner General 8.7.1 VEVRAA/Appworx release.
- Tested WebExtender BDM new Server upgrade.
- Updated/Revised SOPs/Internal Procedures.

Participated In:

- National Association of Educational Procurement (NAEP) Annual Conference.
- National Association of Educational Procurement Academy & RFP Institute.
- National Association of Educational Procurement District VI Annual Meeting.
- National Association of Educational Procurement Strategic Procurement Institute.
- National Association of Educational Procurement Federal Procurement Institute.
- National Association of Educational Procurement Innovators Forum.
- Small Business Liaison Officer (SBLO) Training Conference.
- New Mexico Purchasing Council.
- SciQuest SelectSite Next Level Annual Conference.
- Pro-Leadership Procurement Forum.
- Institutional Compliance Committee.
- Banner Finance Team Leads.
- Presented at Institute of Financial Management National Accounts Payable Conference.
- Emerging Topics in Accounts Payable at Colleges and Universities Conference.
- Form 1099 Bootcamp and Certification Training Class.
- New Mexico State Audit Rule Training session.
- Presented at HSC Research Administration Forum & Training (RAFT) meeting.
- National Business Institute New Mexico Gross Receipts Tax seminar.
- DRE/IQ Focus Group.
- Safety & Risk Services Loss Prevention Control Committee.
- General Person DupBusters Committee.

TAXATION

Accomplishments:

- Provided essential tax services to UNM departments, including tax research, foreign national payment analysis, and federal and state tax filing compliance.

- Continued communication with the University and Central Accounting offices to enhance UNM compliance with IRS & U.S. Homeland Security regulations. Continual updates to UNM Taxation website with current information regarding payment requirements to foreign nationals and state and federal taxes, which reduces UNM’s tax liability exposure and improves compliance.
- Provided analysis of UNM departments’ activity and revenues for unrelated business income tax and governmental gross receipts tax.
- Monitor NACUBO tax listserv, and others, for latest discussion among other universities
- On-going, as needed interaction with Internal Revenue Service.

Taxation statistics:

<p>Tax Returns Filed</p> <ul style="list-style-type: none"> State Governmental Gross Receipts Tax (monthly) State Water Conservancy Fee (monthly) State Alternative Fuel Excise Tax (quarterly) Federal Fuel Excise Tax Refunds (quarterly) Form 1042 return and over 275 1042S Forms for foreign nationals (annual) Form 990T - Unrelated Business Income Tax (annual)
<p>Taxes Paid</p> <ul style="list-style-type: none"> Governmental Gross Receipts Tax paid in FY15 = \$1,615,983 Compensating Tax paid in FY15 = \$3,196 UBIT tax liability for FY14 = \$61,464(paid in FY15)
<p>Documents Processed</p> <ul style="list-style-type: none"> Reviewed and Processed over 1,600+ payment documents to non-resident aliens Reviewed and Processed over 640 Foreign scholarship awards

Participated in:

- UNM Tax Information Sessions for International Students.
- Access to SEVIS International Student information.
- Assisted testing Banner 8.9.
- Foreign National Tax & Immigration Compliance Conference.
- IRS Unrelated Business Income Tax & Tax-Exempt Organizations seminar.
- National Association of College and University Business Officers – UBIT Tax Forum.
- Form 1042/1042S Codes and Filing – Thomson Reuters Online seminar.

UNIVERSITY SERVICES

Business Operations

Accomplishments:

- Created University Services Scorecard to monitor performance measures, improve organizational effectiveness, identify risks, and help make management decisions.

- Attended annual National Association of College and University Mailing Systems (NACUMS) conference in Minneapolis, MN to stay up to date with USPS changes and industry standards.
- Revised multiple departmental SOP's, processes and procedures and implemented quality control measures throughout University Services.
- Provided University Services department Managers and Supervisors with human resources support, performance management, financial analysis and decision making assistance.
- Designed and implemented an electronic software application for Mailing Systems that handles the creation, workflow and status of over 600 Bulk/Print to Mail jobs per year.
- Modified and upgraded the Inventory Tools Application in order to more accurately track and verify assets for the entire University. Created an asset analysis tool and added automation capabilities to increase efficiency.
- Successfully trained Accounts Payable and Copy Center staff on all month end activities due to the Business Operations restructure, including the migrations of respective systems to the Business Center.
- Continued support of Copy Center, Print Management and Inventory Control.
- Participated in Monthly Team Leads meetings
- Participated in LoboTime/Kronos payroll timekeeping meetings.

Mailing Systems

Mailing Systems	FY15	FY14	FY13
Outgoing USPS Mail Pieces (Excluding Bulk)	961,535	1,041,098	1,051,712
Incoming USPS Mail Pieces	1,395,300	1,485,050	1,555,525
Campus Mail	921,091	865,532	840,859
USPS Accountable Mail	59,882	52,845	59,375
Bulk/Permit Mail	1,726,406	1,819,973	1,704,679
Postage Total	\$801,041	\$936,916	\$890,268
FedEx Incoming	8,253	7,327	8,674
FedEx Outgoing	1,494	1,606	3,093

Accomplishments:

- Compressed campus route schedules to increase efficiency and timeliness in order better serve the entire UNM Campus.
- Created route books to increase delivery optimization and improve delivery timeliness.
- Revised delivery/sort times in order to increase productivity in the Incoming Mail Department.
- Eradicated waste by eliminating the use of Vendor Postcards to save money on postage and labor in order to increase productivity and realize hard dollar savings of roughly \$2,000.
- Reduced departmental overtime to remain financially responsible and established a schedule to provide equal opportunity for all employees to serve the campus on Saturday.
- Created new Meter Mail Supervisor position to manage the outgoing mail volume.

- Began “Paperless” initiative to save money on expenses, ensure data security, and reduce Mailing Systems footprint.
- Added new mail stop codes to better serve multiple UNM Departments.
- Continued processing and mailing Bursar Statements, Accounts Payable Checks, UNM’s W2s, 1098s, and 1099s.
- Continued relationship with a local Presort First Class Mail Program Vendor to save money on postage expenses.

Shipping & Receiving

Shipping & Receiving	FY15	FY14	FY13
Freight – Total Pieces	32,722	31,774	35,786
Weekly Average (Freight Received, Processed, Delivered)	629	611	688
Delivery Points (HSC Campus/UNMH)	203	249	275

Accomplishments:

- Zero lost packages in FY15.
- 80+ years of direct service and experience at UNM.
- Receive, process, and deliver between 2,000 and 3,000 packages monthly.
- Instrumental in delivering high value capital equipment throughout Health Sciences and North Campus.
- Work with 65 different freight companies including 12 Air Freight/Overnight companies, 20 local and international delivery companies and 33 overland trucking companies.
- Proven track record of efficiency and daily logistical success.
- Continued delivery of all clinical, overnight, and/or perishable freight within two hours of arrival.
- Continued success in delivering freight to customers on the same day an item is received.

Surplus Property

Surplus Property	FY15	FY14	FY13
Regents Report – Total \$ Value Deleted	\$4,268,510	\$3,191,111	\$2,726,967
Total Surplus Property Items (Inventoried/Non-Inventoried)	23,120	15,414	18,363
Inventoried Equipment	3,036	4,683	2,383
Non-Inventoried Equipment	20,084	10,731	15,980
Number of Pickups	1,552	1,185	1,340
Number of Drop-Off Items	1,814	1,597	1,999
Surplus Items Sold to UNM Departments	\$12,840	\$11,305	\$12,545
Online Surplus Property Sales	FY15	FY14	FY13
Number of Auctions	132	45	28
Number of Items Sold	1,966	684	2,872
Net Sales	\$48,975	\$48,202	\$65,684
Total Amount Remitted to UNM Departments	\$37,293	\$33,721	\$45,499
Operating System Installs/Campus Recycled	FY15	FY14	FY13
Number of Erasures/New Operating Systems	10	8	27
Amount Transferred to IT	\$300	\$240	\$900

Accomplishments:

- 49% increase in FY15 in total Surplus Property items.
- 87% increase in FY15 in Non-Inventoried Equipment (desks, chairs, miscellaneous).
- 187% increase in the number of items sold in FY15 via online auctions that resulted in \$37,293 back to UNM Departments.
- 34% increase in FY15 in total \$ value deleted on the monthly Regents Report that's presented at the Board of Regents Finance and Facilities Committee meeting.
- Generated \$77,637 through Bentley's Public Auction of Surplus items and electronics, 85% of those profits were remitted back to UNM Departments.
- Created paperless Surplus Property ticket/receipt that links directly to the University Services accounting database for billing purposes and provides email receipts to departments.
- Surplus Property maintained a two day turnaround on all pickup, drop off and delivery requests throughout the UNM Campus.
- Continued recycling efforts to remain environmentally conscious and reduce Surplus Property footprint.
- Improved audit trail of surplus items and facilitated reconciliations of auction consignment reports monthly.
- Developed showroom and drop-off hours to display, sell and accept Surplus Property to UNM Departments resulting in \$12,840 in sales in FY15.
- Continued collaboration with Information Technologies to ensure hard drive erasure to safeguard confidentiality for the security of UNM.
- Continue to provide the State Auditor with timely erasure reports on a monthly basis.

Records Management

Records Management	FY15	FY14	FY13
Total Inventory (Boxes)	16,255	15,840	15,164
Boxes Withdrawn	1,002	1,067	757
Boxes Removed & Destroyed	1,577	1,663	1,993
New Inventory (Boxes)	1,988	2,313	1,946
UNM Departments Serviced	101	128	197

Accomplishments:

- Records Management created and implemented a paperless job ticket to obtain department signatures and create email receipts when boxes are delivered/picked up to improve tracking and eliminate paper.
- Aligned with the State of New Mexico Records and Archives Department for retention, destruction and major daily processes.
- Continue to work with the State of New Mexico to properly shred and destroy all vital records that are eligible for destruction based on the retention schedules.
- Increase in total inventory (boxes) in FY15.
- Began process of on-site destruction for non-confidential records to save time and increase productivity.

UNRESTRICTED ACCOUNTING

Document/Process	FY12	FY13	FY14	FY15	FY14/FY15 Variance
Purchase Requisitions	4,879	4,703	4,324	4,147	-177 (4.1%)
Petty Cash (3)	321	271	246	264	+18 (7.3%)
NSP and other Compensation Docs.	443	486	509	256	-253 (49.7%)
Travel Advances (1)	181	151	113	83	-30 (26.5%)
Direct Pay Requests	24,937	26,575	25,443	24,733	-710 (2.8%)
Journal Vouchers	17,457	18,696	19,618	20,269	+651 (3.3%)
Scholarships (4)	4,272	4,723	5,630	6,191	+561 (10.0%)
Labor Redistributions	<i>Not available</i>	<i>Not available</i>	7,589	8,291	+702 (9.3%)
Total Documents	52,490	55,605	7,589 LR 55,883	8,291 LR 55,943	+60 (0.1%)
NSAR Billings (# invoices) (2)	359	807	878	2,331	+71 (8.8%)
NSAR Billings (million \$) (2)	\$0.887	\$2.501	\$1.130	\$4.925	-\$1.371 (55.8%)
NSAR Collections (million \$)	\$0.153	\$2.001	\$1.556	\$4.547	-\$0.445 (22.2%)
Equipment Additions (million \$)	\$13.6	\$16.4	\$12.2	\$11.4	-\$0.8 (6.6%)
Equipment Deletions (million \$)	\$30.0	\$11.4	\$13.5	\$10.7	-\$2.8 (20.7%)
(1) Travel Advances are also included in total Direct Pay Requests (2) UA started this process in March 2012 (3) UA started approving HSC petty cash in November 2014 (4) Scholarship numbers added to report starting with FY15					

Accomplishments:

- Continuous updating of Unrestricted Accounting website, including adding more informational material for departments (ongoing).
- Present monthly Travel Policies and Procedures workshop (ongoing).
- Continuous effort to recommend and implement “best practice” accounting methods across campus.
- Continued growth of Non-Student Accounts Receivable billing (NSAR) for main campus departments:
 - Converted departments being processed through Bursar’s office (IT/PPD);
 - met individually with multiple departments to assess needs and provide training;
- Completed required reporting of unclaimed property to the State of New Mexico.
- Completed required 1099-K reporting for University.
- Completed annual ER&R report preparation for Budget Office and State HED.
- Assisted in drafting revisions to update policy 2480 “Incentives for Program Participants.”
- Preparation of required “FARs” for use by auditors in annual financial audit.

- Developed process to ease documentation requirements in regard to services performed outside of U.S.
- Eliminated usage of travel advances; transitioned to PCard cash advance.
- Revised/simplified cell phone reimbursement program.
- Initiated creation of a “shared services center” for Main Campus.

Participated in:

- Team Leads Committee.
- Fiscal Agents Network Group; numerous updates sent via listserv.
- Banner upgrade testing.
- Attended NACUBO UBIT Conference in New Orleans in February.
- Attended “Ellucian LIVE” in New Orleans in April.



FY 2014-2015 Annual Report

Government and Community Relations

Submitted by:

Connie Beimer, Interim Director

<http://govrel.unm.edu/>

Mission and Vision

Mission

The Office of Government Relations serves as the central resource for campus and unit-based relationships with Local, State, and Federal elected officials, community, and opinion leaders.

Creating Awareness

- Establishing UNM as a resource for community and business development
- Strengthen visibility of the HSC as the States' Center for Medicine

Building Relationships

- Facilitate opportunities for UNM to develop strategic relationships with legislators, alumni, community, and business leaders
- Engage UNM in collaborative partnerships with business and community leaders

Generating Support

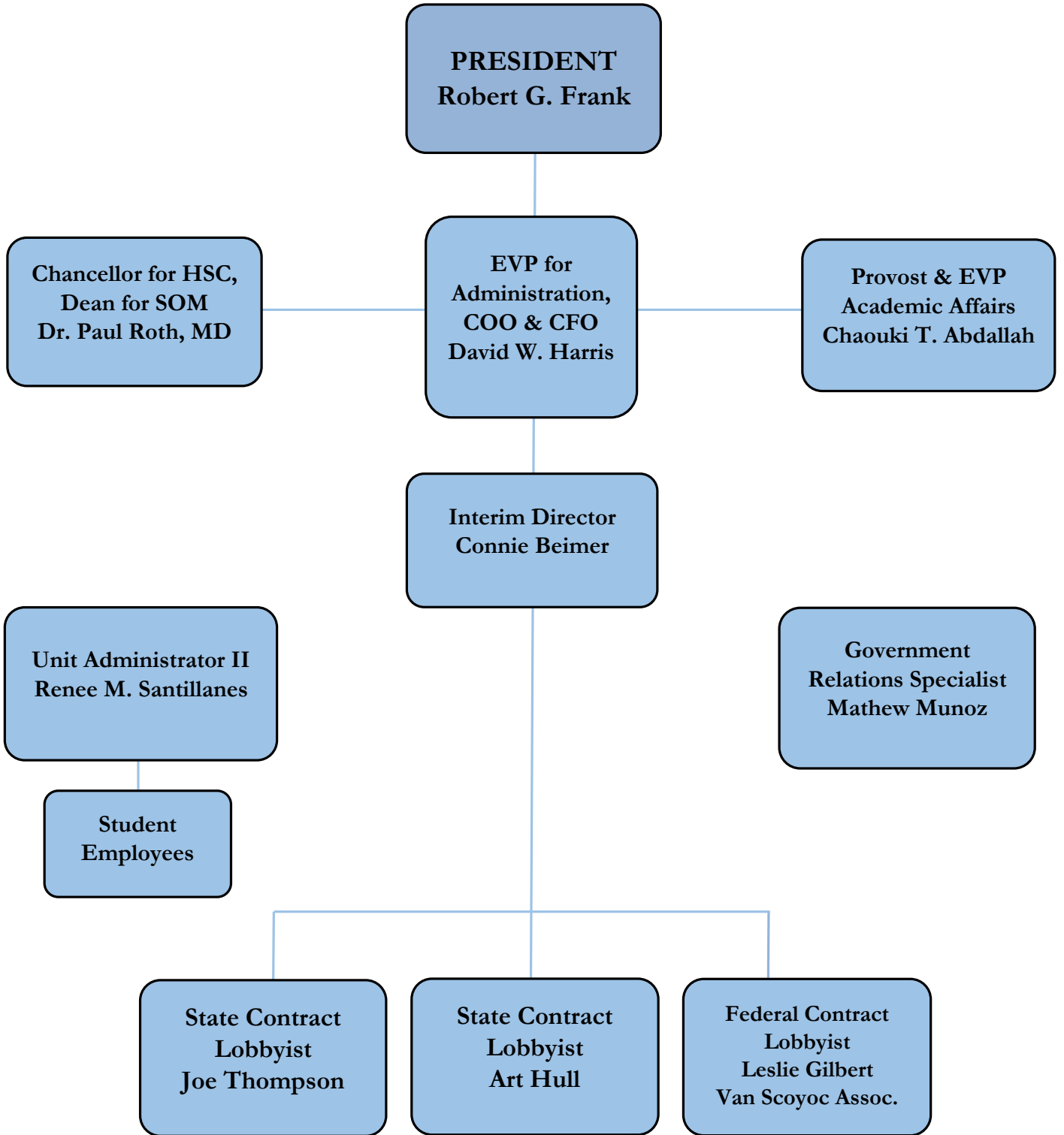
- Create opportunities for New Mexico residents and businesses to invest in UNM and the HSC as a high level research university and medical center

Vision

The Office of Government Relations will be recognized by internal and external constituencies and other organizations as:

- Knowledgeable and proficient about Local, State, and Federal political issues as well as legislative and budgetary processes;
- Informed about UNM and related policy substantive issues;
- Responsive to requests for assistance by external and internal stakeholders; and
- An effective advocacy operation to advance the University's mission.

Organizational Chart



2014-2015 Annual Report

Table of Contents

I.	Executive Summary	5
II.	Accomplishments FY 15	6
III.	Current Projects FY 16	9
IV.	Future Plans FY 17	11

I. EXECUTIVE SUMMARY

The Office of Government & Community Relations (OGCR) represents the interests of the University of New Mexico by serving as the University's lead advocate with elected and appointed officials, their staff, and government bodies. By building and strengthening relationships with local, state, and federal government officials, OGCR encourages investment in and support for UNM, its programs, and its initiatives. While OGCR is funded through various UNM programs and services, the I&G budget for this past year was \$287,594.00.

State Relations:

The 2015 legislative session commenced with falling oil prices and diminishing state revenues. The Legislative Finance Committee (LFC) and Department of Finance and Administration (DFA) revenue projections were estimated at \$283 million of "new money" in August 2014 and \$141 million of "new money" in December 2014. The two agencies released a new estimate in early February 2015 and revised the revenue estimate down to \$83 million "new dollars" and lowered the Severance Tax Bond capacity from \$231 to \$210 million.

- I&G Budget:
 - Main Campus, \$191,264,000, a \$2,116,100 increase or 1.1%
 - Health Science Center, \$62,556,600, a \$225,000 increase or 0.36%
 - Branch Campuses
 - Gallup, \$9,322,300, a \$50,000 increase or 0.54%
 - Los Alamos, \$1,886,000, a -\$19,100 decrease or -1.0%
 - Taos, \$3,488,300, a \$56,600 increase or 1.62%
 - Valencia, \$5,545,800, a \$50,100 increase or 0.9%
- Research and Public Service Projects
 - Main Campus, \$10,137,300, a \$360,000 increase or 3.7%
 - Health Sciences Center, \$33,825,000, a \$817,000 increase or 1.8%
- Severance Tax Bonds: 22 capital outlay projects were funded for \$10,476,500 across campus.
- Higher Education Endowment Fund Changes, House Bill 170, was signed into law and added \$5 million to the fund. This legislation changes how the money is distributed to institutions and creates competition within each sector of higher education in New Mexico.

Federal Relations:

The goal of the federal relations effort is to create awareness, build relationships, and generate support that will result in increased opportunities for student success, research, and healthcare. The federal environment has changed, creating opportunities for the university to work more closely with federal department and agencies. Our recent plans and efforts reflect that change. While there are challenging times with Congress, our Delegation continues to be helpful and supportive of our efforts. They have provided numerous letters of support for grant applications, have intervened on our behalf on issues and opportunities important to UNM, provided assistance to our programs including our global initiatives, research, and healthcare, and kept us informed of opportunities and issues impacting higher education and UNM.

II. ACCOMPLISHMENTS FY 15

State Relations:

- Analyze, advocate, and strategize on all legislative issues affecting UNM, including HSC, UNMH, Law School, Athletics, and Branch Campuses during the interim and legislative session.
- With Administration and eight constituency groups, engineered and evaluated UNM's outcomes from the 2015 New Mexico State Legislative Session for FY 2015 which ended March 2015:
- I&G Budget:
 - Main Campus, \$191,264,000, a \$2,116,100 increase or 1.1%
 - Health Science Center, \$62,556,600, a \$225,000 increase or 0.36%
 - Branch Campuses
 - Gallup, \$9,322,300, a \$50,000 increase or 0.54%
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- Severance Tax Bonds:
 - 22 capital outlay projects were funded for \$10,476,500 across campus.
- Higher Education Endowment Fund Changes, House Bill 170, was signed into law and added \$5 million to the fund. This legislation changes how the money is distributed to institutions and creates competition within each sector of higher education in New Mexico.
- Continuously met and worked with the senior management team, Executive Cabinet, each College Dean, Department Head, and the eight UNM constituency groups to continue to develop long term legislative agendas.
- Oversaw the legislative priority selection process and worked with the Provost, HSC Chancellor, and Executive Administration on identifying the 2015 Legislative Priorities.
- Met with government relation representatives from all eight constituencies on a monthly basis, presidents and deans' council quarterly and full boards on a bi-annual basis.
 - Worked with UNM Alumni Association on the strategy and coordination of the home legislative receptions.
 - Coordinated two student legislative orientation at the State Capital:
 - November 2014, 15 student participation
 - January 2015, 17 student participation
 - Provided support to the eight constituent groups with regard to legislative engagement.
- Developed 2015 interim committee legislative agenda.
- Monitored and attended 36 interim committees regarding legislative issues impacting UNM and higher education, and made over 25 presentations on UNM programs that are a service

to the state, and from faculty and staff providing expertise on issues and topics pertinent to various committees.

- Frequently met with elected and government officials to develop rapport and educate them on UNM issues.
- Staffed the President at Council of University President meetings.
- Collaborated with the Political Science Department on the OGCR student internship program for undergraduate students by providing student success funding for 13 students to participate in the program.
- Liaison for UNM to meet and work with budget staff at the LFC, DFA, and HED on a monthly basis and daily basis for budget development, recommendations and final appropriation/operating budget.
- Helped coordinate UNM Day at the State Capitol.
- Prepared President for budget hearing to the LFC prior to the beginning of 2015 Legislative Session.
- Led all UNM budget efforts during the 60 days session on behalf of the I&G and the new HED funding formula, special projects, capital outlay funding through the severance tax bond, and general obligation bond.
- From January to April, maintained the bill tracker for the legislative session. Monitored the daily update of over 500 pieces of proposed legislation action.
 - Legislation was grouped in the following categories: UNM Related, Main Campus, HSC, General Appropriation, Capital Outlay, Human Resources, and Other and made available on the department website for the UNM community.
 - Maintained an internal bill tracker highlighting the most pertinent bills for the legislative team to follow.
 - Identified and coordinated UNM presenters on impacting proposed legislation heard in committee hearings.
 - Coordinated the work with Legislative Council Services to draft UNM sponsored proposed legislation.
 - Tracked committee hearings and votes and worked with committee staff to schedule bills on committee agendas for hearings.
- During the 60 day legislative session provided a bi-weekly legislative briefing in Santa Fe to the UNM high level administrators, constituent group representatives, College Deans, and UNM community.
- Provided daily updates on proposed legislation progress, notified UNM constituencies of all committee hearings, and provided real time reports on committee actions through OGCR Department listserv.
- Participated and presented legislative updates to the senior management team, Executive Cabinet, Direct Reports and the Regents.

Federal Relations:

- Collaborated with HSC, Deans, and the Office of the Vice President for Research (OVPR) on the development of federal appropriation language priorities.
- Represented UNM and HSC in a leadership capacity on the government relations section of our national university member organizations.
 - Director serves on the HACU Government Relations Committee.
 - Director serves on the APLU Council of Governmental Affairs Executive Committee.
- Coordinated visits to Washington, DC to meet with NM Congressional Staffers and committee staffers on UNM federal initiatives, policies, and issues.
- Worked with federal relations lobbying firm on needed appropriations language
- Restructured the hiring of a federal relations lobbying team.
- Developed an extensive federal relations plan and a federal priorities package. The federal relations plan was drafted during the first quarter of the year and then updated regularly based on priorities on campus and meetings with Congressional committee staff and federal agency officials. The federal priorities package was developed based on university focus areas, information from the federal meetings, and input from the Congressional offices. The package included recommended appropriations language for six UNM Main Campus and HSC projects – Indians into Nursing, Indians into Medicine, SBIR Program, High Energy Density Physics, Nuclear Energy University Program, and Enhancing Technology Transfer Activities with the Department of Energy (DOE).
- Maintained communications and relationships with Delegation Members and their DC and NM staff.
- Coordinated efforts between the Department of Energy and UNM Student Affairs to fund DOE and implement UNM the Hispanic Youth Leadership Conference.
- Director facilitated roundtable with US DOE Secretary Moniz, Senator Udall, and business leaders on tech transfer.
- Congressional Delegation – Arranged and implemented numerous briefings, tours, and meetings for Delegation Members and their staff:
 - Congressional and Legislative Staff Academy on behavioral health and research.
 - Annual Advocacy trip to DC with President Frank and Executive Vice Chancellor Larson.
 - Senator Heinrich – briefings and tours at AML and HSC.
- Congresswoman Grisham – met with student government leaders and tour and briefing at Pathology
 - Senator Udall – met with the President and Executive Vice Chancellor.
 - Briefings for Chiefs of Staff and various staff members.
 - Regular meetings with district and state staff.
 - Brought staff to campus for events and briefings.
 - Organized special briefing on our veteran programs and services.
- Developed a monthly communication to the Congressional Offices.
- Provided input to our Congressional Delegation on matters concerning HSI- specific legislation, patent reform, federal agency research budgets, and research initiatives.
- Coordinated support letters for our key proposals.
- Requested Delegation Members sign on to letters of importance to UNM issues and programs.

- Worked with the Regional EPA office and its director to resolve issue with UNM’s water basin permit.
- Worked successfully with the EDA and Senate staff on the issues surrounding the release of EDA grant money for the Innovate ABQ project.
- Continued efforts to identify a site for the Chaco Canyon research station either through the State Land Office or the National Park Service.
- Developed and implemented plans, with the research office, to increase grant opportunities for our researchers.
- Worked successfully with Congressional Delegation and Congressional committee staff to have photonics as topic of large manufacturing funding opportunity (\$110 million). Worked with UNM team on photonics proposal to gain letters of support and work with USC on federal strategy of support.
- Arranged meeting for VPR to meet with key Congressional committee staff which resulted in agreement to assist the university with language that will help facilitate collaborations between the Labs and research universities and streamline processes.
- Organized a trip to Washington DC for researchers to meet with federal agency officials and program officers. Seven UNM researchers and research leaders participated in over 20 meetings in a two-day period. Early results – received advance notice of several topic areas for upcoming RFPs, gained insight on several issues important to advancing proposals.
- Worked with the Global office to develop plan to increase the number of international students attending UNM and assisted with issues for our international students. Targeted key countries with strong international programs and funding.

Publication and Outreach:

- Maintained and expanded the OGCR website to keep UNM informed of legislative issues affecting them
 - 20 pages of the website were viewed a total of 4,283 times
 - Maintained user friendly bill tracking system for the website
 - Maintained a live interactive calendar
- 2015 Legislative priorities booklet
- “How to talk to Legislators” pamphlet
- 2015 Session briefing cards
- State Legislators and NM Delegation district maps showcasing UNM Alumni, undergraduates, and graduates in their district
- Conducted the annual day-long Congressional and Legislative Staff Academy with the focus on the brain and behavioral health. UNM focus areas included Center for Neurological Disease, Brain and Behavioral Health Institute, Department of Psychology, Brain Safe, and Center on Alcoholism, Substance Abuse, and Addictions.

III. CURRENT PROJECTS FY 16

State:

- Continue to analyze, advocate, and strategize on all legislative issues affecting UNM, including HSC, UNMH, Academic Units, Law School, Athletics, and Branch Campuses during the interim and legislative session.

- Working with the students to draft legislation for their bake sale tax; advance the students legislation through the committee process during the session; and arranged a meeting for the students with the Governor regarding their legislation.
- Continuously met and work with the senior management team, Executive Cabinet, each College Dean, Department Head, and the eight UNM constituency groups to continue to develop long term legislative agendas.
- Oversee the legislative priority before and during the legislative session
- Continue to meet with government relation representatives from all eight constituencies on a monthly basis, Presidents and Deans' Council quarterly and full boards on a bi-annual basis.
 - Working with UNM Alumni Association on the strategy and coordination of the home legislative receptions in November 2015.
 - Coordinated the student legislative orientation at the State Capitol: January 2015
 - Continue to provide support to the eight constituent groups with regard to legislative engagement.
- Attend interim committees regarding legislative issues impacting UNM and higher education, and make presentations on UNM programs that are a service to the state, and from faculty and staff providing expertise on issues and topics pertinent to various committees.
- Frequently meet with elected and government officials to develop rapport and educate them on UNM issues.
- Staff the President at Council of University President meetings.
- Collaborate with the Political Science Department on the OGCR student internship program for undergraduate students by providing student success funding for thirteen students to participate in the program.
- Liaison for UNM to meet and work with budget staff at the LFC, DFA, and HED on a monthly basis and daily basis for budget development, recommendations, and final appropriation/operating budget.
- Help coordinate UNM Day at the State Capitol.
- Prepare President for budget hearing to the LFC prior to the beginning of 2013 Legislative Session.
- Lead all UNM budget efforts during the 30 days session on behalf of the I&G and the new HED funding formula, special projects, capital outlay funding through the severance tax bond, and general obligation bond.
- From January to April, maintain the bill tracker for the legislative session. Monitor the daily update of proposed legislation action.
- During the 30 day legislative session provide a weekly legislative briefing in Albuquerque to the UNM high level administrators, constituent group representatives, College Deans, and UNM community.

Federal Relations:

- Increase our efforts to impact legislation, grant opportunities, and appropriations language to provide wider opportunities for UNM's research and student services capabilities.
- Serve in leadership roles with our member university organizations to increase knowledge and opportunities for UNM.
- Organize trips to specific federal agencies, in coordination with the OVPR, for researchers looking to increase their grant opportunities
- Coordinate meetings with key UNM administrators to meet with NM Congressional Delegation Members and staffers and committee staffers on UNM Federal initiatives, policies, and issues.
- Work with federal relations lobbyists in Washington, DC to coordinate UNM efforts.

IV. FUTURE PLANS FY 17

The Office of Government and Community Relations is working to increase our awareness and involvement with the local governments, the greater Albuquerque community, and the neighborhood associations surrounding campus.



FY 2014-2015 Annual Report

Human Resources

Submitted by:

Dorothy Anderson, Vice President

<http://hr.unm.edu>

Mission and Vision

Mission

As a strategic partner, we support the University’s success by:

- Providing guidance, tools, and processes to foster a culture of workforce effectiveness.
- Designing, implementing, and promoting a total rewards program that attracts and retains high quality employees.

Vision

To create an environment where great people thrive and excel.

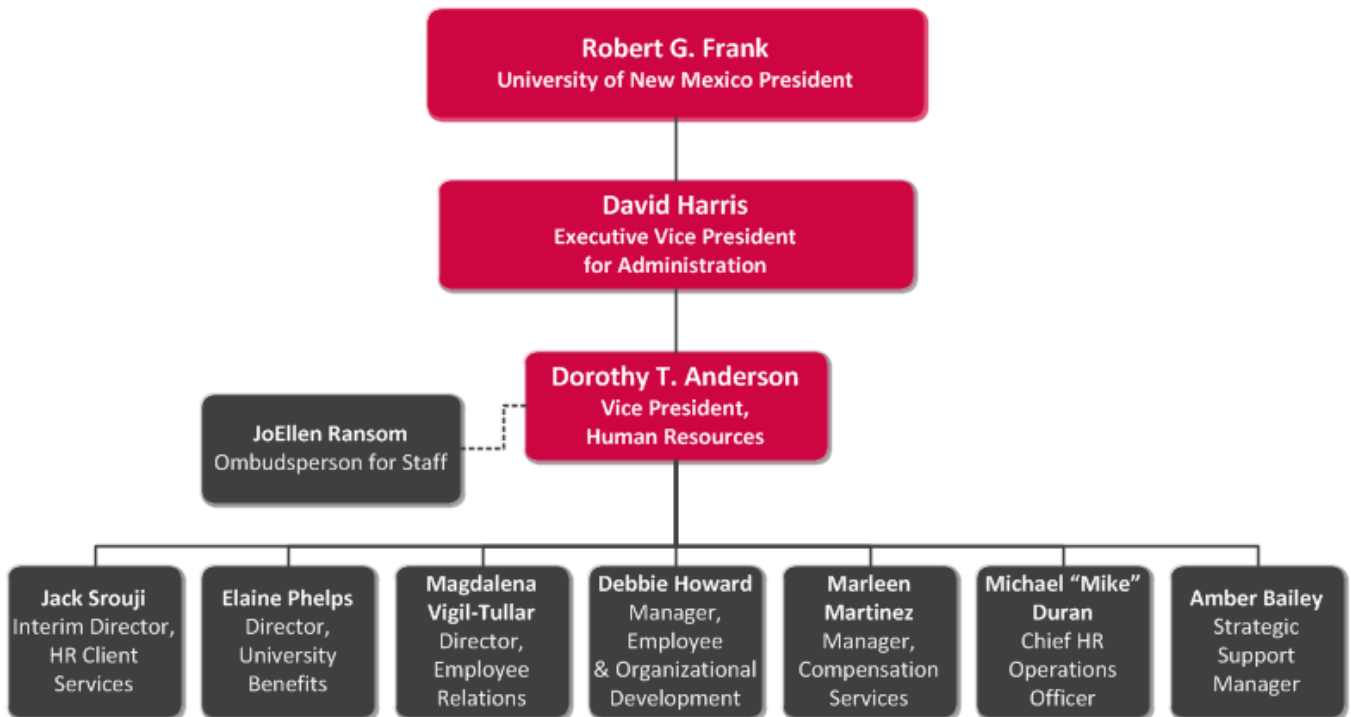
Values

- Excellence
- Integrity
- Diversity
- Freedom
- Sustainability
- Respectful Relationships
- Access with Support to Succeed

Organizational Chart

Vice President for the Division of Human Resources

2014-2015 Organizational Structure



2014-2015 Annual Report**Table of Contents**

I.	Executive Summary	4
II.	Overview	5
III.	Accomplishments/Significant Developments FY14-15	8
IV.	Current Projects	13
V.	Future Plans/Goals FY15-16	17
VI.	Personnel/Staffing Information	18
VII.	Appendices: Human Resources Annual Report Metrics	22
	Appendix A: Training	22
	Appendix B: Educational Benefits	23
	Appendix C: Health Benefits	24
	Appendix D: Compensation	29
	Appendix E: Staff Performance	30
	Appendix F: Demographics	31
	Appendix G: Staff Employment	35

I. EXECUTIVE SUMMARY

The Division of Human Resources (HR) is a business unit at the University of New Mexico (UNM). With over 15,000 employees at UNM working in health care, education, research, and support services, HR serves a diverse workforce, located across the state and beyond, with distinctly different business needs. With a staff of approximately 71 people, HR provides a full range of human resources services, products, tools, and programs within a highly regulated environment.

During Fiscal Year 2014-2015, HR experienced a change in leadership; many projects and tasks have been completed and many new initiatives are underway. Some of the more significant project accomplishments are highlighted here.

The University Benefits Department worked with Aon Hewitt to conduct a dependent verification audit (April 22 - June 16, 2015) in an effort to ensure only eligible dependents are covered by UNM's Medical Plan. At the close of FY15, approximately 96% of the population was verified, resulting in a projected savings of \$635,304 for the first year (\$552,154 after deducting the cost of the project).

HR signed a contract with Cornerstone OnDemand and kicked off the initiation, discovery, and design phases of implementing a new applicant tracking and onboarding system to replace PeopleAdmin, the current UNMJobs process. Although the system is scheduled to go live in the first quarter of 2016, significant progress was made in FY15 that continues into FY16 as this project has the support of several UNM leaders from all hiring areas: Staff, Faculty, and Student.

Another significant accomplishment by HR was the launch of Lobo U, the refreshed half-day New Employee Orientation (NEO). Due to participant and non-participant feedback, best practices, and the desire to help new employees focus on immediate needs, NEO was refreshed and condensed into a half-day session. The first session was held July 6, 2015; we have received positive feedback from employees as well as their departments regarding the change in this program.

In July 2014 a Health Plan Committee (HPC) was created to evaluate UNM's current healthcare benefits and bring forward possible plan changes by December 2014. The HPC presented their recommendations to the Board of Regents on November 14, 2014 and the committee continues to implement the recommendations which are planned through FY17. At the close of FY15, a report was developed describing the history and current state of UNM's Self-Insured Health Plan. It was distributed to UNM leadership and published online.

In an effort to provide more specialized services for our School of Medicine (SOM) and to better serve our staff and retirees, HR filled two positions dedicated to these audiences. A highly skilled healthcare recruiter was retained to seek out the best talent for the SOM and a Projects Specialist was retained to provide more targeted assistance to employees regarding their retirement benefits and financial wellness as well as to serve the UNM retiree population. Both positions are seen as a positive initiative in service of the HR Mission, Vision, Values, and the UNM2020 Vision.

Further, in support of the President's UNM2020 Vision of becoming a great place to work, HR led the charge to develop the first University-wide Staff Engagement Survey, which was administered in November 2014. In response to some of the findings, the Division developed and recommended a reward and recognition compensation incentive program for staff employees. The focus was to develop programs that link compensation to outcomes so that participants and working groups have an important incentive to change behavior, increase productivity, and achieve organizational goals.

Budget Summary

The HR budget is utilized in support of hiring and recruitment of staff, for employee compensation, benefits, and training for the University faculty and staff. In addition, the HR Division budget is utilized to provide strategic guidance, consulting support, and compliance support for the various departments of the University. It strives to provide services and individual support to UNM employees in numerous aspects of their personal life, including health, wellness, and financial information. HR's operating budget for Fiscal Year 2014-2015 totaled \$6.5M. The primary sources of funding for HR are I&G (38%), general institutional services (29%), and internal service center funding (13%). Other sources of funding for HR include Misc. Services, Misc. General, General, and Balance Forwards. The majority of HR's expenditure budget includes salary & benefit costs (\$5.2M).

II. OVERVIEW

Each area within the Division of Human Resources has contributed to this year's success. The following highlights the primary functions and contributions of each department.

HR Administration

HR Administration provides support and guidance for HR while overseeing all aspects of the division. As a member of the Executive Cabinet, the Vice President of HR serves as the University's strategic liaison. The Administration Office assists with executive searches, executive compensation, strategic employment and benefits issues, and labor relations. This office oversees HR processes including outgoing communications, proposals for training, business and wellness initiatives, RFP processes, organization, and classification studies, policy proposals and changes, and division purchases. HR Administration facilitates the Service Awards, an annual recognition event for staff.

University Benefits and Retirement Services

University Benefits and Retirement Services administers benefits for staff, faculty, School of Medicine clinical faculty, resident physicians, affiliate 501(c)(3) organizations, pre-65 and 65+ retirees, and dependents of employees, covering over 12,000 lives. Benefits offered to employees include medical, dental, vision, life, long-term disability, short-term disability, accidental death and dismemberment, flexible spending accounts, long-term care, and education benefits. The University Benefits and Retirement Services leads the Request for Proposal (RFP) process for employee benefits, including evaluation of proposals, selection of carriers, and production of vendor contracts. Each semester, approximately 300 students receive the dependent education scholarship, and approximately 1,200 employees take advantage of the tuition remission program. University Benefits and Retirement Services also ensures that all benefit programs are in compliance with state and federal regulations. Additionally, this department administers the RFP process and ensures regulatory compliance for student health insurance.

University Benefits and Retirement Services provides educational and administrative services for active employees, employees preparing for retirement, and employees who have retired from UNM. This department hosts the Retirement Vendor Fair and provides multiple retirement classes throughout the year for active employees. University Benefits and Retirement Services coordinates onsite visits from UNM retirement vendors, who educate employees and answer their questions about UNM's 403(b) and 457(b) supplemental retirement plans. This department conducts an annual Open Enrollment for 65+ Medicare-eligible retirees.

Client Services (Includes Staff Recruitment and UNM Temps)

HR Client Services is comprised of three (3) major functions: HR Consulting, Recruitment and Temporary Services, and Employment Transaction Services.

The HR Consultants provide guidance and consultation to clients on employee relations, performance management, conflict/problem resolution, compliance with employment laws and regulations, and University Policies. They consult with constituents on strategic workforce planning, employment, recruitment, and compensation including reclassifications, career ladders, and temporary and permanent salary adjustments. The Consultants work closely with Legal Counsel on EEOC and HRD claims, and provide consultation to departments regarding severance and settlements discussions. They develop, design, and train clients with regard to general and specific HR policies, procedures, and best practices.

Recruitment Services and UNM Temps work with departments to address staffing needs. UNM Temps is an internal temporary staffing service which provides services including posting temporary positions, sourcing, screening, endorsing, and onboarding candidates for various temporary and temporary-to-regular assignments throughout UNM. Recruitment Services assists departments with recruitment and hiring of critical, hard-to-fill staff positions (regular, term, and contract). They maintain an internal direct placement recruiting service, which includes posting positions, advertising, sourcing, interviewing, endorsing, coordinating interviews and travel, negotiating offers, and onboarding. They assist departments in creating recruitment plans, to include providing advertising recommendations, reviewing posting language and providing recommended edits, and processing of advertising requests. While maintaining the UNMJobs social media sites, they also represent UNM at various community meetings and events, including career fairs.

The Transaction Center provides technical support to the University community on Banner HR/Payroll. They primarily process employment transactions to include applicant tracking and Banner data entry; conduct post audit reviews on employment transactions; manage New Hire documentation and creation of jobs in the Banner system; provide consultation and training on processing of Electronic Personnel Actions and time entry; process Vital Error reports; provide consultation on Banner Authorization Requests; oversee Position Management in the Banner system; administer the FastInfo Knowledgebase; participate in testing, trouble shooting, and problem resolution in the development and maintenance of specialized HR databases; and enterprise resource planning systems, computer software systems, and manual/electronic filing systems. Finally, they gather and conduct data analysis on various operational and HR items; generates periodic ad hoc summary reports, assist in reconciliation of reports; research and resolve data discrepancies, and provide consultation to the Employment Area Leads (EAL) group.

Compensation

Compensation develops, administers, and ensures quality management of all institutional compensation policies, guidelines, and procedures related to UNM staff employees. This department develops and maintains the institutional staff salary plan, and serves as the principal institutional source of consultative expertise on all staff classification/compensation matters. This department designs and implements strategic, institutional compensation initiatives based on frequent studies of job markets and general compensation trends, internal staffing trends, and researched cost-benefit analyses. This department provides expert consultation on best practices, compliance with University Policy and state and federal compensation laws, and client management in the resolution of complex day-to-day classification/compensation issues and concerns. Compensation designs and conducts University-wide staffing and classification review studies, manages the processes of position classification and position description, and oversees administration of the staff Career Ladder program, including policies, processes, and procedures.

Employee and Organizational Development (EOD)

EOD provides the UNM community with the tools to bridge gaps between potential and performance, enhancing the performance of an organization and the well-being of its members. Tools include online and in-classroom competitive learning, organizational consultation, coaching, and systematic customized activities designed to provide an organization's members with the necessary skills to meet current and future job demands. EOD provides targeted solutions to enhance leadership and skills development. EOD also manages Learning Central, an online training course catalog. The catalog includes over 200 courses for career development, effective communication, performance excellence, and leadership fundamentals. All EOD courses are free to UNM employees. EOD organizes and facilitates Lobo U, UNM's New Employee Orientation (for staff), Management Academy, Passport to Leadership, and the Professional Development series.

Employee Health Promotion (EHP)

Employee Health Promotion (EHP) is a comprehensive health promotion program offered to UNM benefits-eligible employees and their dependents. EHP services are a proactive approach to reducing medical care costs attributed to illness or injury related to unhealthy lifestyles. Health Education Consultants work with department leaders/managers to help support and sustain a healthy culture by customizing programs and offering wellness guidance and recommendations. This department oversees campus-wide initiatives such as Preventive Health Days and the Lifesteps weight management program. Whether through fitness assessments, health education courses, or one-on-one sessions with a health educator or registered dietitian, EHP is committed to wellness at UNM.

Employee and Labor Relations

Employee Relations works as a specialized consultant area for employee and labor relations cases and compliance issues. This department facilitates collective bargaining with UNM's three unions, and works as a liaison between UNM and the unions to preserve an effective working relationship. Employee Relations represents management in labor proceedings and elections. Employee Relations is responsible for drafting a majority of HR-related policies, including benchmarking and regulatory reviews. This department monitors proposed legislation that affects HR processes. Employee Relations handles specialized functions such as unemployment, the exit interview process, and acts as the liaison for the drug testing process and the Department of Transportation processes. Employee Relations also conducts investigations on HR-related matters submitted primarily through the anonymous hotline.

HR Finance & Business Services

HR Finance oversees the financial activity and accounting operations of the Division by planning and developing comprehensive operating budgets (i.e. instruction, general, capital, public service, internal service, and non-endowed spending endeavors), for a wide range of activities. This department manages the day-to-day finances of internal operations and institutionally managed funds of approximately \$98 million dollars.

HR Business Services supports UNM's Enterprise Resource Planning (ERP) systems by initiating and managing projects that implement new applications, upgrading and enhancing current systems, and by improving HR processes through the use of technology. By working closely with our partner administrative offices, Payroll, Budget, and the other employment areas, this department coordinates the development and implementation of tools and systems that increase efficiency and effectiveness in business practices. Effectively communicating new processes and providing support to department users is accomplished through campus-wide informational sessions, focus groups, surveys, and the development of web-based job aids.

HR Information Technology (HRIT)

HRIT develops and maintains the HR/Payroll operational data store, including views, queries, dashboards, and reports - used by appropriate members of the Division and the campus community. This department supports the desktop and hardware needs of approximately 71 employees, and is responsible for providing the Division with the most current tools to carry out daily business. HRIT is also instrumental in the development and maintenance of the HR website. HRIT manages the Banner HR/Payroll (HR/PR) and other related Enterprise Resource Planning (ERP) system upgrades, including user acceptance testing. HRIT performs the process to freeze applicable data used to prepare IPEDS and AAP reporting. HRIT provides technical support for UNM's ERP systems in collaboration with HR Business Services.

III. ACCOMPLISHMENTS/ SIGNIFICANT DEVELOPMENTS FY14-15

Through the daily operations, special projects, and attention to strategic goals, the Division of Human Resources achieved a number of noteworthy accomplishments during the Fiscal Year 2014-2015 in relation to the four Overarching Goals.

1. **Workforce Effectiveness:** Foster a culture to enhance workforce effectiveness by building partnerships, competencies, and expertise.
2. **Total Rewards:** Support and promote a total rewards program that attracts, retains, and develops high quality employees.
3. **Continuous Improvement:** Improve HR processes, systems, use of technology, and infrastructure to provide a high level of efficiency, quality, and cost effectiveness.
4. **Metrics:** Create metrics to monitor institutional trends and HR organizational effectiveness.

Benefits

- **Oversaw the RFP process for selection of a Benefits Consultant:** An RFP was prepared and posted in August – September 2014. Proposals were due September 11 and the RFP committee met in October to finalize scoring the proposals. Aon Hewitt Consulting, Inc. was awarded the business with the contract continuing through December 31, 2015 and includes an option to renew.
- **Ensured Compliance with Affordable Care Act (ACA) Regulations:**
 - Submitted numbers to UNM's Tax Department to pay the first Patient Centered Outcomes Research Institute (PCORI) fee, which was due July 31, 2014.
 - UNM Medical Participant count was provided to IRS to calculate the Transition Reinsurance Fee prior to the November 15, 2014 due date.
 - Plan design changes to out-of-pocket maximums included deductible, coinsurance and copays for medical and prescription drug, effective July 1, 2014, exceeded ACA requirements and better protect employee out-of-pocket costs.
 - UNM's medical plan expanded coverage for clinical trials to comply with a July 1, 2014 ACA requirement.
 - Began preparing for implementation of the Employer Shared Responsibility mandate, requiring employers to provide minimum essential affordable coverage to employees who work, on average, 30 hours per week. Mandatory reporting which includes information returns be mailed

to employees by January 31, 2016 and IRS file transmittal by March 31, 2016.

- **Conducted a Prescription Drug Claim Audit:** Healthcare Analytics, a subsidiary of Gallagher Benefit Services, conducted a prescription drug audit of Express Scripts, UNM's Pharmacy Benefit Manager. The audit began in October 2014 and was completed in December 2014; it did not include any substantial findings. However, the auditor provided suggestions to include in the next pharmacy contract.
- **Conduct a dependent eligibility audit to identify, report, and dis-enroll 100% of identified ineligible dependents:** Aon Hewitt, in coordination with University Benefits, conducted a dependent eligibility audit April 22 – June 16, 2015. Aon identified 257 ineligible dependents on UNM's medical plan. Projected first year savings is \$635,304 (\$552,154 after deducting the cost of the project). We provided the campus with summary information about the audit in a special edition benefits newsletter in August. Aon will continue to audit eligibility of new hires and their dependents throughout FY 2016.
- **Faculty Benefits Advisor:** UNM HR Benefits identified an HR Benefits .5 FTE to act as a benefit resource to meet faculty needs. This individual worked with Faculty Affairs on Main and North Campus to implement the initiative. The advisor meets with many individual faculty, as well as meets with groups of faculty. She reached out to all new faculty who joined UNM for the Fall academic semester, and presented benefits information at New Faculty Orientation, on August 10. She provides assistance, as needed, with HSC New Faculty Orientation throughout the year. Faculty may also reach out to her directly for assistance with benefits questions.
- **UNM Health Plan Committee Recommendations:** UNM HR Benefits department was instrumental in the completion of four recommendations that were approved by the Board of Regents in Spring 2015. They will continue to address and support the remaining recommendations during the next two years:
 - Decrease the number of existing third party administrators (TPA)
 - Defer the .25 VEBA increase effective July 1, 2015
 - Blend the pre-65 retiree with the active employee claims experience, effective July 1, 2015
 - Effective July 1, 2015, UNM will discontinue offering post-retirement medical and dental benefits to new hires
- **Health Plan Identification (HPID) number:** To ensure compliance with HIPAA, we filed for and received UNM's HPID number for the self-funded medical plan and a second HPID number for UNM's self-funded dental plan. After receiving the numbers, CMS delayed enforcement of the requirement for an HPID.

Client Services

- **Implement Banner Document Management System (BDMS):** To facilitate the electronic storage, retrieval, archiving, and purging of employment transaction documentation. The implementation of BDMS will be measured by the completion of deliverables in the project plan,

which will keep this very large, institutional project moving forward.

- **EPAF Email Notification - Phase 2:** In a collaborative effort with Payroll, HR Client Services created an email notification system to help departments manage their internal EPAF process. The new system helps Payroll in managing the high volume of monthly adjustments.
- **HSC Financial Services Incentive Plan:** In an effort to manage turnover and the cost associated with it, HR Client Services developed an incentive plan for HSC Financial Services. The plan will allow the department to offer a one-time, non-recurring, financial incentive to employees for achieving pre-determined goals.
- **School of Medicine HealthCare Recruiter:** In May 2015, HR Client Services hired a recruiter to focus on hiring of Physicians and Mid-Levels to address the shortage on HealthCare providers at the School of Medicine. As of October 1, 2015, this initiative helped screen four (4) Physicians and two (2) Oncology Nurses.

Compensation

- **Finance Classification Review:** Completed and implemented a comprehensive classification review of UNM Finance related job classifications used throughout the University. The study consisted of conducting a formal market rate analysis, modifying the classification descriptions which now identify differences in expectations of those jobs specific to central departments and to enhance the overall recruitment, hiring, and retention of talent with a structure that complements current business needs.
- **Salary Structure Adjustment:** Based on the results of a periodic review conducted by Compensation and in efforts to remain competitive as an employer acknowledging the efforts of its employees, the UNM Staff Employee Salary Structure was adjusted upward by approximately 6%, effective November 1, 2014. Any employees falling below the minimum of the new range have been identified and will be adjusted accordingly.
- **Staff Reward and Recognition Plan:** Developed and socialized a reward and recognition compensation incentive program for staff employees; the plan proposal included various payout options including one-time payout and increases to base salary. The recommendation was in support of the UNM2020 Vision and in alignment of the UNM compensation philosophy. The focus was a standardized approach that would link compensation to outcomes such that participants and working groups would have an important incentive to change behavior, increase productivity, and achieve organizational goals. This program was completed and presented to Senior Leadership; however, it was put on hold indefinitely due to the current economic state.
- **Identify and Evaluate Compensation Disparities:** A review was conducted which evaluated staff compensation and identified areas where possible compensation adjustments may be appropriate to adequately pay employees based on specific criteria. This initiative was designed to identify existing market placement and compression concerns. The objective was to assess the data and address areas with the biggest issues accordingly. Positions falling under a bargaining agreement were excluded

from the analysis unless bargained and agreed upon by respective unions.

- **IPEDs and Pay Equity Codes:** Conducted a mass review and reconciliation of all IPEDs and pay equity codes captured in over 1,200 classifications which were then entered in Banner. This initiative was in efforts to maintain the data integrity of the information captured on various compliance reports. Through this process, we identified an opportunity to automate the tracking of the data which would allow for easier reporting of the codes.

Employee and Organizational Development

- **NEO Half-Day (Lobo U):** NEO was refreshed and condensed into a half-day session from a full day. Format changes were made based on NEO participant and non-participant feedback and examining best practices. Lobo U focuses on sharing information immediately needed for new employees to be productive in their work area.
- **UNM Staff Engagement Survey:** Administered first UNM Staff Engagement Survey across all campuses. 46% of staff participated in the survey. Completed Campus level survey analysis and published Staff Engagement Survey Executive summary. Results posted to newly developed Office of the President's Engagement webpage.
- **Online Presence:** Built 15 online modules to support UNM systems implementations or upgrades including Phase II of LoboTime, Results Oriented Management (ROM), HR Medical Plan Audit, IT IDEA Faculty Evaluation tools, and HSC Office of Research Conflict of Interest.
- **UNM Community:** EOD invited to be a board member of the Organization, Information, & Learning Sciences (OILS) Academic Program Advisory Board to assist in reevaluating and reshaping both the OILS Bachelor's and Master's academic programs.

Employee and Labor Relations

- **Enhanced UNM's commitment to Affirmative Action presence:** Led project team to ensure:
 - The capture of new handicap and veteran categories at applicant stage, post offer/pre-employment stage, and annually
 - Updated Affirmative Action statements were placed in UNMJobs and advertising materials
 - President's Affirmative Action Statement was communicated to staff by working with the UNM Office of Equal Opportunity
 - Stakeholders were included on plan to capture affirmative action requirements in training
- **Federal Minimum \$10.10/Hour Mandate:** Tracked legislation requiring increases to wage rate to a minimum of \$10.10 per hour for those individuals working under Federal Contracts. Communicated with other Employment Areas, Purchasing, Contracts and Grants, and Human Resources Information Technologies regarding the requirements and coordinated the team to communicate and implement the changes.

- **Executive Order (EO) 13672-LGBT Non-Discrimination and EO 11246-Equal Employment Opportunity:** Tracked and disseminated information to stakeholders to ensure requirements of the Act relating to communication of Affirmative Action were implemented through Human Resources recruitment efforts (updated taglines) and through contractual language to subcontracts (Purchasing & Contracts and Grants).
- **Contract Negotiation for United Staff-UNM, Local 6155:** Negotiation to impasse on Article 12, Section A (no increase), Section K (clarification on Reclassification and Adjustments), and Section Q (final wage payouts). Agreement was reached after end of fiscal year.
- **Contract Negotiation for Police Officer's Association (POA):** Agreement on Section 15-Compensation (no increase, minimum wage rate for all non-probationary Main Campus Officers, and shift differential increase to 50 cents for shift 2 and 55 cents for shift 3), Section 3-Uniforms (yearly distribution), Section 38-Promotions (process), Section 33-Internal Affairs (Incorporation of MOU on timeline), Section 37-Automatic Termination (non-return from leaves), Section 47-Term of Agreement (full contract for three years with partial annual re-opener).
- **Contract Negotiation for Communication Workers of America (CWA):** Agreement on Article 7, Wages and Allowances (no increase); Article 9, Work Schedules (removal of staff from differential); and Appendix B (salary grade change for Accounting Clerks from 5-7). A few additional issues regarding Bus Drivers summer hours, reinstatement of Labor Management Committee, and electronic payment for political actions deductions.
- **Contract Negotiation for Committee of Interns and Residents (CIR):** Served as a subject matter expert providing assistance to Management Team for the Committee of Interns and Residents on full contract negotiations that led to final agreement.

HR Information Technology

- **Convert Human Resources Reports to New Reporting Tool:** With the end of UNM's Hyperion and Oracle reporting tools, HRIT converted all of Human Resource's 250+ Hyperion and Oracle reports to the APEX Reporting Tool now known as HR Reports.
- **Transition Human Resources Employee Files Storage to an Electronic Process:** Implement Banner Document Management System (BDMS) to facilitate the electronic storage, retrieval, archiving, and purging of employment transaction documentation.
- **Research and Propose a Talent Management System:** The Cornerstone OnDemand (CSOD) Talent Management System was identified as the replacement system for UNM's current PeopleAdmin Applicant Tracking System. The new CSOD system includes applicant tracking, onboarding, and performance modules.
- **Upgrade Operational Data Store (ODS) to Version 8.4.1:** Upgrade of the ODS was required to ensure compatibility with the Banner ERP System.
- **Upgrade of Banner HR/PR ERP System to include Versions 8.9, 8.10, and 8.11:** Upgrade of Banner HR/PR ERP system was required to remain compatible with the base Banner System and to remain in compliance with Ellucian support.

- **Conversion of Catastrophic Leave Process to Utilization of the Banner Self-Service Portal:** In order to realize efficiencies, the CAT Leave enrollment process was transitioned away from the Opinio survey process to the Banner Self-Service Portal. This transition provides more consistency in the delivery of employee benefits.

IV. CURRENT PROJECTS

Benefits

- **UNM Health Plan Committee:** In 2015, the HR Benefits began implementation of the UNM Health Plan Committee's and Board of Regents' recommendations; four recommendations were completed. They continue to focus on the remaining initiatives:
 - Increase employee/dependent engagement in disease management and wellness programs through targeted programs and communication;
 - Continue collaborative efforts with UNM School of Pharmacy to identify opportunities where the College of Pharmacy can partner with Express Scripts to reduce Rx costs with enhanced service, while preserving choice;
 - Expand collective purchasing opportunities among UNM, UNMMG, SRMC, and UNMH;
 - Develop plan design structures with additional incentives to increase LoboCare utilization across all TPAs; and
 - Evaluate implementation of a High Deductible Health Plan (HDHP) and Health Savings Account (HSA) for active employees as an option in addition to other plans.
- **Benefits Index Study:** HR Benefits is working with Aon Hewitt to create a Benefits Index Study, which will measure the value of UNM's benefits compared to other institutions of higher education, as well as large, local employers. A study will be prepared for faculty, and a second study will be prepared for staff. The faculty study will use institutions of higher education as comparators. The staff study will include institutions of higher education and local employers as comparators.
- **Benefits Strategic Plan:** HR Benefits is developing a 3-5 year strategic plan, in conjunction with Aon Hewitt. Initially Aon representatives conducted Stakeholder interviews. They then created guiding principles and a vision. A gap analysis between current state and vision, and creation of goals and objectives will then be developed. After refining the goals and objectives, we will begin drafting potential initiatives. We will then finalize guiding principles, vision, goals, and objectives.
- **Campus-Wide Wellness Committee:** To consolidate and increase the reach of wellness promotion initiatives and programming campus-wide, Employee Health Promotion is leading the efforts to form a committee to promote a Unified Wellness Committee for the University.
- **Tobacco Cessation Committee:** The Campus Office of Substance Abuse and Prevention (COSAP) received a grant to make UNM a tobacco-free campus. HR Employee Health Promotion is participating in the revision of Policy 2250: Tobacco-Free Campus and activities related to implementing this cultural change.
- **Premium Holiday:** The Premium Holiday was a directive from Administration to allow employees enrolled in a UNM Health Plan to avoid paying their premiums for the month of December. HR

Benefits is taking the lead to create a work plan for the Premium Holiday initiative, including testing the system and developing communications.

- **NMERB Stakeholders Review of Return to Work Rule:** HR Benefits is a member of the Stakeholder group that is working with members of the Educational Retirement Board to evaluate the return-to-work exception rule, as well as the statute, to increase solvency of the fund and reduce the administrative burden for the ERB. The Board plans to formally endorse the legislation before the 2016 Legislative Session with changes being effective July 1, 2017.
- **Evaluate Tuition Remission for Adjunct Faculty:** HR Benefits, in conjunction with the Provost's Office, is evaluating the financial impact, plan changes, and regulatory impact, of offering tuition remission to Adjunct Faculty at Branch Campuses and at Main Campus.
- **Retirement Plans Investment Committee:** HR Benefits is in the process of establishing a committee to provide oversight for UNM's supplemental retirement plans (403b and 457b). The committee will oversee 403(b) investment strategies and options, service providers, plan fees, and compliance with plan documents. Duties will include diversification of plan assets and meeting with vendors to review investment portfolios, plan expenses, and fund performance.

Client Services

- **Complete BDM State Certification:** Once the state approves our BDM plan, we are able to destroy hard copy documents. This process will make our files more secure and provide us flexibility with space issues.
- **Direct Placement:** Hiring good employees is not only important to the University, it's essential to help us maintain a competitive edge. Therefore, Client Services is striving to develop a Direct Placement Model that would centralize the hiring process and allow professional recruiters to search, screen, and recommend finalists to the hiring officials. This hybrid Direct Placement Model will ensure recruiters are not making the final hiring decision yet they will still be involved in screening for the best candidates. Hiring the wrong person has a significant impact on an organization, both financially and mentally. The cost to replace an employee is estimated to be 50% of the person's salary and the impact in moral can be catastrophic.
- **Safety and Risk Services (SRS) Incentive Plan:** HR Client Services is partnering with SRS to create a performance incentive plan to help enhance employee engagement and control turnover.

Compensation

- **Compensation Study:** UNM HR procured an external compensation consulting service to provide advice in the redesign, implementation, and communication of a comprehensive compensation system for staff employees. The focus is to identify best practices for compensation guidelines in higher education/health sciences environments and to improve flexibility and consistency in the application of compensation actions. The final product should include enhancements such as

identifying an approach for recognizing hot skills and unique market pressures, salary placement in the salary structure of the appropriate grade based on specific criteria, etc.

- **Staff Recognition and Incentive Program:** HR is working to develop and socialize a recognition and incentive program for staff employees in support of the UNM2020 Vision and in alignment with the UNM Compensation Philosophy. The plan will be comprised of various program options, to include both monetary and no/low cost recognition options. Additionally, a webpage will be designed to house all program information to include program designs, forms, policy reference, recognition opportunities, and other resources and existing UNM Campus Awards. The focus is to develop programs that link outcomes to recognition and rewards such that participants and working groups have an important incentive to change behavior, increase productivity, and achieve organizational goals.
- **IT Classification Review:** A comprehensive classification review of UNM IT staff-related job classifications is nearing completion. This review consisted of a formal market rate analysis, formation of broad position classification descriptions, and establishment of the foundation for future compensation practices that will support the staffing need of IT-related jobs with regard to recruitment, hiring, and retention of talent. The scope of this initiative consisted of reviewing 80 position classifications with over 450 employees in the reviewed classifications. A majority of the classification grades will be adjusted upward to better align with current market rates. In addition, this review will allow the reduction of the IT job classifications from 80 to 33 with minimal financial impact.
- **Total Compensation Calculator:** To help illustrate the comprehensive total rewards package that UNM provides to their employees, Compensation is developing a total compensation calculator which includes a full range of benefits that contribute to an employee's overall compensation such as medical benefits, retirement, tuition remission, supplemental life insurance, and other related programs. The calculator will provide a personalized estimate of an employee's total compensation package and the overall value of his/her employment at UNM.
- **Various classification reviews:** As an on-going initiative, comprehensive reviews of various job families are conducted to evaluate organizational structure, to review and update classification descriptions, to identify potential career development paths, and to assess existing staffing levels. Current reviews underway are Legal Professionals, Residency Coordinators, and the Data Management series.
- **Mass Classification Updates:** As part of the on-going maintenance of the existing 1200+ staff classification descriptions, evaluations and mass updates are currently underway. These efforts help to further align our compliance obligations with everchanging laws, ensure integrity of various sets of information being reported, and support our overall desire to align classifications descriptions with current business needs of the University. Current projects include:
 - Evaluate and update of the EEO-6 categories, including SOC/OCC codes (in support of OIA and OEO initiative).
 - Identify classification descriptions requiring Campus Security Authority (CSA) language in the content (in support of the Clery Act).
 - Identify and document the naming convention methodology to be maintained on a go-forward basis. This effort will set the foundation for consistency when developing new classification descriptions (in support of reporting efforts and ease of searching classification descriptions).

- Evaluate and update the physical effort statements in our classification descriptions to be compliant of VEVRAA and Section 503 directives.

Employee and Organizational Development

- **UNM Staff Engagement Survey:** HR led the effort to implement strategies in support of the UNM Staff Engagement survey finding. Initial survey analysis completed. UNM, Main, HSC. and Level 3 survey data distributed to respective organizations. Completed Staff Engagement Survey Executive Summary report. Met with UNM Senior Leadership team to review findings and make recommendations for next steps. Convened work group to develop single university goal in support of survey findings. Met with the President's Office to review potential University engagement survey related goals. Finalizing implementation plan to coincide with CY16 goal setting.
- **Leadership Programs Redesign:** Re-evaluate Management Academy and Passport to Leadership programs as their content began to overlap. Establish ULead, a short, topic focused cohort format leadership program to better align with best practices and our clients' needs. ULead cohorts will be offered 2-3 times a year. EOD is also implementing ongoing management course offerings, have completed instructor certifications to support new leadership courses and are integrating additional resources into programs: Lynda.com, Continuing Education, and Anderson Professional development offerings. EOD finalized the first Leadership Cohort framework and topic areas.
- **Performance Review Redesign:** Benchmarked current Staff Performance Review process for a more effective performance focused approach. Developed the Pilot Performance Review process which eliminates complicated rating scales and employee self-assessments. Solicited pilot groups to test the new PEP form. Over 1,600 people participating in the pilot. Communications, webpage, and guidelines developed to support the pilot. Worked with HRIT to ensure Banner forms can accommodate new pilot rating. Develop process for pilot groups to provide feedback on new process.
- **Student Employee Training Process:** Develop and standardize student employee training process for UNM student employees.
- **Minors on Campus (new policy):** Address code of conduct relative to minors on campus. Policy outlines requirements, procedures, and training needed when minors are in the workplace or classroom.
- **LoboRESPECT (Sexual Harassment Training):** Working with IT and Lawroom/Campus Clarity, an online compliance training vendor, to finalize requirements to house student employee, faculty, and staff training.

Employee and Labor Relations

- **Fair Pay and Safe Workplaces Act:** Employee Relations has reviewed the proposed regulation, analyzed the potential impact, and provided comments to professional organizations for Federal consideration. The next step is to track legislation and implement changes when legislation is enacted.

- **Fair Labor Standards Act:** Employee Relations has reviewed proposed regulation which primarily focuses on increasing the earnings threshold to over \$50,000 for classification of non-exempt (hourly) employees. Effort included analyzing potential impact, and providing comments to professional organizations for Federal consideration. The next step is to track legislation, and in coordination with other units within the Division, to communicate and implement changes when legislation is enacted.

HR Information Technology

- **Talent Management System (TMS):**
 - The University is replacing the UNMJobs application with an improved application called the Talent Management System (TMS). This project will accomplish three primary objectives by focusing on talent management and people management to increase efficiency, empower and maximize the productivity of their employees, and align with institutional UNM2020 Vision goals of becoming a destination university for personal and career achievement (Goal 2).
 - Phase 1 of the project will utilize the Cornerstone Applicant Tracking software to provide a robust, modern, comprehensive application tracking process to complement our ERP Banner system for HR/Payroll. The project will automate the onboarding process through landing pages, automated workflows, and offer letters that can be locally configured and customized for different employee types.
 - Classification Description (JD) Build: Implementation of TMS requires the design of the new JD system build. This includes identifying required fields, how various forms in Banner are populated with those fields, and the functionality of those fields. This initiative establishes the foundation of all staff position classifications for the University, identifies key attributes and requirements of the positions, and plays a critical role in the successful set up of the new Applicant Tracking System by CSOD.
 - Phase 2 (FY17) of the project will focus on performance management. It will provide supervisors with an automated approach to measure talent and help employees achieve their goals.

V. FUTURE PLANS/ GOALS FY15 –16

For Fiscal Year 2015-2016, the Division of Human Resources will focus resources on completing projects and tasks that align with the four goals below.

1. **Workforce Effectiveness:** Foster a culture to enhance workforce effectiveness by building partnerships, competencies, and expertise.
 - Implement University-wide Wellness Committee initiatives.
 - Continue redesign and rollout of leadership programs to meet the needs of growing UNM leaders.
 - Improve LoboRESPECT required training and method for tracking completion.
 - With Student Affairs, develop and standardize student employee training process.
 - In accordance with UNM Staff Engagement Survey, strive to meet the university goal that will be established for HR.

- Organizational Review by Sibson Consulting: Conduct HR structural assessment, review department strategy to enhance effectiveness, and determine action plan to implement change.
2. **Total Rewards:** Support and promote a total rewards program that attracts, retains, and develops high quality employees.
 - Complete Benefit Index Study measuring the value of UNM's benefits compared to peers
 - Benefits Strategic Plan: Develop 3-5 year benefits strategic plan to help direct future decisions related to benefit offerings.
 - Implement revised Compensation Guidelines for staff employees for improved flexibility with regard to compensation actions.
 - IT Classifications Review: Conduct full assessment and benchmarking of classifications and implement changes.
 - Pharmaceutical benefits: Identify where College of Pharmacy can partner with Express Scripts to identify cost saving opportunities for UNM.
 - Form a Retirement Plans Investment Committee to provide oversight of the supplemental retirement plans.
 - Develop and make available staff recognition and incentive resources.
 - Expand Wellness Program to include Financial Wellness through the HR Projects Specialist role.
 3. **Continuous Improvement:** Improve HR processes, systems, use of technology, and infrastructure to provide a high level of efficiency, quality, and cost effectiveness.
 - Implement Talent Management Suite's Applicant Tracking and Onboarding modules.
 - Complete implementation of Banner Document Management Scanning (personnel files).
 - Pilot new Performance Evaluation form and begin planning for University-wide implementation in CY17.
 - Job Description updates: EEO-6 update, addition of Clery Statement where applicable, and determine and assign naming convention.
 - Disciplinary Process: Conduct a thorough review of current and other processes, and develop matrices, guidelines, and revised templates to improve and streamline process overall.
 4. **Metrics:** Create metrics to monitor institutional trends and HR organizational effectiveness.
 - Affirmative Action Plan Reporting: Work with vendor to produce faculty and staff reports.
 - Institute Hiring Review Process: (Along with UNM leadership) review and assess vacant positions campus-wide.
 - Continue to assess the UNM Staff Engagement survey results and associated goal-setting by committee.
 - In piloting the new evaluation form, assess overall performance ratings and compare against previous ratings.

VI. PERSONNEL/STAFFING INFORMATION

For all that the Division of Human Resources accomplished during the Fiscal Year 2014-2015, we thank our dedicated and hardworking staff who were with us during this period. We appreciate their diligence, work ethic, intelligence, creative ability to solve difficult problems, and willingness to work long hours to improve service to our customers. The following are individuals who were employed at one point during FY15.

Regular Staff

Aguilar, Alma L.
 Alvarado-Nau, Regina M.
 Anderson, Dorothy T.
 Armijo, Robin R.
 Bailey, Amber M.
 Barela, Sofia G.
 Baskerville, Jessica M.
 Brantley, Jane M.
 Brito, Marie A.
 Brown, Melissa A.
 Brown, Michael E.
 Brown, Michele J.
 Brown, Sandra D.
 Brummett, Meghann M.
 Byrd McDaniel, La'Trenia
 Casale, Rose Ann
 Chavez, Cynthia Perez
 Cox, Coleen A.
 Davis, Lori L.
 De La Pena, Brenda K.
 Dominguez, Gloria A.
 DuBrock, Sandra L.
 Duff, Kelly M.
 Duran, Michael S.
 Dussault, Amanda V.
 Evans, Joseph W.
 Farias, Mary E.
 Friend, Holly D.
 Gallegos, Alisha E.
 Gallegos, Diego T.
 Gamboa, Lisa R.
 Garcia, Debra A.
 Garcia, Elizabeth C.
 Giese, Sarah L.
 Goble, Cameron M.
 Goering, Judith A.
 Gonzales, Emanuel J.
 Gonzales, Jillian J.
 Gonzales, Steven M.
 Green, Melissa A.
 Gutierrez, Rita D.
 Hall, Dianne L.
 Heaton, Tricia L.
 Heimbigner, Nancy
 Hernandez, Aida
 Howard, Debbie A.
 Jackson, Stacie L.

Karnes, Jessica L.
 Lafleur, Dawn M.
 Layton, Cynthia S.
 Logan, Melanie R.
 Lopez, Alex J.
 Lopez, Patrick J.
 Lucero, Brianne A.
 Maez, Carmen L.
 Martinez, Ashley M.
 Martinez, Marleen L.
 Martinez, Patricia I.
 Mendez Guardado, Candy
 Miller, Bethany E.
 Natera, Teresa
 Pacheco, Gabriel S.
 Payne, Samantha J.
 Phelps, Elaine
 Reyes, Sandra L.
 Rickman, Jamie E.
 Rippberger, Ann M.
 Rivera, Denise L.
 Rivera, Gabriel A.
 Rivera, John D.
 Rodriguez, Herman J.
 Romero, Frank I.
 Rotunno, Stefanie L.
 Roybal, Vanessa M.
 Salazar, Caroline M.
 Sandlin, Elizabeth M.
 Sandoval, Logan P.
 Shrum, James R.
 Simmons, Kristin L.
 Simons, Anelisa
 Srouji, Jack
 Thornton, Debra G.
 Tompkins, Shary
 Trujillo, Carmen V.
 Ulloa, Martin
 Vawter, Reed A.
 Velasquez, Sandra
 Vigil-Tullar, Magdalena S.
 Washington, Jewel M.
 Wilson, Anna B.

Temp & On Call

Grier, Stacia A.
 Medina, Naomi J.
 Meeker, Sarah R.

Rodriguez, Angela A.
 Silva, Nicole Y.
 Von Bergen, Tana R.

Student Employees

Bostick, Ashley D.
 Carreathers, Christopher
 Cook, Felipe P.
 Crooks, Robert
 Garcia, Sidonia A.
 Garvin, Connor J.
 Gomez, Jonathon A.
 Kasireddy, Dinesh K.
 Lebsack, Matthew R.
 McCormick, Daniel A.
 Sanchez, Denisha A.

Staff Appointments

Name	Job Title	Date
Aguilar, Alma L.	Human Resources Consultant	7/14/2014
Anderson, Dorothy T.	Vice President, Human Resources	9/12/2014
Bailey, Amber M.	Strategic Support Manager	5/15/2015
Casale, Rose Ann	HR Tech, Sr.	5/4/2015
Davis, Lori L.	Office Assistant	2/16/2015
Duff, Kelly M.	Human Resources Consultant	12/4/2014
Farias, Mary E.	Sr. Employee & Org Devt Conslt	6/1/2015
Gonzales, Emanuel J.	Staff Recruitment Splst, Sr.	10/13/2014
Gonzales, Jillian J.	Employee & Org Devt Consltnt	10/6/2014
Gonzales, Steven M.	Analyst/Programmer 2	4/22/2015
Hall, Dianne L.	Analyst/Programmer 2	11/3/2014
Lopez, Patrick	Analyst Programmer 3	6/15/2015
Martinez, Ashley M.	Human Resources Consultant	2/2/2015
Miller, Bethany E.	Staff Recruitment Specialist	7/28/2014
Payne, Samantha J.	Admin Assistant 2	9/8/2014
Rippberger, Ann M.	Professional Recruiter	5/18/2015
Rodriguez, Herman J.	Data Manager	3/2/2015
Salazar, Caroline M.	HR Tech, Sr.	1/12/2015
Shrum, James R.	Human Resources Consultant	8/18/2014
Simmons, Kristin L.	Staff Recruitment Specialist	2/16/2015
Trujillo, Carmen V.	Human Resources Consultant	3/9/2015

Staff Separations

Name	Job Title	Date
Aguilar, Alma L.	Human Resources Consultant	12/12/2014
Alvarado-Nau, Regina M.	HR Tech, Sr.	8/25/2014
Brown, Melissa A.	Staff Recruitment Specialist	7/24/2014
Brown, Michael E.	HR Consulting Grp Mgr	8/22/2014
Byrd McDaniel, LaTrenia D.	Strategic Support Manager	3/26/2015
DuBrock, Sandra L.	Mgr, HR Client Services	1/5/2015
Duff, Kelly M.	Human Resources Consultant	1/3/2015
Friend, Holly D.	Analyst/Programmer 3	4/17/2015
Gallegos, Diego T.	Professional Support Intern	12/19/2014
Gonzales, Emanuel J.	Staff Recruitment Splst, Sr.	1/9/2015
Green, Melissa A.	Administrative Coordinator	9/5/2014
Hall, Dianne L.	Analyst/Programmer 2	3/13/2015
Heaton, Tricia L.	Sr. Employee & Org Devt Conslt	3/6/2015
Karnes, Jessica L.	Staff Recruitment Specialist	7/18/2014
Lafleur, Dawn M.	HR Projects Specialist	4/20/2015
Martinez, Patricia I.	Supv, Employment	3/2/2015
Washington, Jewel M.	Int Vice President Human Resources	2/2/2015

Job Changes

Name	From	To
Chavez, Cynthia Perez	Coord, Education Support	Training Support Analyst
Gamboa, Lisa R.	Human Resources Devt Consultant	Human Resources Consultant
Garcia, Debra A.	Coord, Education Support	HR Transactions Ctr. Rep, Sr.
Gonzales, Jillian J.	Employee & Org Devt Conslnt	Sr Employee & Org Devt Conslt
Jackson, Stacie L.	HR Administrator 1	Human Resources Consultant
Layton, Cynthia S.	HR Administrator 2	Human Resources Consultant
Logan, Melanie R.	HR Transactions Ctr Rep	HR Services Rep
Martinez, Patricia I.	HR Tech	HR Tech, Sr.
Rotunno, Stefanie L.	HR Administrator 2	Compliance Specialist
Roybal, Vanessa M.	Coord, Education Support	Health Educator
Sandoval, Logan P.	User Support Analyst 2	User Support Analyst 3
Srouji, Jack	HR Consulting Grp Mgr	Int Dir, HR Client Svcs

VII. APPENDICES: Human Resources Annual Report Metrics

APPENDIX A: TRAINING

EOD Training	11-12	12-13	13-14	14-15
Total Number of Workshop Sessions	183	198**	176***	175***
Total Number of Participants*	2,151	1,966	1,747	1,831
*Leadership development courses are now reported separately **Professional Development Series implemented ***Professional Development Series included				

Leadership Development	11-12	12-13		14-15
		12-13	13-14	
Total Number of Workshop Sessions	91	72*	66**	83
Total Number of Participants*	1,034	949	1,038	1,469
^First year to report leadership courses as a separate category *Reduced number of scheduled offerings and transferred to online courses **Management Academy sessions and participants included				

LoboTime Training	11-12	12-13	13-14	14-15
Total Number of Workshop Sessions	Not Available	70	10*	10
Total Number of Participants	Not Available	581	122	101
*Online LoboTime courses included in the Online Training section				

Banner Training	11-12	12-13	13-14	14-15
Total Number of Workshop Sessions	66	93*	120	78
Total Number of Participants*	417	663*	662	573
*New Courses – LoboAchieve and Academic Coaching				

UNMJobs Training	11-12	12-13	13-14	14-15
Total Number of Workshop Sessions	32	21*	19	21
Total Number of Participants*	254	203	199	223
*Classes are not offered as often as the year prior				

Online Training	11-12	12-13	13-14	14-15
Total Number of Workshop Sessions	35	46*	63	30^
Total Number of Participants ¹	19,763	23,250	24,756	15,543
Total Number of exams offered	17	19	16	11
Total Number of participants who completed and passed exams**	10,313	8,696	9,268	4,600
^1University required training on Ethics, Sexual Harassment, Basic Annual Safety, and Accurate Time Reporting included in this number *LoboTime, Budget, LoboTrax, TES – online and job aids **Competencies include Banner Fundamentals and Navigation Exam, Securing Private Data Exam, Travel Exam, P-Card Program Exam, Finance: 30 Most Frequently Asked Questions Exam, Budget Planner Proficiency Exam, Journal Voucher Processing Exam, and Preventing Sexual Harassment Required Training; total number based on “Passed” status ^Number decreased due to deleting inactive online modules				

EOD Facilitations	11-12	12-13	13-14	14-15
Total Number of Facilitations Conducted	119	117	91	82

University Required Training¹	11-12	12-13	13-14	CY 2014
Basic Annual Safety Training	72.1%	61.5%	74.1%	98.9%
Preventing Sexual Harassment	70.2%	71.5%	74.7%	98.9%
Ethics: Framework for Ethical Decision Making**	68.0%	72.1%	74.7%	N/A

¹Percentage of faculty and staff who completed the required training

*Statistics based on total number of Attended or Completed statuses

**Ethics only required for new employees

APPENDIX B: EDUCATIONAL BENEFITS

Tuition Remission Statistics

Department	Academic Year 11-12	Academic Year 12-13	Academic Year 13-14	Academic Year 14-15
Anderson School of Management	\$76,165.00	\$140,111.50	\$202,547.06	\$219,769.04
Continuing Education	\$743,016.18	\$773,529.03	\$577,421.52	\$762,947.74
Continuing Med Education	\$105,185.00	\$172,246.52	\$116,088.00	\$161,427.25
Gallup	\$58,256.65	\$63,033.44		
Los Alamos	\$10,257.15	\$19,285.75		
Miscellaneous*	\$105,568.20	\$44,593.24	\$89,717.25	\$75,839.05
New Mexico State University	\$53,852.72	\$33,844.20	\$88,417.48	\$95,629.40
Recreational Services WOW Prgm	N/A	\$46,675.00	\$34,944.00	\$1,331.00
ROTC	\$0.00	\$16,236.33		
Taos	\$48,126.56	\$51,850.49		
CNM	\$5,863.00	\$0.00	\$0.00	\$0.00
University of New Mexico**	\$2,445,400.54	\$2,567,058.10	\$3,277,947.83	\$3,244,431.34
University of New Mexico Hospital	\$3,738.34	\$4,002.93	\$7,006.00	\$12,306.80
Valencia	\$77,300.07	\$68,825.40		
Total	\$3,732,729.41	\$4,001,291.93	\$4,436,004.64	\$4,573,681.62

*Miscellaneous includes School of Medicine, Health Science Ethics, Center for Development and Disability, NM Geriatric Program, , Office of Medical Investigators, Teacher Education Development, Emergency Medical Services Academy and UNM Center for Life

**University of New Mexico includes, Gallup, Los Alamos, ROTC, Taos, Valencia and Retirees

Dependent Education Scholarship

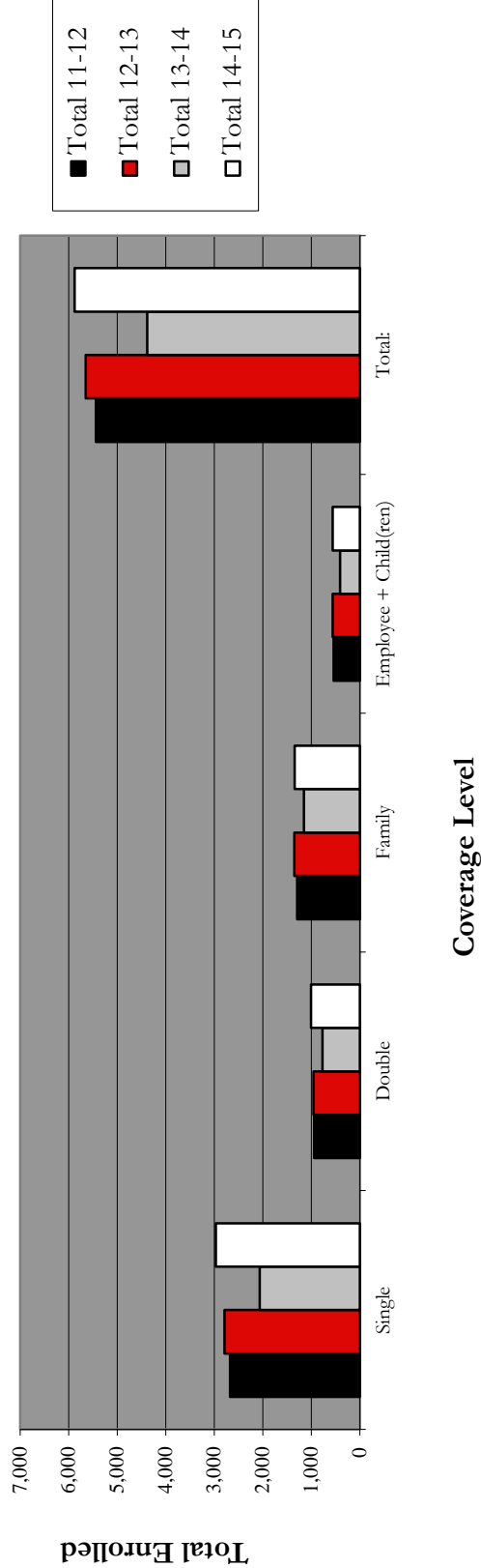
	Academic Year 11-12	Academic Year 12-13	Academic Year 13-14	Academic Year 14-15
Total	\$874,356.31	\$808,671.42	\$883,830.78	\$1,019,506.90

APPENDIX C: HEALTH BENEFITS

Employee Health Plan Enrollees – Active Employees

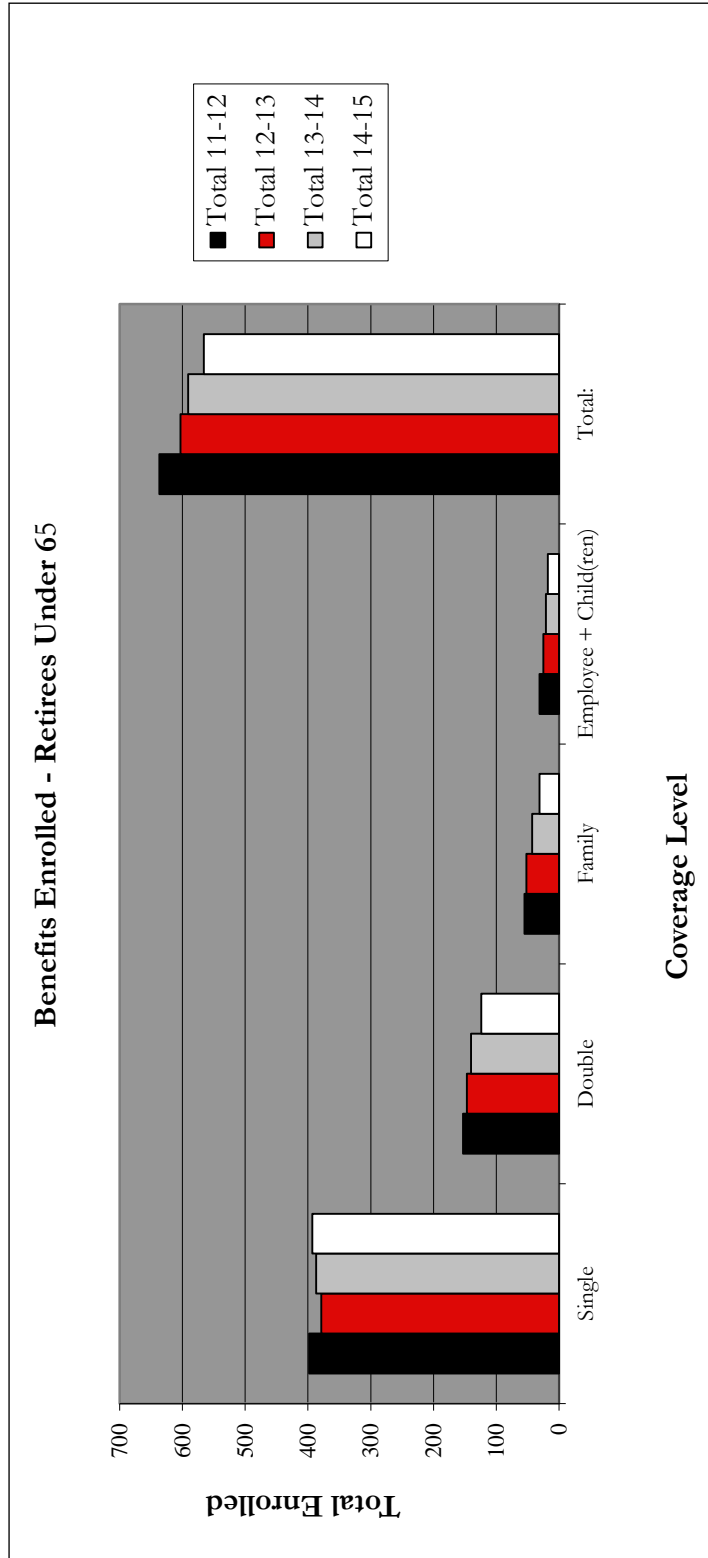
	11-12			12-13			13-14			14-15			
	Lovelace	Pres.	Total 11-12	Lovelace	Pres.	Total 12-13	Lovelace	Pres.	Total 13-14	BCBS	Pres.	UNM Health	Total 14-15
Single	1,749	924	2,673	1,827	962	2,789	1,159	900	2,059	1,888	634	446	2,968
Double	563	376	939	564	387	951	382	384	766	576	275	155	1,006
Family	787	503	1,290	823	526	1,349	678	475	1,153	831	314	200	1,345
Employee + Child(ren)	345	193	538	356	205	561	232	172	404	352	125	83	560
Total:	3,444	1,996	5,440	3,570	2,080	5,650	2,451	1,931	4,382	3,647	1,348	884	5,879

Employee Health Plan Enrollment - Active Employees



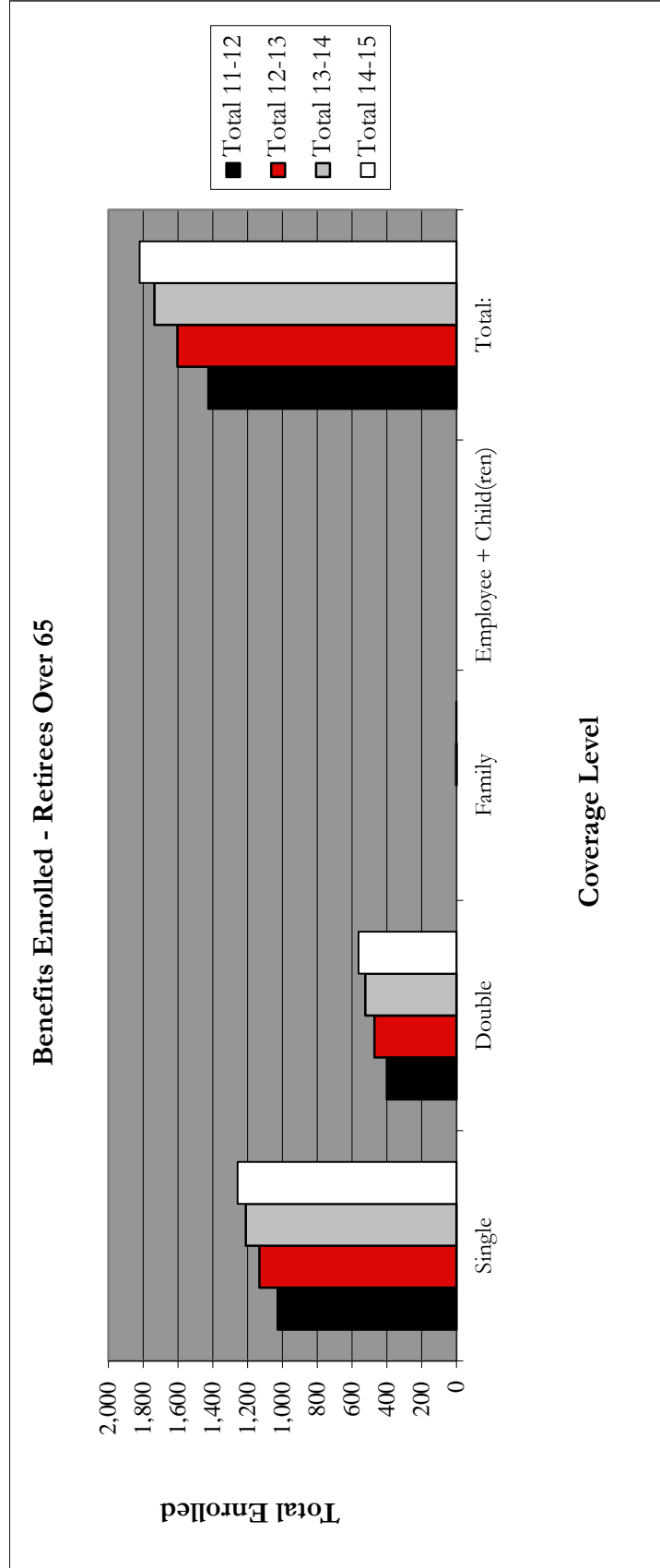
Benefits Enrolled – Retirees Under 65

	11-12			12-13			13-14			14-15			
	Lovelace	Pres.	Total 11-12	Lovelace	Pres.	Total 12-13	Lovelace	Pres.	Total 13-14	BCBS	Pres.	UNM Health	Total 14-15
Single	241	157	398	234	145	379	225	162	387	207	123	63	393
Double	90	63	153	84	63	147	89	51	140	77	34	13	124
Family	29	26	55	29	23	52	25	18	43	15	12	4	31
Employee + Child(ren)	20	11	31	15	10	25	12	9	21	11	5	2	18
Total:	380	257	637	362	241	603	351	240	591	310	174	82	566



Benefits Enrolled – Retirees Over 65

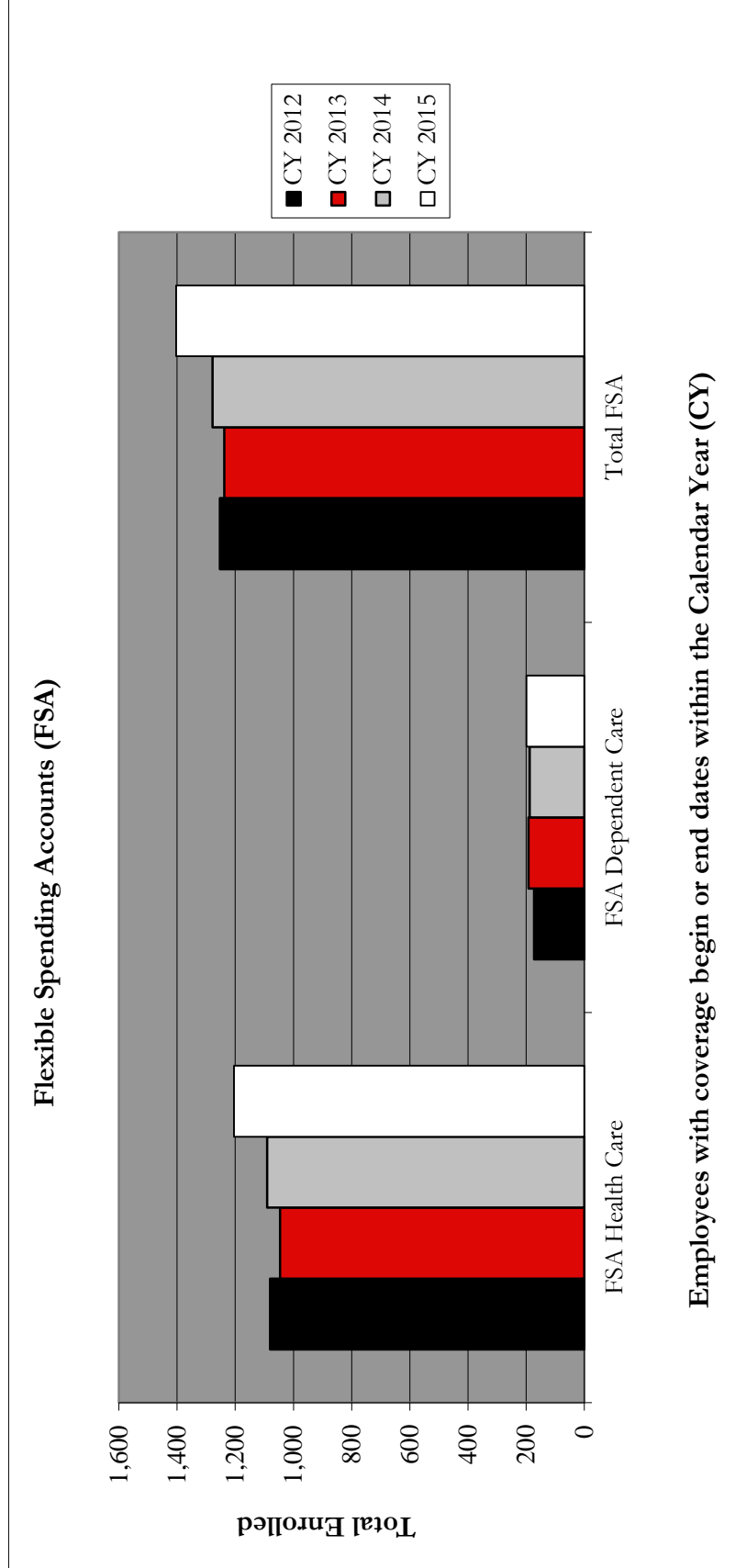
	11-12				12-13				13-14				14-15			
	Lovelace	Pres.	AARP	Total 11-12	Lovelace	Pres.	AARP	Total 12-13	Lovelace	Pres.	AARP	Total 13-14	Lovelace	Pres.	AARP	Total 13-14
Single	526	295	295	1,116	496	378	258	1,132	522	403	286	1,211	513	435	309	1,257
Double	201	121	117	439	202	140	129	471	219	156	149	524	221	182	160	563
Family Employee + Child(ren)	0	0	0	0	0	0	0	0	1	0	0	1	1	0	0	1
Total:	727	416	412	1,555	698	518	387	1,603	742	559	435	1,736	735	617	469	1,821



Flexible Spending Accounts (FSA)*

FSA Type	CY 2012	CY 2013	CY 2014	CY 2015
FSA Health Care	1,080	1,046	1,090	1,204
FSA Dependent Care	173	192	188	199
Total FSA	1,253	1,238	1,278	1,403

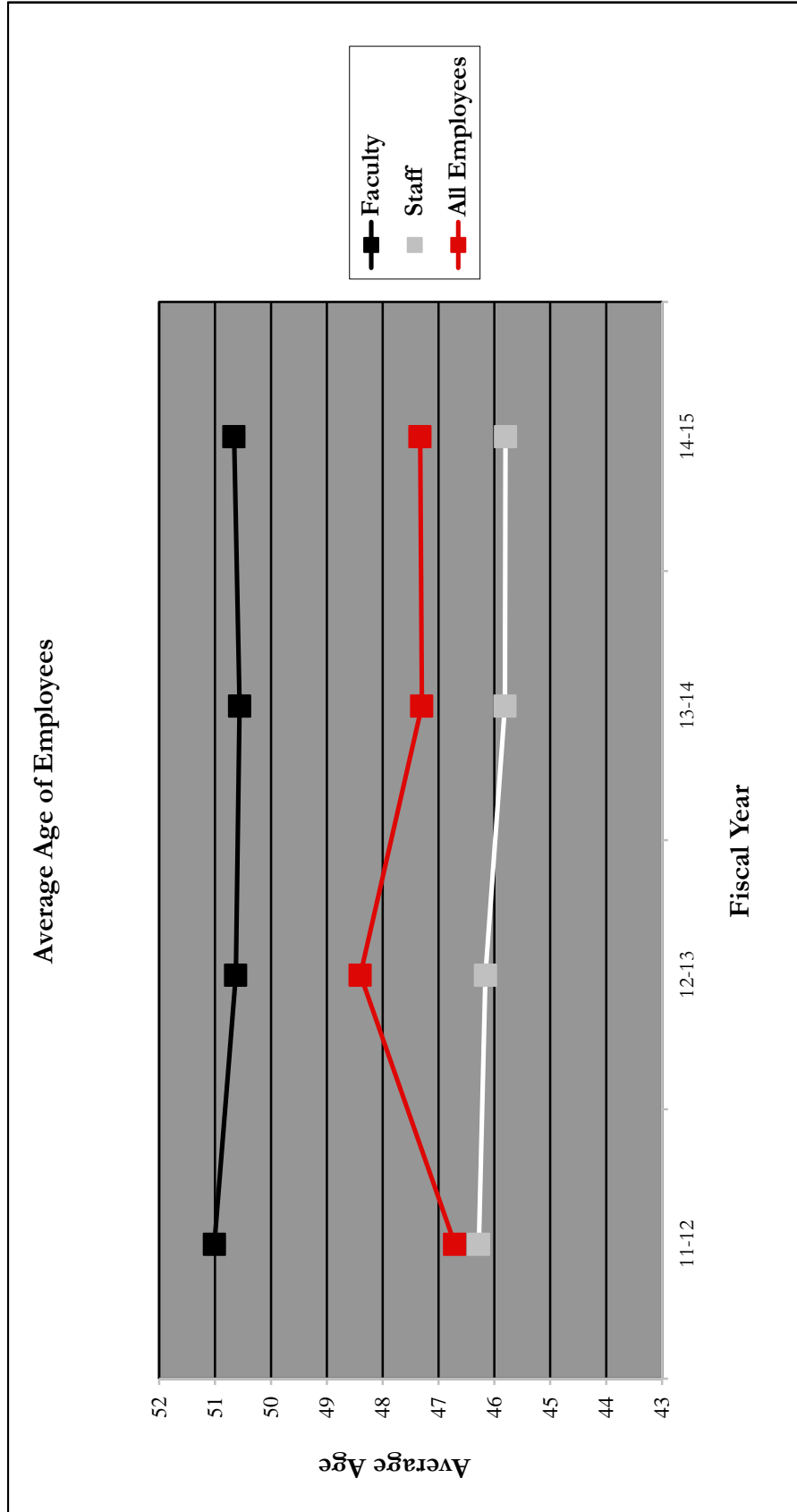
*Flexible Spending Accounts (FSA) allow employees to set aside part of their paycheck on a pre-tax basis, which reduces federal, state, and social security taxes, to reimburse themselves for qualified expenses. These reimbursements are not taxable. Two flexible spending accounts are available, Health or dependent care, and employees can enroll in both. Employees with coverage begin or end dates within the calendar year are counted.



Employees with coverage begin or end dates within the Calendar Year (CY)

Benefits - Average Age of Employees (faculty and regular staff)

Employee Type	11-12		12-13		13-14		14-15	
	Total	Avg. Age	Total	Avg. Age	Total	Avg. Age	Total	Avg. Age
Faculty	2,125	51.01	2,271	50.63	2,359	50.56	2,391	50.66
Staff	5,011	46.28	5,099	46.16	5,157	45.81	5,214	45.80
All Employees	7,136	46.71	7,370	48.40	7,516	47.3	7,605	47.33

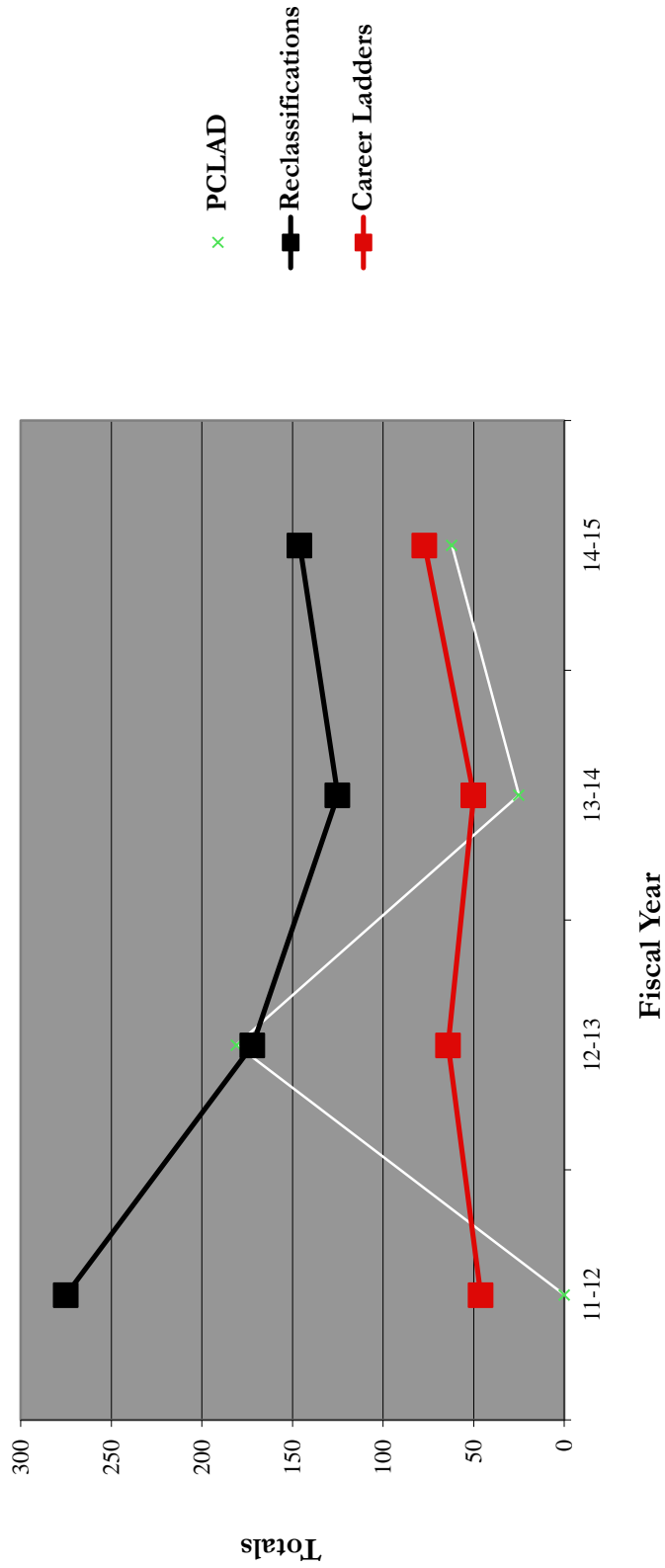


APPENDIX D: COMPENSATION

Reclassifications and Career Ladders

	11-12	12-13	13-14	14-15
Market-Based PClass Adjustments (PCLAD)	N/A	181	25	62
Reclassifications (RECLS)	275	172	125	146
Career Ladders (PROMN)	46	64	50	77

Reclassifications and Career Ladders



APPENDIX E: STAFF PERFORMANCE

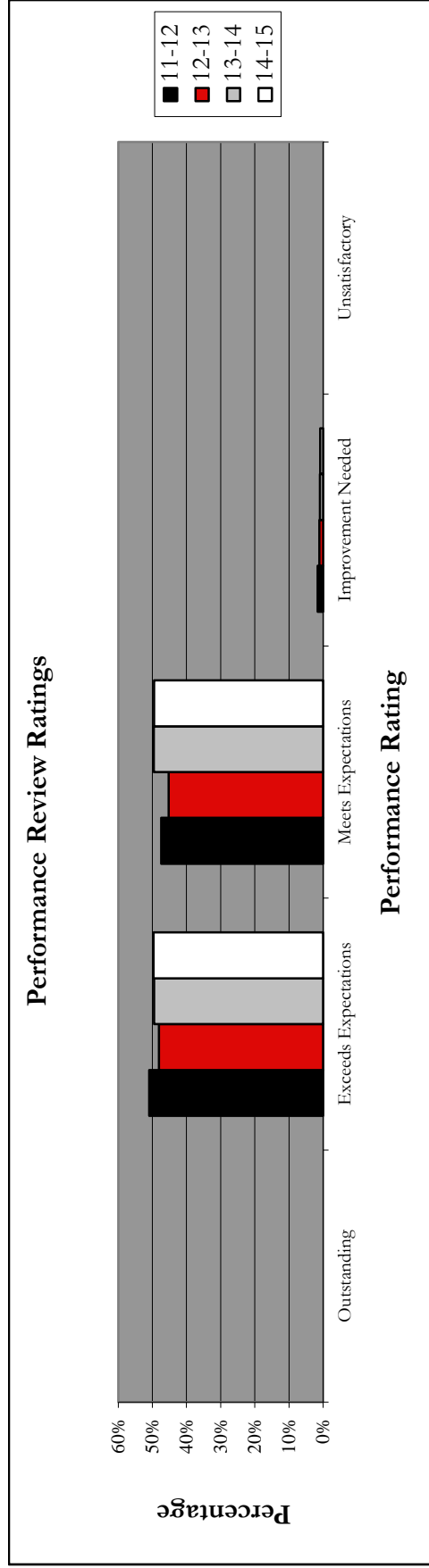
Performance Evaluations

Evaluation Information	11-12	12-13	13-14	14-15
Evaluations Due	4,729	4,695	4,550	4,649
Evaluations Received	4,342	4,431	4,309	4,214
% Evaluations Received	91.8%	94.4%	94.7%	90.6%

Performance Ratings

Rating	11-12*	12-13	13-14	14-15
Outstanding	N/A	N/A	N/A	N/A
Exceeds Expectations	2,212	2,257	2,133	2,096
Meets Expectations	2,059	2,124	2,136	2,084
Improvement Needed	71	50	40	34
Unsatisfactory	N/A	N/A	N/A	N/A
Totals	4,342	4,431	4,309	4,214

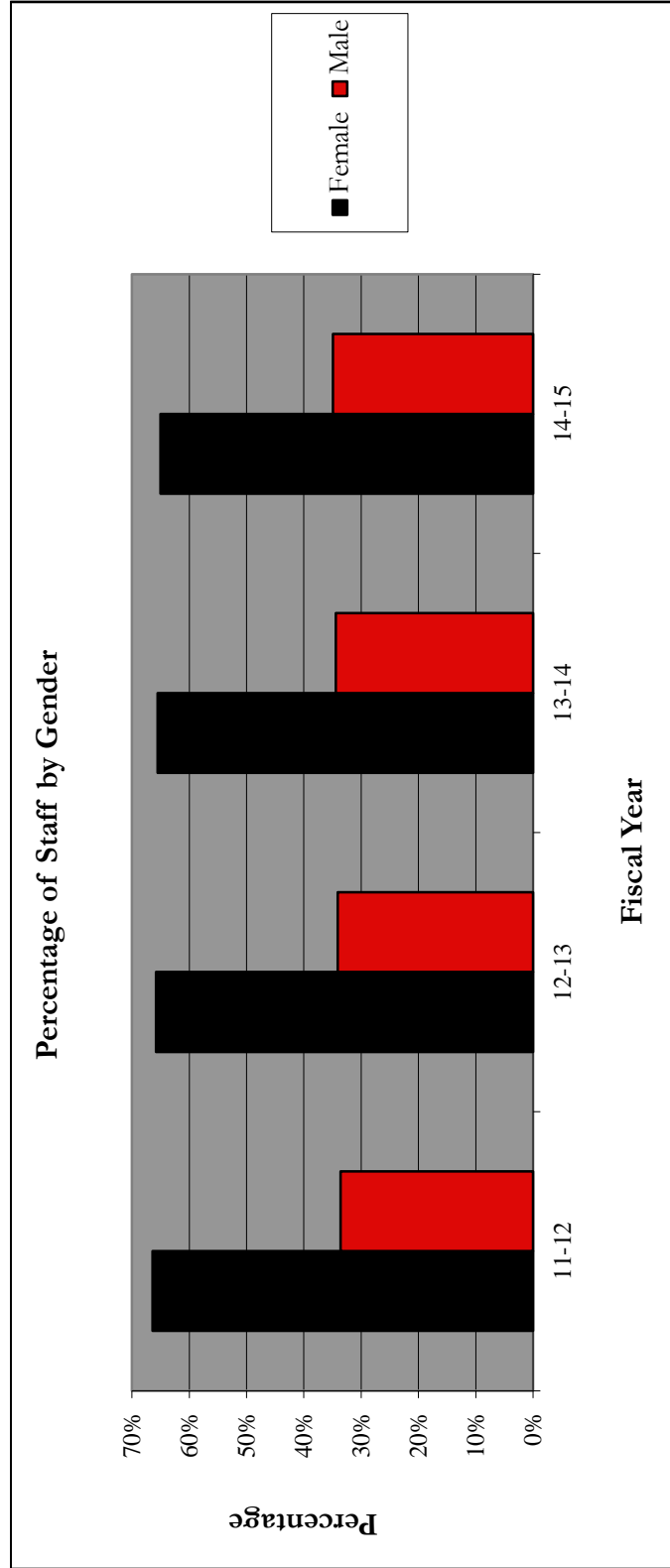
*Performance review ratings were changed in fiscal year 2011-2012



APPENDIX F: DEMOGRAPHICS

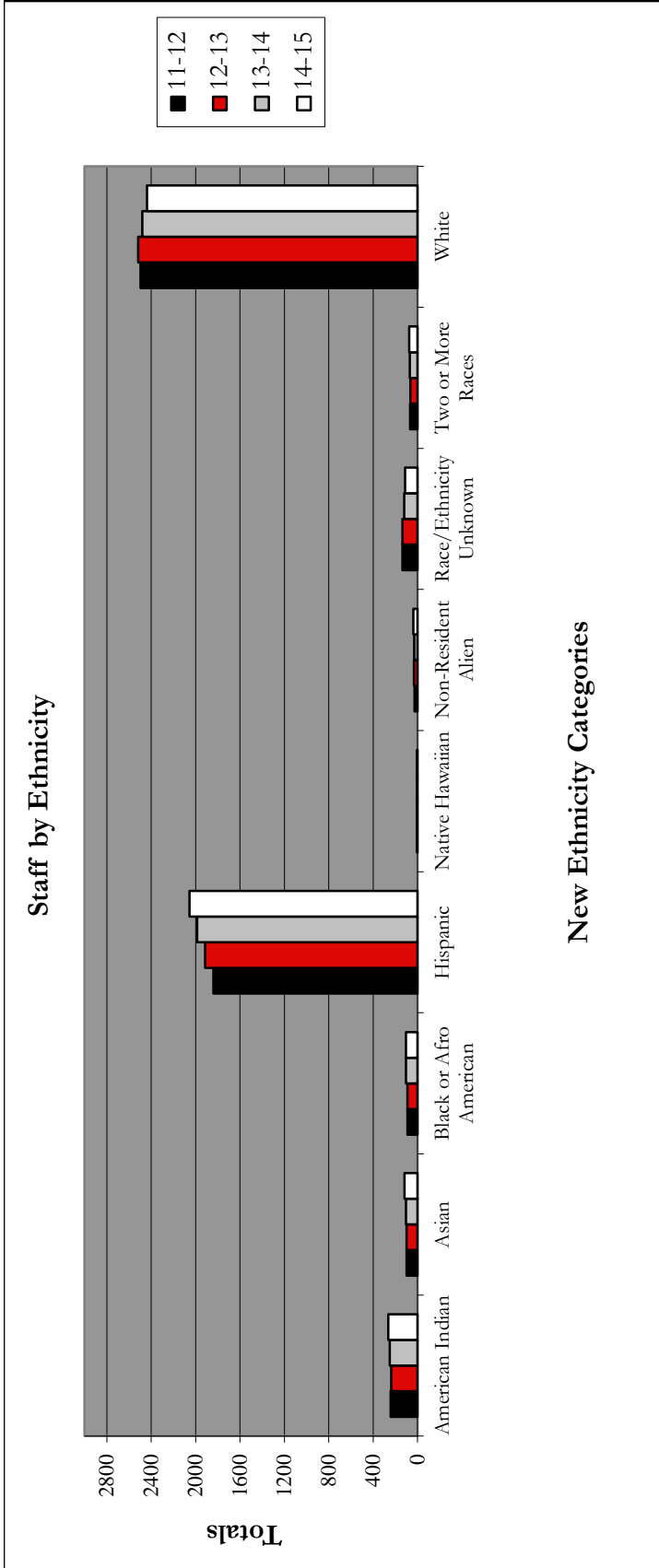
Total Staff by Gender

Gender	11-12	12-13	13-14	14-15
Female	3,326	3,356	3,380	3,392
Male	1,685	1,743	1,777	1,822
Total	5,011	5,099	5,157	5,214



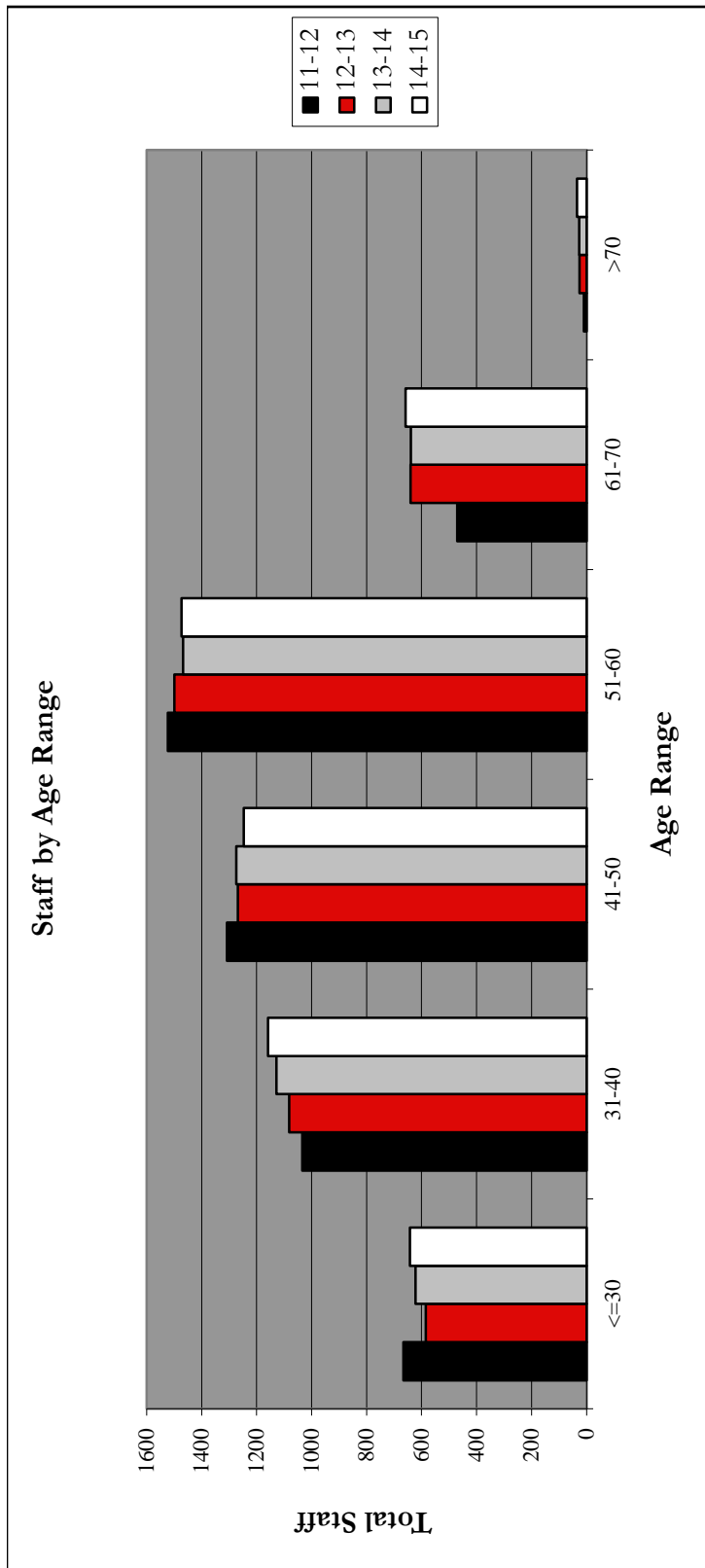
Total Staff by Ethnicity

Ethnicity	11-12	12-13	13-14	14-15
American Indian	244	239	251	265
Asian	100	100	104	119
Black or Afro American	92	92	106	105
Hispanic	1,841	1,913	1,986	2,054
Native Hawaiian	3	4	7	5
Non-Resident Alien	29	33	31	39
Race/Ethnicity Unknown	138	138	122	114
Two or More Races	67	64	69	76
White	2,497	2,516	2,481	2,437
Total	5,011	5,099	5,157	5,214



Total Staff by Age Range

	11-12	12-13	13-14	14-15
<=30	666	585	622	642
31-40	1,034	1,081	1,128	1,159
41-50	1,308	1,268	1,274	1,247
51-60	1,523	1,499	1,467	1,473
61-70	470	640	639	658
>70	10	26	27	35
Total	5,011	5,099	5,157	5,214



APPENDIX G: STAFF EMPLOYMENT**Turnover**

Type	11-12		12-13		13-14		14-15	
	Total	Percentage of Total Staff	Total	Percentage of Total Staff	Total	Percentage of Total Staff	Total	Percentage of Total Staff
Voluntary								
Resigned	511	10.2%	434	8.5%	481	61.1%	1,029	63.1%
Retired	149	3.0%	150	2.9%	164	20.8%	323	19.8%
Involuntary								
Released*	58	1.2%	63	1.2%	42	5.3%	90	5.5%
Relieved**	52	1.0%	52	1.0%	51	6.5%	117	7.2%
Layoff	31	0.6%	17	0.3%	26	3.3%	41	2.5%
Discharged	13	0.3%	16	0.3%	16	2.0%	20	1.2%
Deceased	11	0.2%	4	0.1%	7	0.9%	12	0.7%
Total:	825		736		787		1632	

*Released employees are employees whose assignment ends, typically for a term appointment

**Relieved employees are employees who are let go during the probationary period

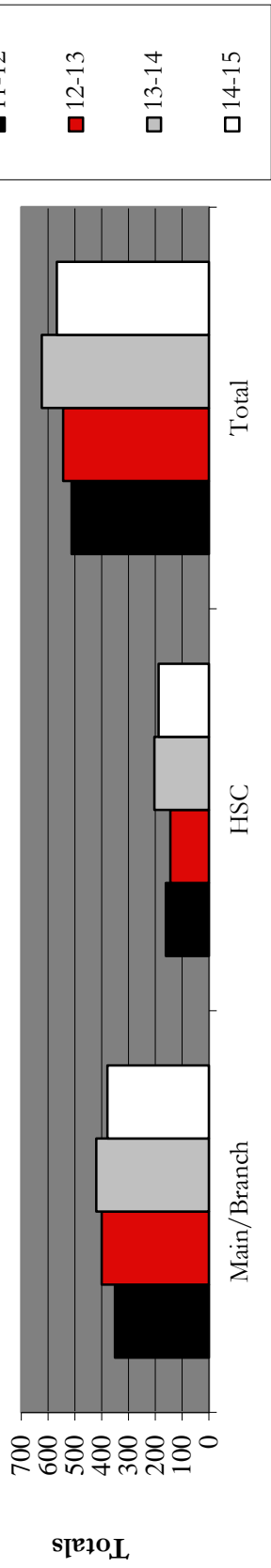
Total Staff Hires

	11-12	12-13	13-14	14-15
Regular Hires				
Competitive Hires	1,243	1,189	1,207	1,318
Alternative Appointment Hires	160	95	111	96
Total Regular Hires	1,403	1,284	1,318	1,414
On-Call Hires	405	443	335	393
Short Term & Professional Service Appointment Hires	67	71	56	48
Total All Hires	1,875	1,798	1,709	1,855

UNMTemps Placements

Location	11-12	12-13	13-14	14-15
Main/Branch	351	400	420	378
HSC	161	144	203	188
Total	512	544	623	567

UNMTemps Placements





FY 2014-2015 Annual Report

Information Technologies

Submitted by:

Gil Gonzales, Ph.D., Chief Information Officer

<http://it.unm.edu>

<http://cio.unm.edu>

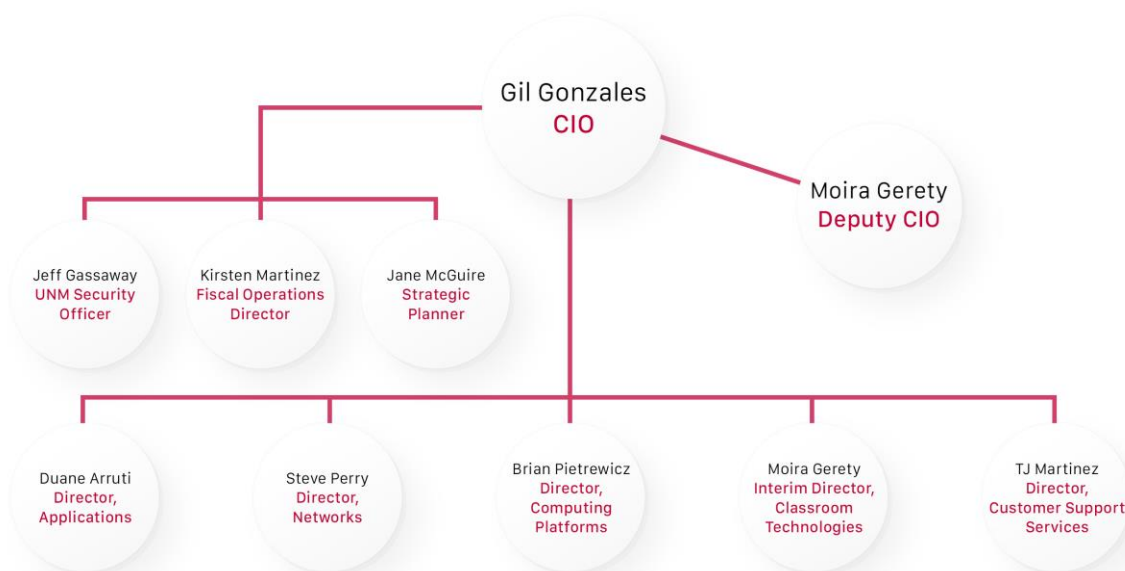
Mission and Vision

Information Technologies provides quality and professional service to the UNM community, especially fast response, and timely solutions to customer needs and questions.

Principles guiding this service consolidation include:

- Providing access, support, privacy, and security to all of the University’s IT customers.
- Improving the effectiveness of IT services and sharing IT resources across UNM.
- Supporting UNM’s mission, goals, and values.
- Coordinating IT planning and communication for better use of resources.
- Ensuring the development and sustainability of high IT standards for UNM.

Organizational Chart



2014-2015 Annual Report**Table of Contents**

I.	Executive Summary	4
II.	IT Services Overview	6
III.	Accomplishments in FY 2014-2015	12
IV.	Plans for FY15-16	15
V.	Personnel Information	16
VI.	Appendices	18
	Appendix A: IT Dashboard for FY2016	19



I. EXECUTIVE SUMMARY

In FY15, IT expanded its support of University activities through a wide array of collaborative initiatives with campus, regional, and statewide entities. Whether working with faculty to obtain NSF funding to pilot a research network, sharing space with the library and bookstore to serve students with new Lobo BrainBars, developing an innovative, real-time academic forecasting app to assist administrative ROM efforts, drafting a datacenter standard with campus-wide input, or submitting grant applications in conjunction with several higher education entities in New Mexico, IT continuously looked at innovative solutions to meet the ever-expanding needs of a dynamic, diverse University constituency. We reached beyond historically established boundaries to initiate projects within the confines of a fiscally challenging environment.

To facilitate student educational experience, we upgraded lab computers and completed a major upgrade of wireless coverage in the SUB with allocated student fees. While an accomplishment, the SUB wireless upgrade also served to illuminate how inconsistent wireless coverage is on campus. Our annual surveys of faculty and students consistently reveal we could better connect the campus. In the spring, users experienced unprecedented issues with wireless authentication that revealed a gap in campus community communication regarding emergent problems. We are working harder to better stress the importance of utilizing the service desk and the Help.UNM ticketing system. The quick accrual of concurrent tickets allows us to pinpoint immediate problems that have significant impact, but we need the assistance of our customers. As device usage only continues to grow exponentially on an annual basis, we are faced with the reality that seamless wireless coverage requires significant investment for UNM to stay competitive. We hope to approach our wireless coverage challenges through the convergence of continued support by senior leadership, dedicated funding, and expert design.

In FY15, we rolled out LoboGuardian in conjunction with UNMPD and the President's Office to improve safety and security on campus. We also care about virtual security and therefore initiated the PCI project to better protect sensitive credit card data and involved our campus community to begin drafting a datacenter standard as a first step in protecting all campus data. We made a major shift in our ticketing system, overhauling the user interface and laying a foundation for better data to measure our performance at a granular level. We also retooled our Work Station Management deployment to better support departments and offices across campus and increased the number of on-campus clients we serve.

Despite a high level of productivity for our organization, a continual challenge remains striking a balance between the need to provide seamless, ongoing operational support for an infrastructure that drives daily operations at UNM with necessary, innovative new projects that keep UNM competitive but also demand FTE and funding. Our goal remains to continuously create a more valuable, reliable resource that serves, connects, and innovates in support of our diverse customers.

In conjunction with UNM leadership, we brought in Kurt, Salmon & Associates to conduct a campus-wide review of the state of information technologies, and recommend future directions for Information Technology in support of the UNM community. We look forward to actively facilitating necessary change.

IT's operating budget for Fiscal Year 2014-2015 totaled \$28.3M. The primary sources of funding for IT include sales and service revenue (45%), I&G (35%), and student fees (7%). Other sources of funding for IT include banner tax, grant funding, and one-time annual allocations of equipment/building renewal and replacement dollars. The majority of IT's expenditure budget includes personnel costs (\$14.8M), annual software licensing fees (\$3.6M), hardware maintenance, and cost of goods sold (\$6.3M) associated with resale of IT services and equipment. Licensing obligations continue to increase each year as well as the need for technology refresh. To address these fiscal challenges, IT is reevaluating its funding model and continues to look for operating and capital funding sources to fund maintenance and renewal costs and new infrastructure.

On behalf of the entire staff of Information Technologies, thank you for taking the time to learn about what we accomplished in FY15. I encourage you to share your questions or comments with the IT team and me as we continue to build an outstanding, valuable IT environment for our University.

II. IT SERVICES OVERVIEW

Services delivered by IT span many technologies and provide the essential underpinning for UNM's academic, administrative, and research activities through networking, phones, enterprise administrative and collaborative applications, computing facilities for students and faculty in classrooms and labs, institution-wide contracts and enterprise licensing of software, as well as high-touch services such as surveys, test scoring, and reporting.

FY 2015 Service Stats at a Glance

- **Web hits** (www & dept.unm) continue to increase: 10% in a year to 4M hits per day, an increase due to increased web-delivered services and information.
- **UNM Email:** 421M messages after spam filtering, with 37,882 active Lobomail users.
- **UNM NetIDs** at almost 84,000 active accounts.
- 943 IT-consistently **managed, student-facing computers** in IT Pods, computer, and general classrooms.
- **Storage** at 1,172 terabytes managed by IT for applications, hosted machines, and shared files.
- **Virtualization and server consolidation** continues to decrease power consumption.
- **Scan** and test scoring continue to decrease in favor of online services.
- Weekday average **concurrent wireless users** increased 60% this year (358% in 5 yrs) to 22,891.
- **ERP transaction volumes:** Average monthly production database reads: 7+ billion, an 80% increase in activity from last year.
- Monthly average reporting data store (ODSP) reads: 5.2 billion.
- **Telephone:** Services are up slightly– 20,179 landlines, 9,246 with voicemail, and 2,103 University cellphones.

Service Desk

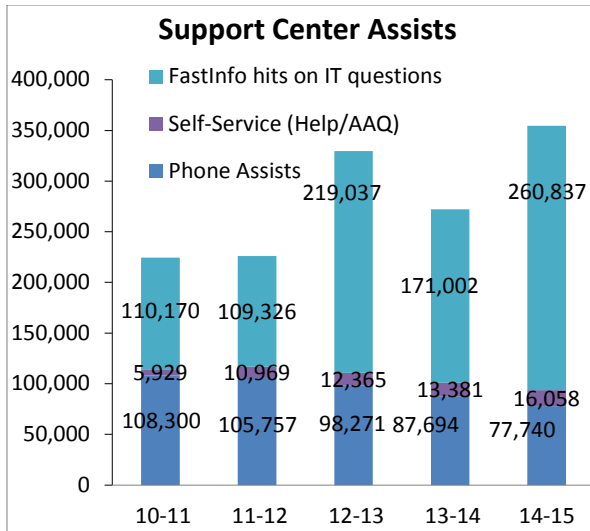
The IT Service Desk provides a single point of contact for our services. The Desk is comprised of a self-service knowledgebase where information can be accessed, and Agents respond to queries, incidents, or service requests.

IT demonstrates increased efficiencies when users can find answers to technical problems online or can request service from IT without having to call the Service Desk. This “Tier 0” support is accomplished either through the knowledgebase, other online resources, intuitive applications, or through our Help.UNM self-service portal. Overall, IT saw desirable increased trends in efficiency by

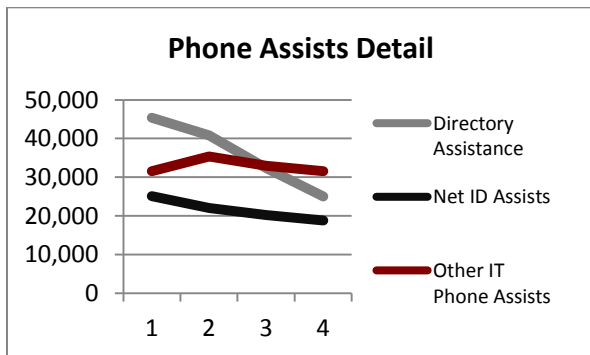
decreasing human intervention and increasing end-user self-sufficiency as illustrated in the following chart:

Area	2014	2015	1-yr Chg	5-yr Chg
Phone Assists	85.6K	77.7K	-11.4%	-28.2%
Walk-in Assists	2.8K	3.2K	9.6%	57.3%
Agt-Assisted Password Resets	21.5K	20.6k	-3.9%	-13.7%
Self-Served Ask-A-Question	13K	16K	20%	170%
FastInfo FAQ Hits	171K	260K	52.5%	137%

An increase in walk-in assists reflects successful student support at our existing and newly added Lobo BrainBar locations.

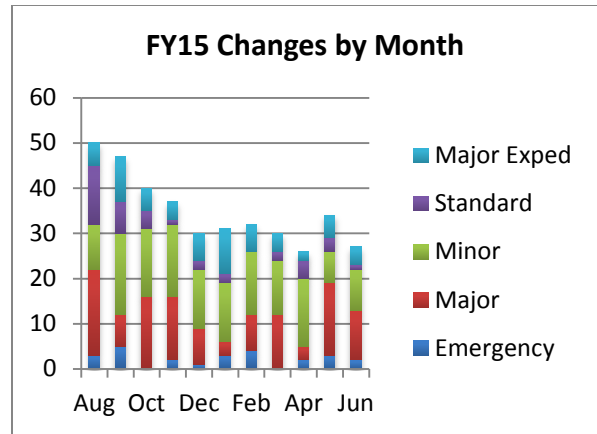


The above chart shows how self-service segments have increased over time, and more costly, resource intensive phone assists have decreased. The chart below provides information on the type of phone assist. Again, the decline in assists is related directly to a revamped online A-Z directory list and online self-service resources.



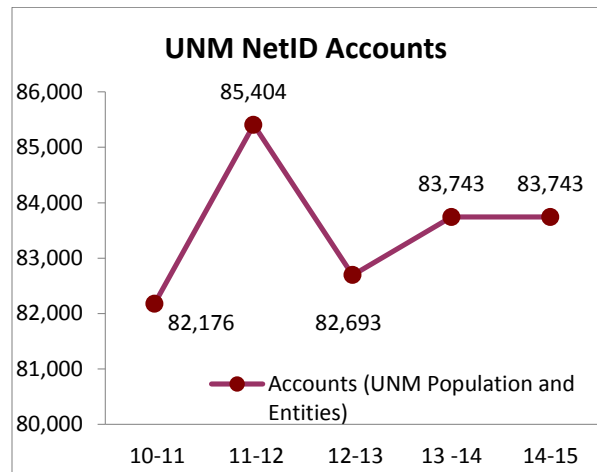
In FY15, IT conducted a major rehaul of its Help ticketing system

IT continues to refine the way that production **changes** are processed. By being more intentional about changing the production environment, efficiencies can be increased and outages that occur as a result of changes can be minimized.



Security & Access Services

IT provides accounts for students, faculty, and staff, and retains active accounts for students who are not enrolled in the current semester. Currently over 83,000 accounts are active. Maintaining passwords continues to be a primary service provided at the IT Service Desk.



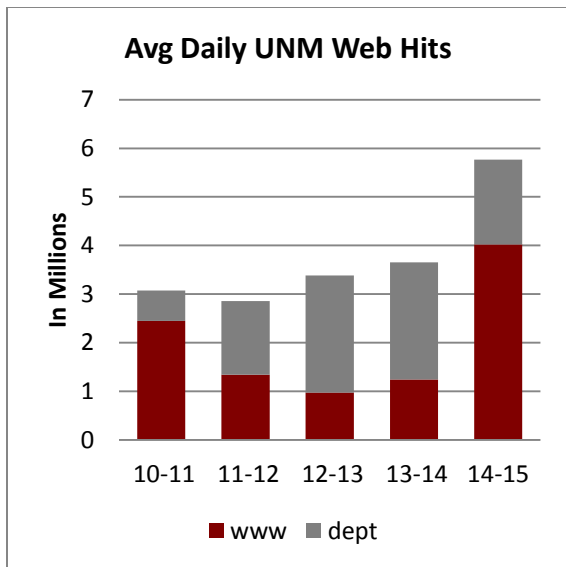
IT protects access to UNM data, to the wireless network, to ERP functions and to many more UNM services through NetID authentication.

IT works with Human Resources, Legal, and specific departments across all campuses in the events of copyright infringement notifications, departmental machine compromises, administrative security investigations involving IT resources and malware, intrusion, and

phishing attempts, resolving hundreds of these issues annually.

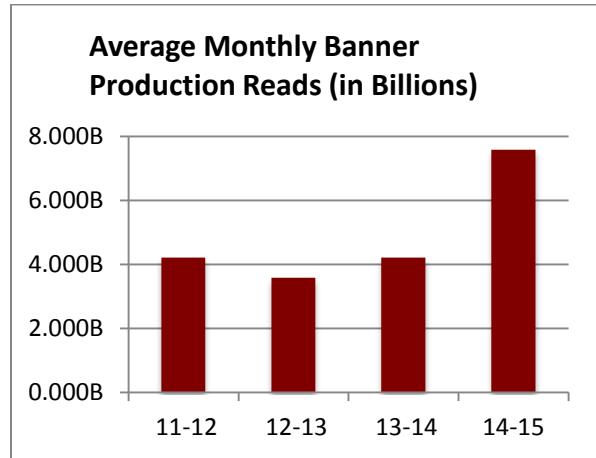
Applications & Web Services

IT develops, implements, and maintains enterprise applications and databases, the web infrastructure for UNM administrative systems, and innovative mobile applications. Web usage continues to increase, approaching a daily average of over 3.5 million hits/day (with less than 2 outages per month), as more departmental information and services are offered on the Web. As the infrastructure is updated, departmental sites are being migrated to the departmental web server infrastructure as total concurrent logins continue to rise.



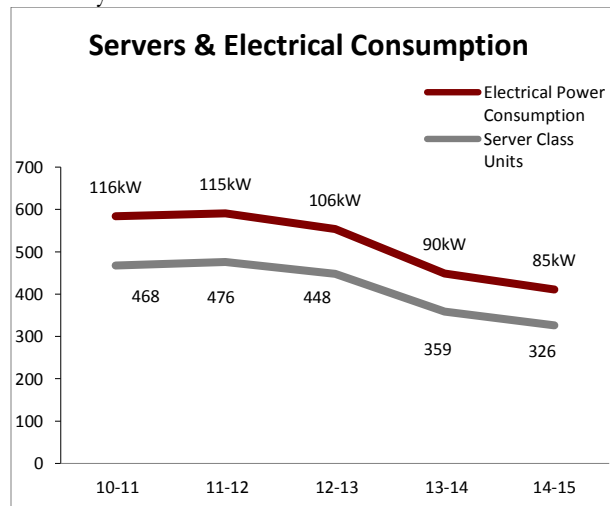
Banner ERP Production database activity increased by 80% to over 7.5 billion average monthly database “reads.” ODSP average monthly “reads” increased by 10% from 4.7 to 5.2 billion reads, due in part to an increase in nightly export, finance tracking detail reads, DPEZs, batch activity in student course and class data, as well as Payroll. Financial Aid audit trail logging has also increased. Approximately 6,400 POs were processed

through Banner with a total amount of \$110 million.



Server & Storage Services

We continue to virtualize servers and balance our application load on multiple servers to provide a consistent, reliable, and ‘green’ platform for applications. Kilowatt consumption decreased again this year by 5% to 85kW thanks to virtualization, which also reduced the number of physical server class units by 9% to 326.

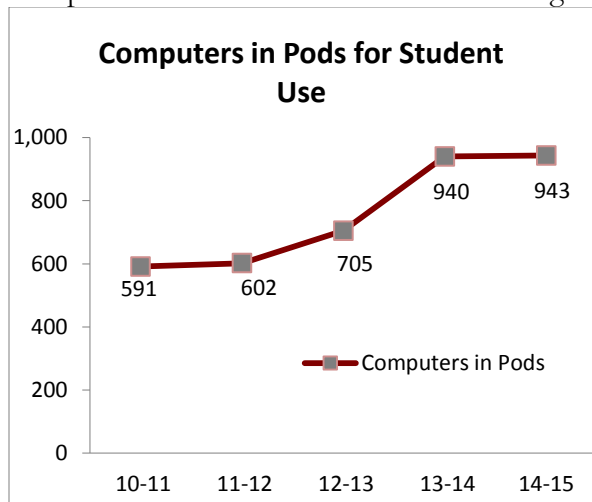


Disk space was also maintained at 1,172 terabytes to support enterprise applications and applications running on virtual servers and hosted for departments.

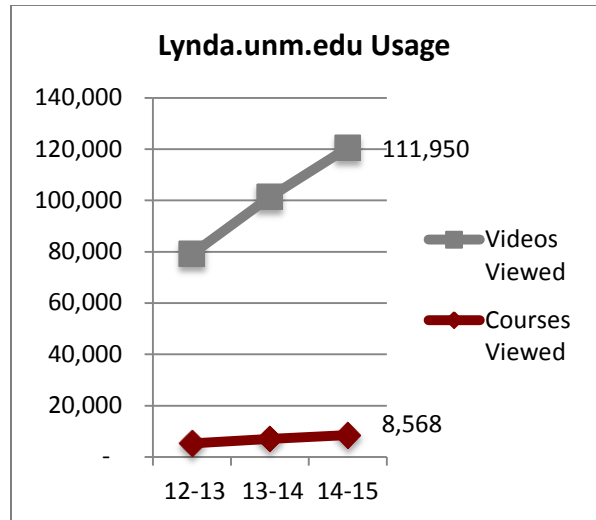
Computer Classrooms & Lab Services

IT provides technologies and services for classrooms and computer labs. This includes 26 registrar-scheduled computer classrooms and 16 pods (a 50% one-year increase), and 178 instructor podiums (27% increase) in generally scheduled classrooms. IT offers all main-campus UNM students access to over 943 computers, as well as printers and academic software. The Registrar also schedules regularly scheduled classes in IT-managed facilities. <http://it.unm.edu/pods> contains more information.

IT supports and provides the standard image for over 100 more student-facing computers in ethnic centers and a new lab on the South Campus in the SSSC across from LoboVillage.

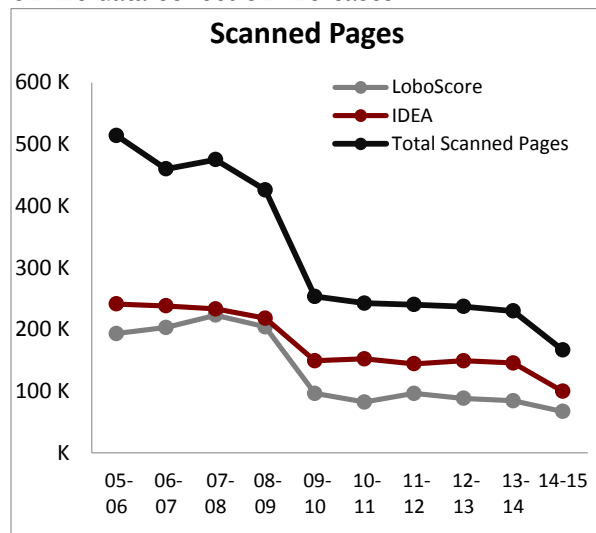


In FY15, faculty continued to increase the incorporation of Lynda.unm.edu in instruction. The number of courses viewed rose 20.9%. Videos viewed also increased by 19% to approximately 112,000. New accounts are driven by faculty use in courses.

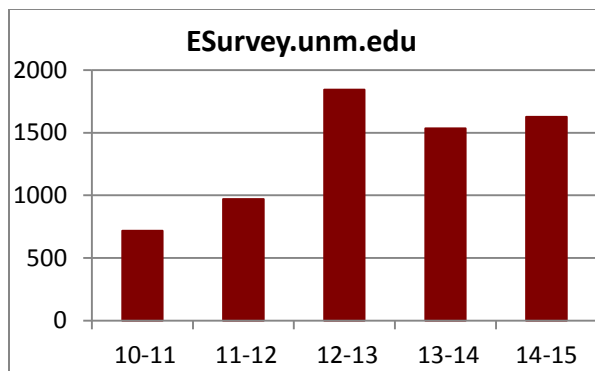


Scanning & Surveys

Scanning services are still used for test-scoring, although quizzes are now more frequently delivered on line through LEARN. Faculty course evaluations, used to support tenure track faculty, are also partially collected online, as well as on scanned forms. The demand for scanning is expected to continue to decrease as online data collection increases.



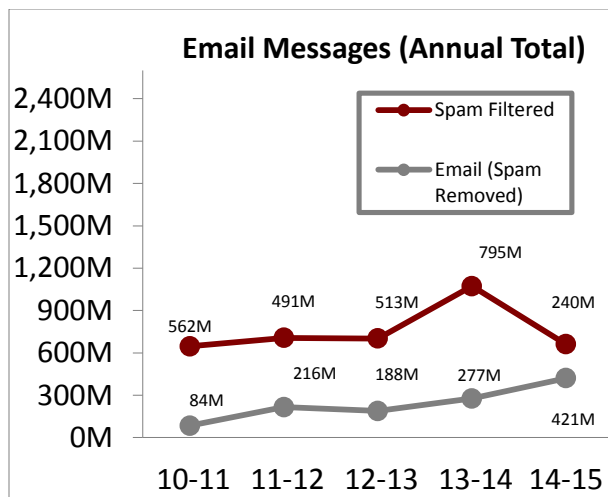
IT's ESurvey service increased by 5% in FY15 to over 1,600 surveys. The tool is widely used in student and faculty elections and polling. The rise in Opinio users may be due to the fact that IT provides survey tool training and supports users who need assistance building surveys, as opposed to other online options.



Email & Calendar Services

The Email Messages chart below shows incoming email spam removed and actual mail sent in the last five fiscal years. Email continues to increase, up by approximately 50% for the second year in a row.

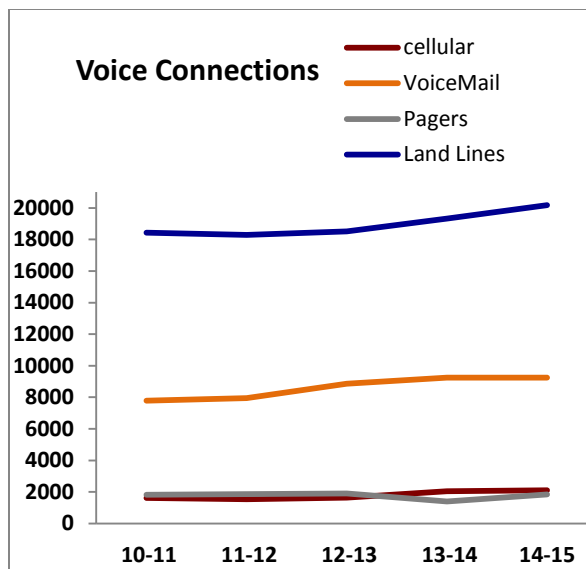
Email usage patterns continue to evolve. Trends indicate that legitimate UNM mail traffic is generally increasing, and student and faculty surveys continue to indicate that the preferred method of communication between students and faculty continues to be email.



Phone & Pager Services

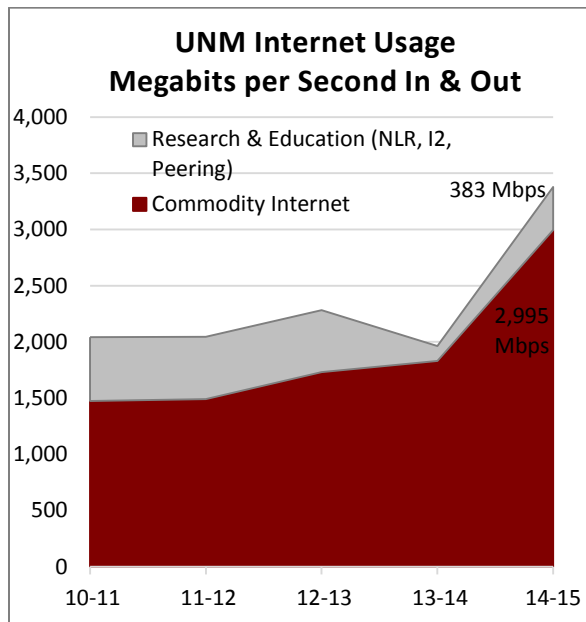
IT provides land-line and cellular telephone and pager services. Voice service has the second-highest transaction demand as departments continue to move staff, grow, and shrink. The overall total of phones in use

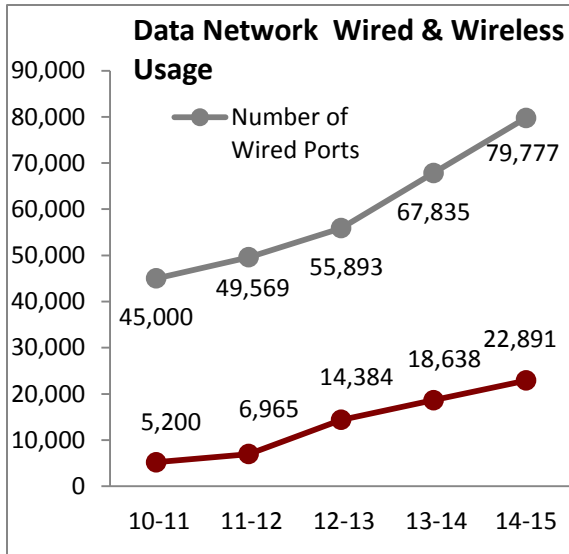
fluctuates frequently throughout the year and across years.



Networking Services

The wired and wireless campus network infrastructure for voice, video, and data communications is designed, developed, and maintained by IT. Network traffic is also managed and monitored for the utmost efficiency. The UNM network is relied upon by everyone on all UNM campuses, and by everyone who does business with UNM, including other institutions in the state.





We see a yearly increase in devices brought to campus by students, faculty, and staff. The following is a snapshot of mid-semester daily wireless usage in FY14-2015:

- Maximum clients on the network

(peak): 22,659

- Average clients: 12,587 daily
- Clients by Operating System
 - 44% IOS
 - 24% Android
 - 12% MAC OS X
 - 10% each Windows and Other OS

PC Hardware & Software Services

Desktop hardware and software purchases, licensing, hardware maintenance, and end-user support are core IT services delivered across UNM.

IT manages the campus licenses for software available either at no cost or at low cost to departments. Find more information at <http://it.unm.edu/software/>.

III. ACCOMPLISHMENTS IN FY 2014-2015

The following is a selection of specific accomplishments that demonstrate how IT connects, innovates, and serves the UNM and higher education communities in the State.

1. IT Infrastructure and Services in Direct Support of Learning

Connect

SUB Wireless Upgrade: UNM students allocated \$250,000 in student fees, to IT for wireless upgrades to the Student Union Building, which were completed in FY15. The completed project added 121 new wireless access points to the SUB, six times the previous number of 20 access points, and tripled internet speeds in and around the SUB.

Digital Signage: Digital Signage offers the University a way to communicate with the entire community, and offers the ability to offer emergency alert notifications beyond what the existing infrastructure currently offers. Education, research, and public services can be offered with the solution: showcasing student, faculty and staff achievements, thereby allowing the community to share and enrich in the academic experience.

Innovate

Mobile Applications Contest: The Office of the CIO sponsored a coding contest for students during the Fall 2014 semester. With support from coding mentors in collaboration with the Computer Science department and our internal IT Apps teams, students who use Open Data to create innovative mobile apps for cash prizes and potential further development.

Textbook Task Force: In conjunction with other entities on campus, the task force gathered and analyzed information and submitted a report regarding recommendations for digital textbooks usage to the Provost's Office.

Serve

One Drive: All UNM students, faculty, and staff have no-cost access to 25GB of online storage through the O365 suite of services.

Computer Lab Upgrades: Older PCs and Macs were replaced with new equipment in the University Advisement and Enrichment Center, Student Support and Services Center, GPSA, and Engineering and Science North labs, for a total of 17 new Macs and 138 new PCs.

LoboTrax Upgrade: The upgrade provided students and advisors with interactive roadmaps defining a clear path to graduation. Students can use roadmaps to build their own personal plans. The creation of term-by-term plans provides UNM with aggregate data needed for demand analysis and classroom scheduling.

LoboGuardian: LoboGuardian is a mobile app that increases user safety by creating a virtual safety network of friends and family. UNM community members can designate friends, family, and others as personal "Guardians" and establish Safety Timer Sessions. Users may also make a direct emergency call to the UNM Police Department in Albuquerque that automatically delivers Smart911 profile information to the police response team.

2. IT Infrastructure and Services Aligned with the Academic Enterprise: Instruction and Research

Connect

Community Outreach Events: IT holds community events targeting specific segments of the UNM population as an outreach effort to educate, listen, and collaborate with our constituents. Success at these events relies upon collaborations with faculty, key supporting vendors, and IT staff institution-wide. Campus and regional researchers attended the **Cyberinfrastructure Day** at NMTIE and **D2K** events to learn about data-driven scholarship. Over 200 students participated in **Security Days** events both semesters. Hundreds of IT staff present and learn from IT and each other at **Tech Days**. As an annual event, Tech Days has grown to over 200 technical and end-user attendees with communications reaching over 30,000 individuals. More detailed information about IT events is available at <http://cio.unm.edu/initiatives/technology-events.html>.

Innovate

NSF Grant for Research Network: Co-PIs Gil Gonzales, CIO, and Greg Taylor, Professor of Physics, were awarded a National Science Foundation (NSF) Campus CyberInfrastructure grant to design and pilot a dedicated Research Network for 14 researchers requiring high-speed transfer of data across campus and connection to Albuquerque GigaPoP (the UNM GigaPoP for access to high-speed research networks).

Serve

EvaluationKit: EvaluationKIT replaced IDEA for end-of-semester instructor and course evaluations in order to increase the use of and usability of student feedback for formative and summative purposes, provide greater flexibility in survey content and administration, provide online and mobile survey capabilities, and result in improved reporting with support for data extraction and analytics.

3. IT Services to Support the University Workplace

Connect

Skype for Business (Lync): Microsoft Skype for Business (Lync) is a comprehensive communications tool that combines presence, instant messaging (IM), desktop sharing, and audio-video conferencing. Its features include instant messaging (IM), audio and video conferencing, online meetings, availability (presence) information, and screen sharing capabilities.

Optimized Authentication System: In response to problems with authentication reported by users on campus, we optimized our authentication system to work better with wireless.

Innovate

ROM Academic Forecasting Application:

The Academic Forecasting Tool is designed to help units look at faculty, course, and financial data collectively to develop strategic forecasts for their academic unit. The Academic reports are designed to help units validate information entered into the Academic Forecasting Tool and monitor projections with actual data in real time. Additional reports are also accessible in the ROM reports portal, which include useful fiscal and academic data.

Business Analysts in Project Management Service Office: The IT Project Management Service Office added two term Business Analysts to provide support to departments so that business process changes can be managed concurrently with systems changes.

Serve

Voicemail Upgrade: The new voice mail system replaced an end-of-life system at UNM, including North and South Campuses and UNMH. The new system included enhancements such as the ability to listen to messages using a web browser

Banner XE Upgrades: Banner upgrades included new and improved functionality for Registration, Financial Aid, Student Accounts Receivable, and LoboWeb. Upgrades required collaboration with over 20 administrative offices across five campuses to test and certify the upgraded software.

Help.UNM: The user interface of Help.UNM was redesigned for easier navigation. The move to Cherwell systems will allow us to develop customized reporting for better service data and customer satisfaction metrics.

4. Services to External and Direct IT Customers

Connect

D2K (Data to Knowledge): The Office of the Vice President for Research and the Office of the Chief Information Officer sponsored an event dedicated to the advancement and interdisciplinary integration of New Mexico's research and teaching community to promote the sharing of data, approaches, expertise, and tools to solve data-enabled research challenges, as well as encouraged critical reflections on how data is used to create new knowledge. The event was open to all interested in data-enabled research and teaching across the Humanities, Social Sciences, the Arts, and Science, Technology, Engineering, and Math (STEM) fields.

Innovate

CC DNI NSF Grant Submission: Working in collaboration with NMSU and four smaller higher education institutions across New Mexico, we submitted a grant proposal to hold science, education, and economic development networking workshops across the state, and assisted small institutions in submissions of individual grants for NSF funding related to networking.

Serve

Regional Organization Service: The CIO, Deputy CIO, and many Directors and Managers of IT serve in regional and national organizations that are dedicated to emerging technology, best practices, collaboration, and planning in order to better connect and serve users of technology at UNM and beyond.

Some organizations include: New Mexico IT Commission, the Information Systems Committee for the City of Albuquerque, the Information Technology Advisory Committee for Albuquerque Public Schools, Western Regional Network, Educause, Building Industry Consulting Service International, New Mexico Technology Council, and the Association of College & University Technology Advancement.

5. University IT Decision-Making: Governance, Leadership, and Management Process

Connect

DataCenter Standard: In response to Audit Department findings and in conjunction with senior leadership, IT convened a datacenter standard working group comprised of technology professionals across campus to draft a datacenter standard. The drafting process will serve as a model for the development of more campus-wide standards.

Innovate

KSA Review: The Office of the CIO facilitated a review of information technologies across campus conducted by Salmon & Associates, an international management consulting firm. The review included campus interviews, surveys, peer institution interviews, stakeholder meetings, and the compilation of existing IT-related artifacts.

Serve

Payment Card Industry (PCI) Compliance Initiative: In conjunction with the Office of the EVP for Administration, the Information Security, and Privacy Office assisted UNM business units that process credit cards to improve their compliance with industry standard. All credit card activities will be brought into compliance within 18 months through standard solutions that are low-cost, easy to implement, and have the least impact on units.

Class 3 IT Projects: IT consistently plans and executes Class 3 projects, with charters and milestones listed on the portfolio. More information about the status of IT projects and services can be found on the Dashboard: <http://it.unm.edu/dashboard/>.

IV. PLANS FOR FY15-16

IT maintains a public list of major projects that extends beyond the current fiscal year. Prioritized IT projects can be found at <http://it.unm.edu/dashboard/>. Project status is updated quarterly; Appendix A contains the complete list.

High priority projects include:

- Cloud Services Task Force
- Standards for Enterprise Standards
- Classroom Technologies VDI
- UNM App Store
- Departmental Web Infrastructure Design Project
- Data Center Network & Security Redesign
- Global Threat Reduction Initiative
- Digital Media Repository

V. PERSONNEL INFORMATION

Appointments, Promotions, and Separations - July 1, 2014 – June 30, 2015

Appointments

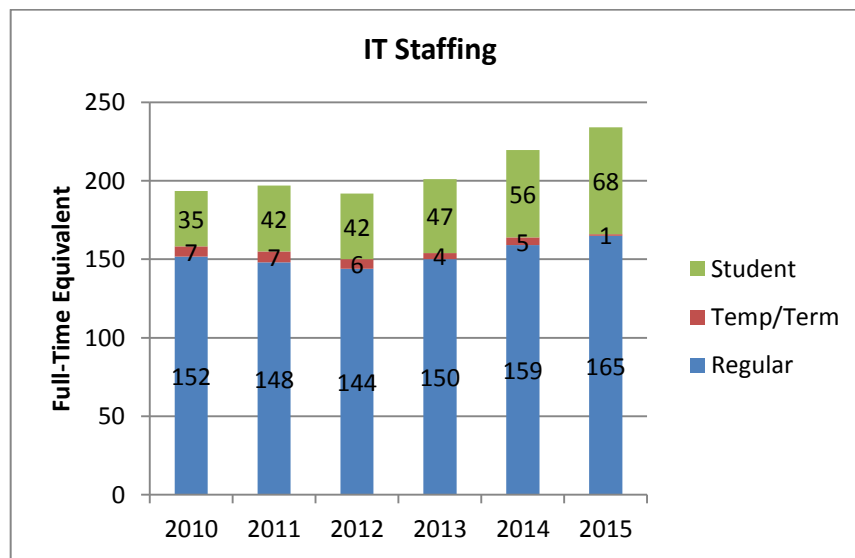
Employee Name	IT Unit	Position	Hire Date
Lawrence Alderete	Security	Technical Support Analyst 1	4/14/2015
Ted R Anaya	Applications	Analyst/Programmer 3	7/28/2014
Bruce D. Armstrong	Office of the CIO	Program Specialist	4/6/2015
Chris B. Bandy	Platforms	Systems Specialist	3/2/2015
Chris B. Bandy	Classroom Technology	Systems Specialist	1/6/2015
Mary L. Berrens	Applications	Analyst/Programmer 3	1/20/2015
Garth Colasurdo	Applications	Applns Support Specialist	7/14/2014
Gilbert J. Garduno	Office of the Deputy CIO	Business Analyst, Sr	1/26/2015
Carol E. Hines	Applications	Analyst/Programmer 3	8/11/2014
John Impallomeni	Platforms	Systems Analyst 3	8/25/2014
Lynn F. Judkins	Applications	Analyst Programmer 3	3/20/2015
Letisha L. Kaskaske	Applications	Analyst Programmer 2	1/8/2015
Jason L. Krueger	Customer Service	User Support Analyst 3	2/16/2015
Glenn R. Nicol	Applications	Mgr, Applns Programming	6/22/2015
Steven M. Perry	Networks	Dir, IT Services	10/6/2014
Neil S. Sabol	Applications	Technical Support Analyst 2	12/1/2014
Kahleck Torran	Applications	Analyst Programmer 1	3/16/2015
Alesia M. Torres	Applications	Assoc Dir, IT Services	6/22/2015
Brandon W. Wieser	Security	Technical Support Analyst 2	6/10/2015
Eric W. Woods	Security	Mgr, IT Technical Support	12/17/2014
Florence N. Wyman	Platofrms	Systems Analyst 3	6/15/2015

Promotions/Transfers

Employee Name	Position	Previous Position	Hire Date
Johnathon C. Bell	Network Tech	Technical Support Analyst 1	10/20/2014
Chin-Liang P. Chang	Assoc Dir, IT Services	Network Engineer 3	2/2/2015
Susan M. Elliot	Technical Support Analyst 2	Technical Support Analyst 1	7/1/2014
Jared A. Galbraith	Systems Specialist	Systems Analyst 3	7/15/2014
David K. Jones	Systems Specialist	Systems Analyst 3	2/9/2015
John R. Paez	Technical Analyst 2	Technical Support Analyst 1	4/20/2015
Elaine S. Rising	Business Analyst Sr.	Program Coordinator	1/20/2015
Carlos E. Silesky	Mgr. IT Technical Support	Systems Specialist	4/1/2015
Lorraine M. Tafoya	Assoc. Dir. IT Services	Mgr., IT Technical Services	12/1/2014
Sonya B. Torrez	Systems Analyst 2	Analyst Programmer 2	12/22/2014
Louis A. Vottero	User Support Analyst 3	User Support Analyst 2	1/20/2015

Separations

Employee Name	IT Unit	Reason	Separation Date
Ted Anaya	Applications	Resignation	1/22/2015
Drexel Atkinson	Platforms	Retirement	7/31/2014
Gary Bauerschmidt	Networks	Retirement	10/31/2014
Paige Briggs	Applications	Resignation	4/30/2015
Dianne Byrd	Customer Service	Retirement	4/20/2015
Tatiana Djidjeva	Applications	Resignation	5/31/2015
Norma Emerick	Finance	Retirement	4/30/2015
Jason Foutz	Applications	Resignation	3/13/2015
Jane Green	Applications	Retirement	10/31/2014
Carol Hines	Applications	Resignation	12/2/2014
Candice Lai	Applications	Resignation	3/31/2015
Sa Heon Lee	Customer Service	Retirement	6/30/2015
Beth Lowery	Applications	Retirement	1/31/2015
Kenneth Ma	Platforms	Retirement	1/31/2015
Chris Martinez	Customer Service	Retirement	6/30/2015
Dominic Martinez	Applications	Resignation	5/22/2015
Greg Mays	Customer Service	Resignation	3/31/2015
Zachary Pancratz	Finance	Resignation	1/29/2015
Janet Rangel	Applications	Retirement	4/3/2015
Ochressandro Rettinger	Platforms	Resignation	11/3/2014
Glen Schwickerath	Applications	Resignation	9/9/2014
Janice Sonetz	Applications	Retirement	1/31/2015
Andrew Yoder	Customer Service	Resignation	2/13/2015



VI. APPENDICES

Appendix A: IT Major Projects

IT Major Projects Dashboard as of June 30, 2015

Area of Strategic Focus	OD Priority	Project Name	IT Management Champion	Sept Status	Dec Status	Mar Status	June Status	Original Target completion	Current Target completion	Significant Deliverables this FY	R/G/T*	New Funding?	Funded Amount	HSC Overlap?	Area of HSC Overlap**	Core IT	UMM 2020 Goal (specific)	Compliance/Integrity	
Infrastructure and Services in Direct Support of Learning																			
1-High		Prep for BYOD (One to One Computing Strategy) (V/D)	Maira Garey	Not Started	Some Progress	Some Progress	Good	12/31/2015	12/31/2015	strategy and plan	Grow	Yes		Yes	Education technology support	Yes	Prepare Laptops for lifelong Success	No	
1-High		Digital Media Management Suite Selection Program	Maira Garey	Good Progress	Some Progress	Some Progress	Good	11/31/2015	On-Going	Implementation of Enterprise Digital Signage	Transform	Yes		Yes	Education technology support	Yes	Become a Destination University	System Integrity	
1-High		UAchieve v4.2 /Udirect Implementation	Diane Arnuti	Good Progress	Good Progress	Good Progress	Good	11/01/2014	07/24/2015		Grow	No		Yes	Education technology support	Yes	No	No	
1-High		0365: Program	Diane Arnuti	Good Progress	Good Progress	Good Progress	Good	12/31/2017	On-Going		Grow	No		Yes	Education technology support	Yes	No	No	
1-High		Classroom Innovations program: continue English/Music collaborations	Maira Garey	Good Progress	Good Progress	Good Progress	Good	5/31/2015	On-Going	Add "computer classrooms" for Freshman English	Transform	Yes		No	Education technology support	Yes	No	No	
1-High		Banner XE Initial Deployment Project	Diane Arnuti	Not Started	Not Started	Not Started	Not	October 2015	Completion		Run	No		No		No	No	No	
1-High		0365: Lync 2013: Phase 1	Steve Perry	Some Progress	Some Progress	Some Progress	Good		Phase 1 Completion		Grow	No		Yes	Network Infrastructure	Yes	No	No	
2-Medium		Social Learning Site Development	Maira Garey	Not Started	Not Started	Not Started	Not	5/31/2015	5/31/2016		Transform	No		Yes	Education technology support	Yes	Promote Institutional Citizenship	No	
2-Medium		Replace end-of-life E911 system	Steve Perry	Not Started	Not Started	Not Started	Not				Run	Yes		Yes	Network Infrastructure	Yes	No	Legal Requirement	
2-Medium		Mobile Registration, Add/Drop	Diane Arnuti	Good Progress	Good Progress	Good Progress	Good				Grow	No		Yes	Education technology support	Yes	No	No	
2-Medium		Coding Lab	Maira Garey	Not Started	Some Progress	Some Progress	Some	Fall 2015	Fall 2016	Concept Paper	Grow	Yes		No		Yes	Prepare Laptops for lifelong Success	No	
2-Medium		Student Profiles	Maira Garey	Not Started	Not Started	Not Started	Not	9/15/2015	12/31/2015	strategy	Grow	No		No		Yes	No	No	
2-Medium		0365: SharePoint 2013: SharePoint Online POC	Brian Pietrewicz	Not Started	Not Started	Not Started	Some Progress				Grow	No		Yes		Yes	No	No	
2-Medium		IT 153 Electrical Maint	Brian Pietrewicz	Not Started	Not Started	Not Started	Not				Run	No	\$	-	Data centers	Yes	No	System Integrity	
Infrastructure and Services Strategically Aligned with the Academic Enterprise: Instruction & Research																			
1-High		Student Engagement Improvement: Budget Proposal for CRM	Maira Garey	Good Progress	Good Progress	Good Progress	Good	10/31/2014	12/31/2015	Partners identified	Grow	Yes		Yes	Customer support	Yes	Promote Institutional Citizenship	No	
1-High		GTRI C Core 9000	Maira Garey	Good Progress	Good Progress	Good Progress	Good	9/30/2015	6/30/2018	Enterprise Platform Upgraded	Grow	Yes		Yes	Network Infrastructure	Yes	Ensure financial integrity and Strength	Legal Requirement	
1-High		Infrastructure as a Service: Improvements	Brian Pietrewicz	Achieved	Progress	Progress	Progress	Summer 2015	Summer 2015		Grow	No		Yes	Network Infrastructure#Education technology support#Policies &	Yes	No	Data Security & Privacy	
1-High		Banner Extensible Ecosystem (XE) version 9 Student Proof of Concept	Diane Arnuti	Good Progress	Good Progress	Good Progress	Good	7/31/2015	10/17/2015		Run	Yes		Yes	Education technology support	Yes	No	No	
1-High		Statewide Broadband Improvements	Maira Garey	Good Progress	Good Progress	Good Progress	Good		On-going		Transform	Yes		Yes	Network Infrastructure	Yes	Advance Discovery and Innovation	No	
1-High		Science DMZ Network (NSF CC IIE Grant Implementation)	Steve Perry	Some Progress	Good Progress	Good Progress	Some	August 2016			Grow	Yes	\$ 450,000	Yes	Network Infrastructure	No	Advance Discovery and Innovation	No	
1-High		CIO Community Engagement Program	Maira Garey	Good Progress	Good Progress	Good Progress	Good		On-going	DXL plan, Apps contact initiation; IMITIE Cyber.	Grow	No	\$ 25,000	No	Customer support	No	Advance Discovery and Innovation	No	
1-High		Courses Evaluation (IDEA) Replacement	Maira Garey	Good Progress	Good Progress	Good Progress	Good	9/31/2015	5/31/2015	Wrap up rollout & policy decisions	Run	No		Yes	Education technology support	Yes	No	No	
2-Medium		UNIM App Store	Diane Arnuti	Not Started	Good Progress	Good Progress	Some	12/31/2015	12/31/2015		Grow	No		No	Education technology support	No	No	No	
3-Low		Portal Replacement	Diane Arnuti	Not Started	Good Progress	Good Progress	Some	12/31/2015	12/31/2015		Run	No		Yes	Education technology support	Yes	No	No	
Services for the University Workplace																			
1-High		Departmental Web Infrastructure Design project	Brian Pietrewicz	Good Progress	Good Progress	Good Progress	Good		Aug 2015 for Self-service website hosting project		Run	No		No		Yes	No	Data Security & Privacy	

Areas of Strategic Focus	OD Priority	Project Name	IT Management Champion	Sept Status	Dec Status	Mar Status	June Status	Original Target completion	Current Target completion	Significant Deliverables this FY	R/G/T*	New Funding?	Enfnd Amt (\$)	W/C Overlay?	Area of HSC Overlay**	Core IT?	UM 2009 Goal (Specific)	Compliance/Integ (Y/N)	
1-High	1-High	DC/Net/Sec Re-design Program	Brian Pietrewicz & Steve Perry	Good Progress	Good Progress	Some Progress	Good Progress	Nov 2014	On-Going	Program Roadmap	Run	Yes	\$ 515,000	Yes	Network infrastructure#Data centers	Yes	No	Data Security & Privacy	
1-High	1-High	LoboTime Implementation Phase II	Duane Arruti	Some Progress	Some Progress	Good Progress	Good Progress	April 2015	September 2015	All Depts on boarded, Process for new depts in place	Run	Yes	No	No		No	No	Audit Follow-up	
1-High	1-High	Replace end-of-life voicemail system	Steve Perry	Not Started	Not Started	Good Progress	Achieved Progress	April 2015	May 2015		Run	Yes	Yes	Yes	Network Infrastructure	Yes	No	System Integrity	
1-High	1-High	ACL Software Implementation	Duane Arruti	Good Progress	Some Progress	Achieved Progress	Achieved Progress	9/2014	9/2014	Data Extract	Run	No	Yes	Yes	Policies & Procedures	Yes	No	Legal Requirement	
1-High	1-High	OPBA HED reporting, Phase 2	Duane Arruti	Achieved Progress	Achieved Progress	Achieved Progress	Achieved Progress			4 reports	Run	No	No	No		Yes	No	No	
1-High	1-High	Strengthen Access Controls on Direct Deposit Allocation page	Duane Arruti	Not Started	Some Progress	Some Progress	Good Progress	07/31/2015	10/30/2015		Run	No	No	No	Education technology support	Yes	No	Data Security & Privacy	
2-Medium	2-Medium	Mobile Device Mgmt for UNM-owned devices (POC)	Ti Martinez	Not Started	Some Progress	Some Progress	Good Progress	June 2015	Sept 2015	Pilot	Run	Yes	Yes	Yes	Common help desk approaches#Customer support#Policies Purchasing & contracting	Yes	No	Data Security & Privacy	
2-Medium	2-Medium	Evaluation of Ellucian Applicant Tracking/Learnlab	Duane Arruti	Not Started	Some Progress	Some Progress	Some Progress				Run	Yes	Yes	Yes		Yes	No	No	
2-Medium	2-Medium	Replace NetID application	Brian Pietrewicz	Not Started	Some Progress	Some Progress	Stopped Progress				Grow	No	\$ -	-	Yes	Yes	No	No	
3-Low	3-Low	Institutional Resource Directory	Moira Gearty	Not Started	Not Started	Not Started	Some Progress	On-going	On-going	Committee work completed to develop course materials	Run	No	Yes	Yes	Common help desk approaches#Customer	Yes	Promote Institutional Citizenship	No	
Services Provided to External & Direct IT Customers																			
3-Low	3-Low	Open Data Repository Phase 2	Duane Arruti	Not Started	Not Started	Not Started	Stopped Progress				Run	No	No	No		Yes	No	No	
University IT Decision Making: Governance, Leadership & Management Process																			
1-High	1-High	UNM Results Oriented Management Forecasting Tool (ROM) Phase II	Duane Arruti	Good Progress	Good Progress	Good Progress	Achieved Progress				Grow	No	No	No		No	Prepare Lobo for Lifelong Success	No	
1-High	1-High	Business Analysis Practice Development	Moira Gearty	Not Started	Some Progress	Some Progress	Good Progress	12/31/2015	12/31/2015	Business Case approval practice	Run	Yes	\$ 100,000	No		No	No	No	
1-High	1-High	Info Security & Privacy Program	Jeff Gasaway	Some Progress	Some Progress	Some Progress	Good Progress	On-Going	On-Going	Security website reflects program components	Grow	Yes	Yes	Yes	Network infrastructure#Education technology support#Policies & desk approaches#Customer	Yes	Ensure Financial Integrity and Strength	Data Security & Privacy	
1-High	1-High	UNM IT Review (KSA)	Gl Gonzales	Good Progress	Good Progress	Good Progress	Achieved Progress	Nov 2014	June 2015	Completion	Run	Yes	Yes	Yes	Network infrastructure#Common help desk approaches#Customer	Yes	Ensure Financial Integrity and Strength	No	
2-Medium	2-Medium	UNM Business Impact Analysis for Business Continuity	Jane McGuire	Not Started	Some Progress	Some Progress	Stopped Progress			Survey Pilot	Run	No	No	Yes	Network infrastructure#Education technology support#Data centers	Yes	No	No	
2-Medium	2-Medium	WebFOCUS MyReports Upgrade	Duane Arruti	Some Progress	Good Progress	Good Progress	Achieved Progress	12/19/2015	5/23/2015	Events	Run	Yes	\$ 57,079	No		Yes	No	System Integrity	

• **Run/Grow/Transform concerns Education, not IT. Definition of Gartner terms:** <http://blogs.gartner.com/richard-hunter/a-few-things-about-running-growing-and-transforming-in-the-cloud/>

Transform: IT resources consumed and focused on implementing technology systems that enable the enterprise to enact new education, research & administrative models.

Grow: IT resources consumed and focused on developing and enhancing IT systems in support of business growth in established markets. Discretionary investments grow the business or transform the cost.

Run: Carry out essential enterprise activities that sustain the operation of the enterprise.

•• **Priority Rubric**

- Core IT ~ Common Good IT Services - % of community who benefit
- Alignment with institutional goals
- Compliance/System Integrity

Area of Strategic Focus	OD Priority	Project Name	IT Management Champion	App Status	Dec Status	Mar Status	Jun Status	Original Target completion	Current Target completion	Significant Deliverables this FY	R/G/T*	New Funding?	Funded Amount	HSC Overlap?	Area of HSC Overlap**	Core IT	UHM 2020 Goal (specific)	Compliance/Integ. IIT?
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*** Areas of HSC Overlap

These areas were identified in the KSA planning exercise with the HSC in 2014. They represent coordination points for both organizations: Network Infrastructure, Common help desk approaches, customer support, education technology support, policies & Procedures, high-performance computing infrastructure, purchasing & contracting, data centers



FY 2014-2015 Annual Report

Institutional Support Services

Submitted by:

Chris Vallejos, Associate Vice President

<http://iss.unm.edu>

Mission and Vision

Mission

Institutional Support Services (ISS) delivers seamless services and programs for students, faculty, staff, visitors, and patrons through UNM Business Enterprises, Real Estate Development, and Facilities & Campus Planning groups with a focus on competitiveness, outstanding customer service, sustainability efforts, and the creation of unique experiences, while supporting the University’s core mission.

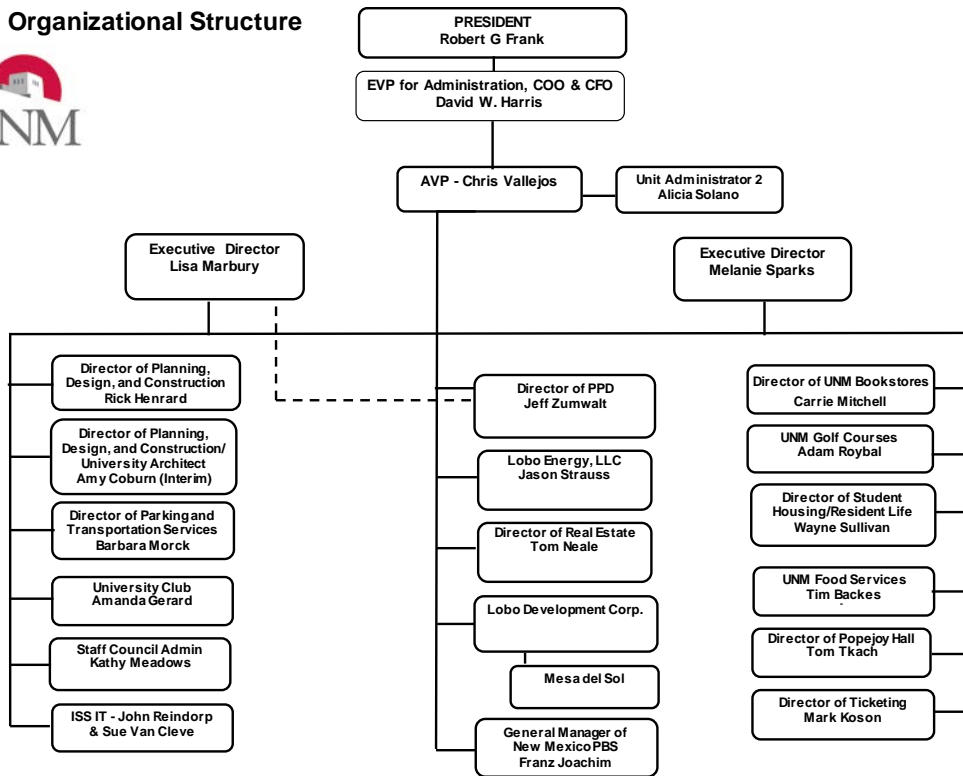
Vision

ISS established the University of New Mexico as the preferred educational destination for students, faculty, staff, visitors, and patrons through the provision of a sustainable campus environment that advances scholarly pursuits and enhances the quality of life by the delivery of outstanding services, identifiable values, and exceptional experiences.

Organizational Chart

Institutional Support Services

2015 Organizational Structure



2014-2015 Annual Report**Table of Contents**

I.	Executive Summary	4
II.	Overview	4
III.	Accomplishments & Significant Developments	5
IV.	Future Plans & Goals FY15-16	6
V.	Department Staffing Information	8
VI.	Appendices	8
	Appendix A: UNM Bookstores	9
	Appendix B: UNM Dining & Food Services	17
	Appendix C: Faculty & Staff Club	23
	Appendix D: UNM Golf Courses	28
	Appendix E: New Mexico PBS	33
	Appendix F: Parking & Transportation Services	47
	Appendix G: Physical Plant Department	58
	Appendix H: Planning, Design & Construction	76
	Appendix I: Popejoy Hall	96
	Appendix J: Residence Life and Student Housing	121
	Appendix K: Real Estate Department	129
	Appendix L: Staff Council	134
	Appendix M: Ticketing Services	140

I. EXECUTIVE SUMMARY

Institutional Support Services (ISS) had many key accomplishments for FY14-15 and overall had a very successful year. ISS finalized their organizational restructuring with the addition of a Unit Administrator 2 position and removal of “Interim” titles for the Executive Project Directors. ISS also created two committees to focus on employee and UNM community engagement and education: ISS Communications & Marketing Committee and ISS Awards & Recognition Committee. Some initiatives underway by these committees include an ISS employee newsletter, website redesign, digital signage, brochures, and a formalized awards and recognition program.

ISS divisions continue to grow and make both capital and process improvements. A significant accomplishment in FY15 was the merge between the Office of Capital Projects and Planning & Campus Development into a single functional unit: Planning, Design & Construction. The goal of the unit merge was to create seamless delivery of professional support services and to facilitate best practices in capital project planning, development, and construction. UNM Bookstores remodeled their main store lobby and lobby bathrooms. Popejoy Hall expanded their Benefactors Lounge which increased contributions to the Benefactor Program. In coordination with Chartwells and Planning, Design & Construction, UNM Dining & Food Services participated in two buildout projects to introduce Subway and WisePies into the retail mix at the Student Union Building.

Several ISS divisions received awards and recognition in their respective fields. In July 2014, Physical Plant Department received the Award for Excellence from the leading education facilities industry group, APPA. Golfweek Magazine ranked the UNM Championship Golf Course the #1 golf course to play in Albuquerque.

Overall, ISS divisions were able to reach or exceed financial goals for the fiscal year. The total budget for all ISS divisions was \$123,966,348. Total available reserve was \$6,604,315, with \$2,250,155 and \$4,331,359 categorized towards commitments and dedications respectively. At the end of FY14-15, ISS was able to contribute \$1,500,000 to the University to help support the academic/student mission.

II. OVERVIEW

ISS is a consolidation of the Business Enterprise, Real Estate & Business Development, and Facilities & Planning units at the University. These units report to Associate Vice President, Chris Vallejos, and Executive Project Directors, Lisa Marbury and Melanie Sparks. The following departments report to ISS:

Business Enterprises
 Ticketing Services
 UNM Bookstores
 Popejoy Hall
 UNM Golf Courses
 NMPBS

Real Estate & Business Dev.
 Real Estate
 Lobo Development Corp.
 Mesa Del Sol

Facilities/Campus Planning
 Planning & Campus Dev.
 Office of Capital Projects
 Physical Plant Department
 Parking and Transportation Svcs
 Lobo Energy

Residence Life & Student Housing
 UNM Dining & Food Services
 UNM Faculty Staff Club

ISS also oversees the administrative office of UNM Staff Council.

III. ACCOMPLISHMENTS & SIGNIFICANT DEVELOPMENTS

The following is a summary of significant developments that occurred within the ISS units for FY14-15:

- ISS created a Communications & Marketing Committee to focus on promoting ISS to the UNM community. First initiatives include a monthly ISS social and happy hour with staff and the creation of an all ISS listserv.
- ISS Awards & Recognition Committee was created. This committee collects information from ISS employees to develop and implement several awards programs for next fiscal year.
- UNM Bookstores introduced Electronic Shelf Labels for the Textbook Department at the Main Store. This reduced shelving spaces from 4,700 to 2,672 and decrease labor hours by over 30%.
- UNM Bookstores developed an Inclusive Access Program for digital course materials. This allowed all students to have course materials on their first day of classes at significantly reduced rates.
- UNM Golf Courses had 4,200 tournament rounds hosted by the Championship course, including two intercollegiate tournaments and a national junior tournament. Golfweek Magazine ranked the Championship course the #1 golf course to play in Albuquerque.
- New Mexico PBS membership raised \$2,868,206 against a goal of \$2,800,000. It was the highest grossing year for donor support in the station's history with a 4.9% increase over FY14.
- Parking and Transportation Services started a compressed natural gas tank replacement program to save on new bus purchases.
- Parking and Transportation Services saw an overall increase of 27% (\$106,000) in Special Events revenue from FY14-15: 33% from outside sources, 28% from Popejoy, and 12% from Interdepartmental.
- Planning & Campus Development (PCD) and the Office of Capital Projects (OCP) successfully merged into a single, functional unit: Planning, Design & Construction.
- Planning, Design & Construction completed a total of 46 projects on time, on budget, and with good quality and service. This was a significant increase (26%) to the prior two years.
- With 79 performances total, more than 127,000 patrons attended Popejoy Hall's Broadway and Ovation Series shows throughout the year. Additionally, 18 educational programs were attended by more than 58,000 school children.

- Popejoy conducted a feasibility study to determine the scope of capital improvements that could be funded during the next five years. The study included interviewing donors and community leaders to get their insight about Popejoy and the proposed capital improvements.
- In July 2014, PPD received the Award for Excellence from the leading education facilities industry group (APPA). The award was based on an exhaustive assessment of PPD's systems, processes, activities, and people. This is the highest institutional honor bestowed by APPA.
- PPD entered into an agreement with Sightlines to compare operational performance with the 450 other campuses in their program. The results will be used to focus on improving operational performance.
- PPD created an annual training program for managers and supervisors.
- The Resident Program efforts at Residence Life and Student Housing was strong, with over 1,600 programs implemented by resident advisors, Community Associations, Residence Hall Association, and on-campus housing organizations.
- Residence Life and Student Housing completed several major facility projects: FOB proximity access for Coronado Hall, partial roof replacements for Alvarado and Student Housing, and updated wireless access for several residence halls.
- Ticketing Services had the highest service charge revenue for a fiscal year (\$836,841).
- Ticketing Services developed and implemented enhanced online seating maps for major venues.
- UNM Dining & Food Services underwent a new RFP process to select a new campus food vendor. Chartwells was awarded the new contract.
- The Staff Council celebrated its 25th anniversary and had several notable accomplishments: implementation of the Staff Council Strategic Plan, website redesign, implementation of community engagement leave policy for staff, and creation of the Outstanding Supervisor Award Program.
- During FY15, Real Estate Department closed four transactions valued at \$8,050,000, including land at Sunshine Terrace, the former First Baptist Church, and the former Taos Civic Center.
- The Faculty and Staff Club worked closely with Chartwells to expand the products available to guests, including complimentary hors d'oeuvres during happy hour and the addition of signature cocktails.

IV. FUTURE PLANS & GOALS FY15-16

The following is a summary of the projects that are currently in progress or a future goal for ISS units in FY15-16:

- The ISS Communications & Marketing Committee will continue to move forward with the following initiatives: a quarterly ISS newsletter, website redesign, and a brochure to highlight some of the services and programs that we offer.
- ISS Awards & Recognition Committee will use the data gathered from their summer survey to write a program proposal. The committee's goal is to implement this program in FY16.
- UNM Bookstore will develop a Marketing Program to Alumni and a Customer Loyalty Program. They will also work towards expanding their ecommerce initiatives.
- UNM Golf Courses will work with Bernalillo County on North Course phase II, which includes reclaimed water from the Ford Utilities Chiller Plant to the reservoir.
- UNM Golf Courses will continue to work with the First Tee of Greater Albuquerque to extend a multi-year agreement to provide a long term home at the Championship Course.
- New Mexico PBS is working to secure the services of a public media underwriting consultant to increase corporate gift revenue.
- Pending securing a capital request in the 2016 Legislative Session, New Mexico PBS will begin a rebuild of KNME/KNMD master control systems.
- Parking and Transportation Services will purchase new pay station equipment to replace current equipment that cannot be made PCI/EMV compliant.
- Planning, Design & Construction will develop strategic plans for increasing the effective development of UNM campuses.
- Popejoy plans on making capital improvements to the following: lower lobby and public lounge, balcony lobby and public lounge, and artists' facilities.
- PPD will move forward with a Space Utilization Initiative and follow-up with a policy making effort in collaboration with the Provost's Office.
- PPD website will be redesigned and moved to UNM's web content management system (Cascade).
- PPD will continue to move forward with the completion of the sustainability strategic plan.
- Residence Life and Student Housing will continue to develop their internal policies and procedures and find operational efficiencies.
- Ticketing Services will transition their ticketing system from Enta USA to Best Union, and pursue a long-term relationship with Best Union.
- UNM Dining & Food Services will complete an analysis of satellite locations on the main campus and the north campus to ensure that food service hours and offerings are consistent with the needs of the campus community.
- Real Estate Department will focus on improved financial reporting and staff development.
- The Faculty and Staff Club will rebrand itself as the University Club and focus on initiatives to grow the membership base.

V. DEPARTMENT STAFFING INFORMATION

ISS saw several changes in staff over FY14-15, including an employee transfer, hire, and appointments. In July 2014, Danette Petersen, formerly with Planning & Campus Development transferred to ISS to assist with administrative support. In August 2014, Alicia Solano, was hired into our newly created Unit Administrator 2 position. This position was created to help manage the day-to-day business activities of our unit and provide support for both internal and external customers. This position helps provide oversight of department budgets and Human Resources activities and initiatives. Another significant change during FY14-15, was the removal of the “Interim” titles for Melanie Sparks and Lisa Marbury. Both are now classified as Executive Directors over specific departments in our unit.

Appointments

Lisa Marbury, Executive Project Director
Melanie Sparks, Executive Project Director

Hires

Alicia Solano, Unit Administrator 2
Danette Petersen, Administrative Assistant 2 (transfer from former PCD)

Separations

Danette Petersen, Administrative Assistant 2

VI. APPENDICES

Appendix A: UNM Bookstores
Appendix B: UNM Dining & Food Services
Appendix C: Faculty & Staff Club
Appendix D: UNM Golf Courses
Appendix E: New Mexico PBS
Appendix F: Parking & Transportation Services
Appendix G: Physical Plant Department
Appendix H: Planning, Design & Construction
Appendix I: Popejoy Hall
Appendix J: Residence Life and Student Housing
Appendix K: Real Estate Department
Appendix L: Staff Council
Appendix M: Ticketing Services

Appendix A



FY 2014-2015 Annual Report

UNM Bookstores

Submitted by:

Carrie Mitchell, Director

<http://bookstore.unm.edu>

<http://loboden.unm.edu>

Mission and Vision

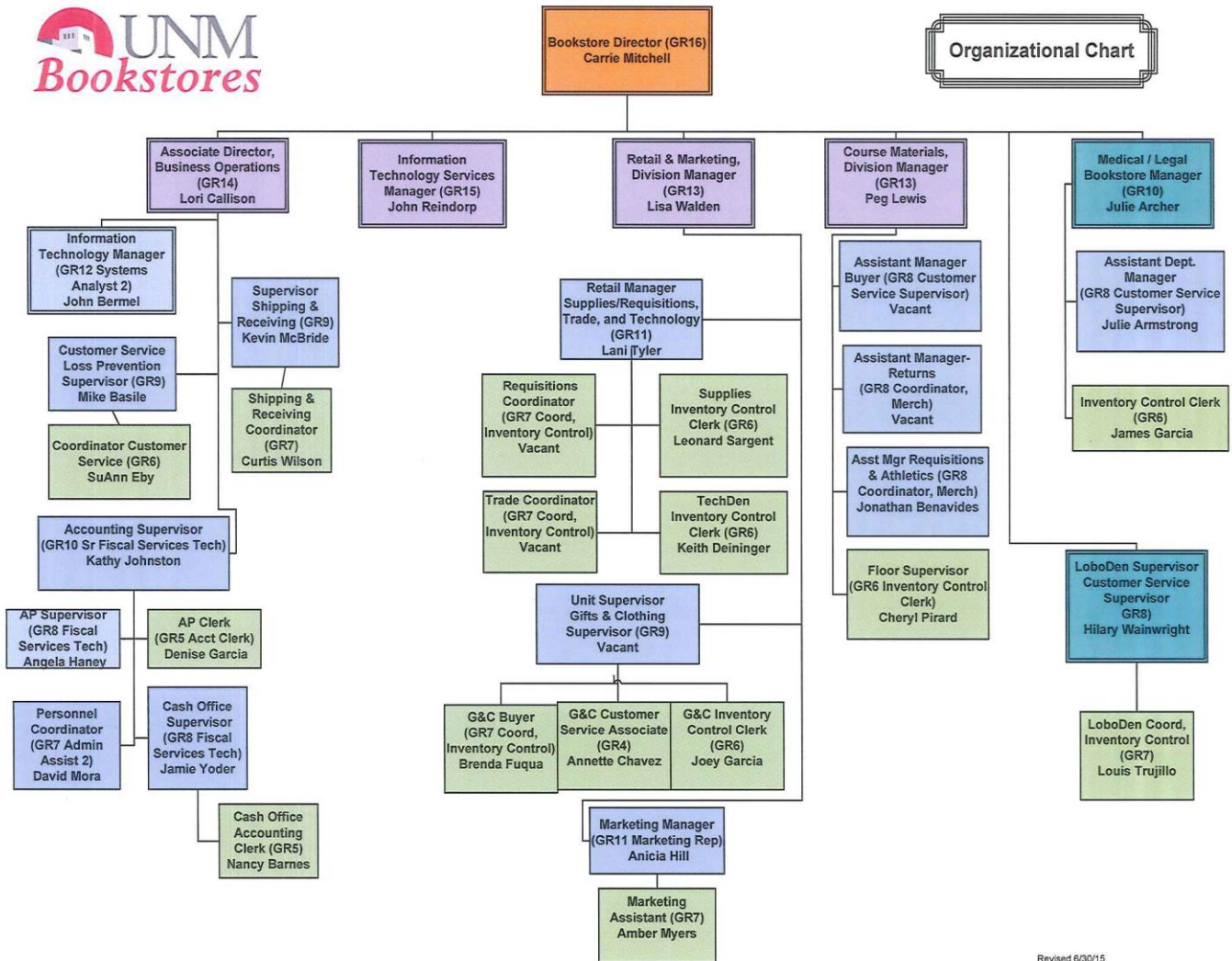
Mission

As the official bookstore serving the University of New Mexico, we will provide customers the educational products, services, and resources to support our campus community. In addition, we will provide value enhancing services that support our campus community and strive to be an indispensable campus partner.

Vision

UNM Bookstores are a forward thinking, effective campus partner, advancing the University's mission.

Organizational Chart



Revised 6/30/15

2014-2015 Annual Report**Table of Contents**

I.	Executive Summary	12
II.	Overview	13
III.	Accomplishments	14
IV.	Current Projects	15
V.	Future Plans	15
VI.	Personnel/Staffing Information	15

I. EXECUTIVE SUMMARY

Fiscal Year 2014-2015 saw many challenges and achievements at the Bookstores; Main, Medical Legal, and Lobo Den stores at WisePies Arena. All aspects of Course Materials continued to be prominent and directed much of this year's focus for the Bookstores. We continued to develop more services and partnerships to support our campus community.

The Bookstores are a totally self-supporting operation within ISS. Our budget includes a partnership with the Athletic Department to split 50-50 the revenues generated at the Lobo Den, a 100% funding of an ISS IT management position with all remaining revenue going into ISS funds. The Bookstores missed their budgeted contribution to ISS by \$158,000. Our sales were down 6% and we decreased our expenses by 5%. The critical positions of Textbook Manager and Assistant Manager were vacant most of the year. With the increase of online competition in the course materials market and a decline in enrollment, our textbook sales decreased. We also saw a decrease in special orders placed by campus department in our technology department.

The affordability of course materials is a critical issue for our campus, thus for the Bookstores. As with most of the past five years, the Bookstores were able to drop the average price that students pay for course materials at our stores. In conjunction with the savings, a comparison tool was loaded onto the Bookstore's website, to assist students in finding more affordable course materials. Students get on the Bookstore's website to see what course materials are required for their courses and then plug that information into the comparison tool. They are able to see our prices and those of Amazon, Alibris, and others. They make the purchase from their choice. The Bookstore prices are very competitive and are selected more than 73% of the time by UNM students.

The Bookstores continue to have employees involved on campus and reaching out forming new connections to service. Our technology store partnered with IT to offer the "Brain Bar." This is a service to students, faculty, and staff seeking help with technology. In the coming year we are expanding that partnership. We assist departments on campus by providing sales support to all author events. During new student orientation, our entire staff is involved in educating incoming freshmen on required course materials for their classes. We also take part in new faculty orientation to educate instructors on researching course materials, acquiring instructor copies and the many services such as buyback the bookstores provide students and faculty. Two pilot programs for the Inclusive Access model of course materials were developed during the Spring 2015 semester.

The Bookstore Business Division team continues to handle the accounting for the golf courses, as well as our clothing and gift manager overseeing the pro-shops product buying. Focus never changed from supporting the University students, staff, and faculty.

The Bookstore continues to participate in the industry through involvement with regional associations and national associations. We have two employees who are board members of Rocky Mountain Skyline Bookstore Association, and several employees involved on national committees advising accounting procedures, course material affordability issues, and leadership.

II. OVERVIEW

The Bookstores' net sales were \$14,329,800 for Fiscal Year 2014-2015. This is a decrease of 6% from budget. There was an overall reduction in operating expenses of 5%. With the decrease in sales a concentrated effort was made save on labor. The labor savings were \$131,866 under budget and \$193,490 under prior year. In an effort to resize our staff and bring our labor spending more in line with our sales, we did not to fill one of the Assistant Managers in textbooks, the Business Division Manager, and Clothing Department Supervisor. We were able to contribute \$192,000 to ISS as well as fund an ISS position of \$120,000, and \$45,166 to Athletics for a total contribution of \$369,838.

Main Store

- Course materials had a decrease in sales of 4%, in-line with the college store industry. Our textbook rental program was weak for the year without a manager in the department. The savings on rental textbooks is significant and gave us the ability to pass the savings on to our students. The “compare tool” was added to our website. This gives our students the ability to find out how our prices compare to other online retailers. Our win rate is over 73%, which means more than 73% of shoppers are choosing us. We started the outreach to faculty to develop the Inclusive Access model with two pilots to take place in Summer. We were able to negotiate significant savings for both courses' digital materials that could save students up to 47%. This would also ensure that every student in these courses had the digital course materials on the first day of class. This is a critical factor that faculty struggle with each semester. Online orders, with pick up in the store, continue to grow.
- Supply Department saw a small 1% decrease in sales. They continue to sell a majority of supplies to campus departments at a 30% discount and offer free delivery. This is going to be a focus of a large marketing campaign in Fiscal Year 15-16.
- General Book Department supported over 30 book events on campus last year. Our book department staff take and set up anywhere and everywhere the campus needed us to sell. The number of events for the upcoming year will increase through a new outreach program developed by the new events coordinator. We continue to offer general books at a 20% discount for all faculty, staff, and students.
- Clothing Department sales were down by 8%. Several things influenced this decrease: lackluster promotions, selection of merchandise not up to the level of expectations, and major sports having poor seasons. We have a new retail manager overseeing the area for FY15-16 and expect to see increases in performance of sales.
- Technology Department saw a decrease in sales due to a large reduction in special orders, and a lack luster Apple product line.

Medical Legal Store

- Continues to serve all North Campus constituencies and the hospital well, but sales are decreasing. Outreach on campus was low due to the store manager spending 3 days a week at the main store helping the textbook department.

Lobo Den Store

- A decrease in sales of 9% to budget was due to many factors. Football had a very poor season in attendance which reflects in the sales at the stadium, basketball did not win the tournament, thus no championship product and we were restricted from selling senior t-shirts.
- The Pit location is open year round, the football shops open during football games, and one shop is open for many men's soccer games. We set up to sell at some home baseball games. The staff works to support as many athletic events as possible.

Golf Course Operations

- Lori Callison continues to lead the financial reporting.
- Carrie Mitchell and Hilary Wainright continue to oversee the retail product for the both courses.
- Kathy Johnson has A/P responsibilities.
- John Reindorp continues to assist with the Crescent system.

III. ACCOMPLISHMENTS

- Introduced a new comparison tool online for students to assist with purchasing textbooks.
- Introduced Electronic Shelf Labels for textbook department at main store . This reduced shelving spaces from 4,700 to 2,672 and decrease labor hours by over 30%. Replaced printed shelf card tags with electronic tags. The electronic tags are integrated with our POS system and automatically update pertinent information on the tag. This eliminated printing over 10,000 shelf tags each semester.
- Introduced the Brain Bar at the main store Tech Den department.
- Introduced Apple Faculty Staff Event to campus. Only select Apple resellers are invited to participate. We qualified and sold \$54,000 for the day.
- Introduced a technology trade in program, for customers to bring in old devices and receive credit towards new purchases.
- Developed Inclusive Access program for digital course materials. All students have the course material on the first day of classes and at significantly reduced prices.
- Achieved a 7.0% reduction in labor expenses over prior years' expenses.
- Developed departmental/location financial reporting to increase control over budgets.
- Trained department managers to create individual budgets by departments to increase awareness and accountability for each area in all stores
- Moved server to IT in October.
- Remodeled lobby bathrooms.
- Remodeled bookstore lobby.

- Decreased warehouse space by over 75%. This will allow us to move out of the current building.
- Developed marketing program with UNM Admissions Office to inform new accepted high school students of the technology savings and products available to them at the Tech Den department.

IV. CURRENT PROJECTS

- Work to achieve PCI compliance.
- Implementing mobile sales solutions at sporting events, book events, and increase customer service to bust lines at registers.
- Implementing Inclusive Access pilots for Spanish 101 and Management 310.
- Implementing Customer Service training for all employees in an effort to change our culture for increased service and create great experiences for each customer.
- Ecommerce team working on functionality, product selection, marketing, and processes needed to grow our online business.
- Student task force developing dynamic orientation and training program for all new student employees to include video, written, and verbal instruction.
- Creating a partnership with UNM IT to provide Same Day Computers for departments who need to get an imaged computer today.
- Creating new outreach program to increase book event sales on campus.
- Developing customer loyalty plan.
- Developing store maintenance and custodial calendar.
- Athletic Textbook Rental Program.

V. FUTURE PLANS

- Apple Purchases by UNM Departments to flow through Bookstore to increase UNM commissions
- Expand Ecommerce
- Faculty Course Material Website Coordination
- New POS software
- Expand Athletic Partnership
- Develop Marketing Program to Alumni

VI. PERSONNEL/STAFFING INFORMATION

Hired in 2015:

Denise Garcia – Accounting Clerk - 10/2014 (formerly Accountant 1 position)

Rachel Humpton – Coordinator of Inventory Control General Books – 7/2014
Stephanie Ulrich – Coordinator of Inventory Control Trade 7/2014
Peg Lewis hired – Course Materials Division Manager – 1/2015
Cheryl Pirard hired – Inventory Control Clerk - 3/2015
David Mora hired – Admin Assistant 2 – 3/2015

Resigned in 2015:

Tricia Clessi – Coordinator Inventory Control General Books 7/2014
David Mora – Coordinator Inventory Control Textbook – 9/2014
Stephen Machson – Admin Assistant 2 – 1/2015
Candace Green – Customer Service Supervisor Textbooks 4/2015
Stephanie Ulrich – Coordinator Inventory Control Supplies – 7/2015
David Salazar – Unit Supervisor 1 Gift & Clothing– 5/2015

Appendix B



FY 2014-2015 Annual Report

UNM Dining & Food Services

Submitted by:

Timothy Backes, Associate Director

<http://iss.unm.edu>

Mission and Vision

Mission

The University of New Mexico’s Dining & Food Services Department is committed to providing an exceptional dining environment while ensuring quality food that addresses diverse nutritional and cultural needs of students, faculty, staff, conference guests and the community.

Vision

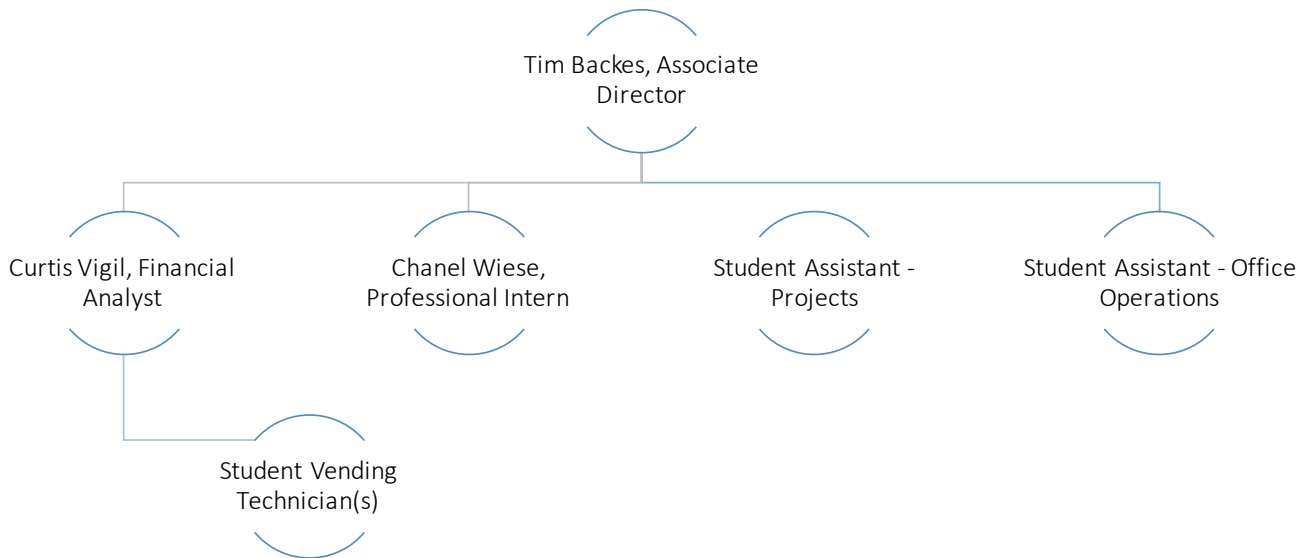
UNM Dining & Food Services is an inclusive and creative food service program that supports academic success and builds a community environment within the University. We are known for offering diverse food options of high quality, while utilizing locally grown and produced products. We strive to offer the finest dining experience across higher education, which will enable us to remain a premier account within the collegiate food service industry. Whether our customers prefer our various retail outlets in the Student Union Building or across campus, the La Posada Dining Hall, Catering or Vending Services, we leave them with a positive experience that is unforgettable.

Organizational Chart

UNM Food Services

a division of UNM Institutional Support Services

Departmental Organization Chart as of 10/1/2015



2014-2015 Annual Report**Table of Contents**

I.	Executive Summary	20
II.	Past Accomplishments	20
III.	Current Projects	21
IV.	Future Plans	21
V.	Department Staffing Information	22

I. EXECUTIVE SUMMARY

UNM Dining & Food Services worked to further refine the department's identity and has grown into an independent and established department within the ISS portfolio.

Managing the contract between the University and Food Service Contractor is one of the department's chief functions. For that reason, the RFP process for selecting a new contractor has been a highlight of the past year for us. There were three responses to the RFP from the best Higher Education Food Service Contractors in the world. Each were analyzed for financial return to the University, experience, creativity, and their overall Proposed Plan and Implementation. Chartwells was awarded the new Food Service contract for the University by the committee comprised of student and staff representatives from our identified stakeholder groups.

The department's primary revenue source remains to be commissions received from Chartwells. We rely on cost management in order to remain profitable. At the conclusion of FY15, our department utilized a planned use of reserves in order to allocate funds to La Posada Dining Hall enhancements required for the development of an unlimited access, 24/7 Dining Club environment. We have agreed to receive commissions from Chartwells that parallel to seasonal sales fluctuations which gives us a variance in comparison from year-to-year, but we are able to mitigate pressure from a variable commission structure since our costs are also variable with respect to sales and activity in the dining and food services operations.

II. PAST ACCOMPLISHMENTS

When the University and Chartwells came to an agreement to offer an unlimited access, 24/7 concept at the La Posada Dining Hall, it was also determined that changes to La Posada would be necessary to complete the Dining Club community space that we envisioned. Over the Christmas Break, we completed Phase 1 of a renovation project in the building. This included changes to the server space such as a rebrand of the smoothie concept to Red Mango, a rebrand of the pizza station to Papa John's Pizza, and cosmetic alterations that refreshed the space. Additionally, the dining area was enhanced by the introduction of a "Captain's Table" with built-in plugs for students to charge electronic devices. Upgrades to the internet were also made in order to create a positive "study & dine" experience 24 hours a day, 7 days a week.

The Dining Club Program was also expanded in order to respond to student needs for to-go options within their unlimited access plan. The Saggio's Express location in the SRC was renovated and changed to The Café, run by Chartwells. Anyone with a Dining Club meal plan can get pizza, pasta, or salad meals for a meal swipe on their way to class or work. This concept was so popular, that it was rolled out to the Student Union Building, where the new Lobo-To-Go location offers to-go meals for members of the Dining Club in a central location on campus.

In Spring 2015, it was determined that the Student Union Building sandwich concept and Italian/pizza concepts were not meeting the needs of the population. The UNM Dining & Food

Services department, Chartwells team, and the Retail & Marketing Committee of the Student Union Building Board determined that it was time to look for alternatives. Upon the award of the Food Service Contract to Chartwells, plans to introduce Subway and WisePies into the retail mix at the Student Union Building were approved, per Chartwells' recommendation in their proposal. Both buildout projects were completed successfully with a quick turnaround over summer break, and opened on time before the new academic year started.

III. CURRENT PROJECTS

The Dining & Food Services department is currently working in concert with Chartwells on the development of the new Food Service Contract. We strongly believe that collaborating with Chartwells from the very beginning of the process will result in a document that thoroughly represents both party's interests. Furthermore, we seek to create a partnership that puts UNM and Chartwells on the same side with incentives and goals that are congruous.

We are planning capital improvements to the Food Services on campus in order to provide convenient high-quality service to our customers. We are utilizing the services of UNM Planning, Design & Construction as we prepare for a La Posada Overhaul/Renovation, food service to HSC on North Campus, and a Boxcar to-go concept in the Engineering Neighborhood.

We are also in the process of transitioning Catering sales, booking, and billing to a newly created Chartwells Catering Manager. A similar process was completed with Meal Plan sales at the beginning of the Fall Semester. Chartwells and UNM Dining & Food Services agree that Chartwells should be able to have the autonomy to influence their own profits by managing the sales relationships from beginning to end in both the Catering and Meal Plan spaces.

IV. FUTURE PLANS

UNM Dining & Food Services will continue to invest in capital improvements that enhance the dining program for all of our stakeholders and customers on campus. We are planning on refreshes for retail locations in the Student Union Building that were not completed over the last year. We also plan to make improvements to the UNM University Club, Championship Golf Course Pavilion, and see our major renovations at La Posada Dining Hall come to fruition.

We will continue to build on integration into the ISS portfolio by striving to strengthen relationships with Housing, Conference Services, and other departments on campus that we work closely with in providing our services. The department will complete an analysis of satellite locations on the main campus and the North Campus to ensure that food service hours and offerings are consistent with the needs of the campus community.

The University of New Mexico was selected to host the 2017 Southern Regional Conference for the National Association of College and University Food Services (NACUFS). Our department will be working on the production of the conference with assistance from Chartwells, UNM Events & Planning, the Santa Fe Visitor, and Convention Bureau and National NACUFS staff to make the conference a success and highlight the components that make us a signature collegiate food service account.

V. DEPARTMENT STAFFING INFORMATION

The Dining & Food Services Department is comprised of three Full Time Staff Members and four Student positions. Both our Professional Intern and Business Manager were hired in FY15, in February and June respectively. The Business Manager, in addition to financial and personnel duties outlined in the job description, also manages the Student Vending Technicians that oversee the Pepsi and Sandia (food) vending machines and call in refill orders. The other two students assist with projects and office operations.

Appendix C



FY 2014-2015 Annual Report

Faculty & Staff Club

Submitted by:

Amanda Gerard, Manager

<https://fsca.unm.edu>

Mission and Vision

The Faculty & Staff Club strives to deliver outstanding products, services and experiences for our members, the UNM community, and guests. We offer delicious food and beverage at a great value and enhance social wellness in our work environment by providing a welcoming and comfortable atmosphere to relax, dine, and entertain.

Organizational Chart

UNM Faculty and Staff Club

a division of UNM Institutional Support Services

Departmental Organization
Chart as of 06/30/2015



2014-2015 Annual Report**Table of Contents**

I.	Executive Summary	26
II.	Accomplishments/Significant Developments FY14-15	26
III.	Current Projects	26
IV.	Future Plans	26

I. EXECUTIVE SUMMARY

The Faculty & Staff Club continues to make improvements through amenities, services, and processes. The Club operated with an \$86,200 budget and began the year with \$55,300 in reserves and ended the fiscal year with \$54,238 in reserves. The Faculty & Staff Club began to diversify its revenue streams to include sources other than member dues specifically focusing on increasing rentals for private events. The Club has also added new products as well as improved the current offerings.

II. ACCOMPLISHMENTS/SIGNIFICANT DEVELOPMENTS FY14-15

The Club has been somewhat utilized by the campus community for events, but had not been a top venue choice for receptions and special events. We have seen a strong increase of rentals in the past year. This area has proven to be a great potential revenue stream for the club and an attractive venue choice for campus. The Club is promoted at information and wellness fairs on campus, via social media, and bridal shows to inform potential clients of the diverse possibilities for renting the facility.

The club had not been updated since opening in 2005 and much of the furniture and was in poor condition. We have updated the dining furniture and conference furniture to add to the seating capacity as well as improve the aesthetic for promotion of the venue.

Quality of food and beverage has been improved by working closely with Chartwells to come up with products that are attractive to our members and guests. We have made it a priority to provide delicious, quick meals at a great value that are unique to our venue. We have also added products to our weekly happy hours. We now offer cocktails for purchase as well as complimentary hors d'oeuvres. We have a new wine list with varieties chosen to elevate the quality of beverage offered at the Club.

III. CURRENT PROJECTS

The Club is currently in a rebranding and transitional phase. The name has been very recently changed to the University Club. The buffet has been expanded to five days a week as opposed to the previous three. Daily sales and guests per day have increased dramatically. A tiered pricing structure has been implemented to encourage new memberships.

IV. FUTURE PLANS

Our future initiatives are to continue to grow our membership base through implementation of strategic incentives as well as maintaining an active and vibrant environment for members. We will continue to have regular member events as well as recruiting events.

Chartwells will be doing a construction project in the kitchen area to remodel the space into a more efficient and attractive serving area. This is another aesthetic improvement that will help event sales as well as improve the level of service that we can provide to members and guests.

Lastly, we will continue to drive event revenues with focus on early week and weekend events to increase sales during our off peak days and times.

Appendix D



FY 2014-2015 Annual Report

UNM Golf Courses

Submitted by:

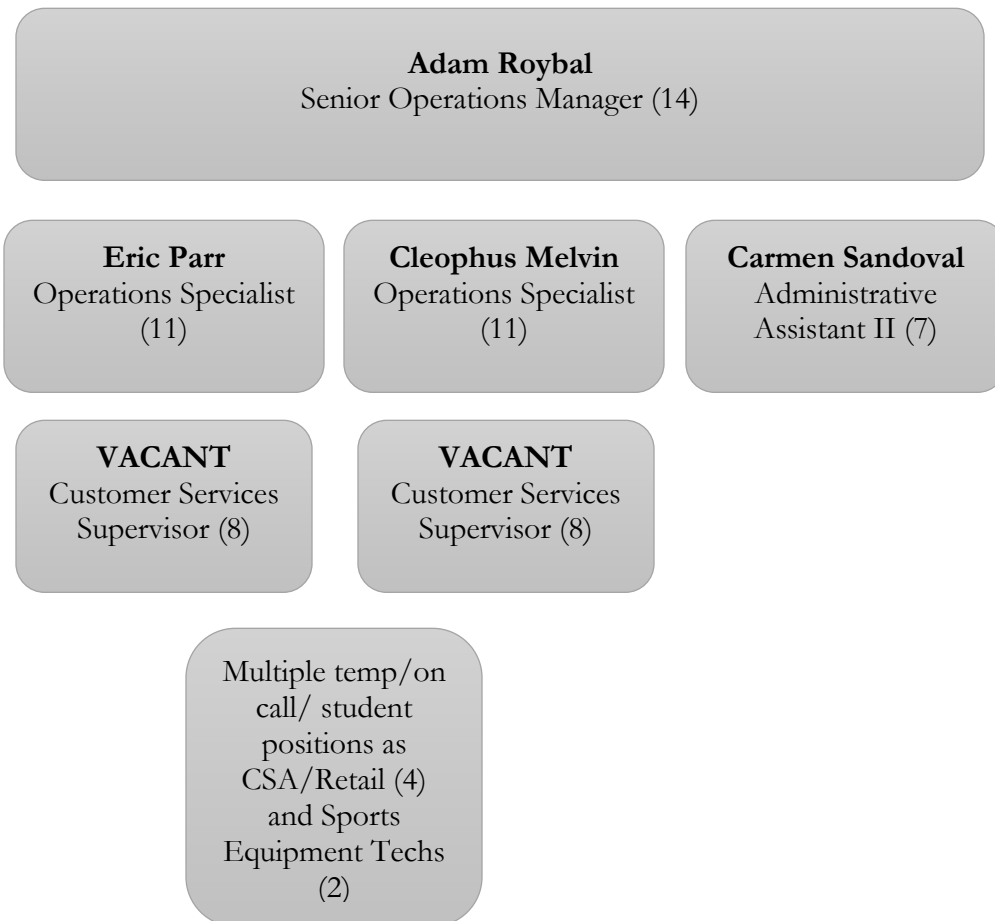
Adam Roybal, Sr. Operations Manager/PGA General Manager B-13

<https://iss.unm.edu/GolfCourse>

Mission and Vision

The UNM Golf Courses are essential University assets that embody ideals consistent with its standards of excellence. Maintain the golf courses at a high quality, championship level throughout every aspect of the golf operation. Manage with a commitment to service, emphasizing a welcoming environment. Support intercollegiate golf programs consistent with the standards of the University. Support and enhance the variety of recreational opportunities offered to UNM Students/Faculty/Staff, Alumni, University guests and public consumers.

Organizational Chart



2014-2015 Annual Report

Table of Contents

I.	Executive Summary	31
II.	Overview	31
III.	Accomplishments	31
IV.	Current Projects	32
V.	Future Plans/Goals FY 14-15	32
VI.	Department Staffing	32

I. EXECUTIVE SUMMARY

The Championship Course continues to be recognized as one of the premier collegiate courses in the Nation. National golf and travel publications continue to recognize the Championship Course as one of the best places to play in America. Golfweek Magazine ranked the Championship Course the #1 golf course to play in Albuquerque. 4,200 tournament rounds were hosted by the Championship Course including two intercollegiate tournaments and a national junior tournament. Additionally, the Championship Course hosted various USGA, PGA, and Junior tournaments. The Championship Course became the home of the First Tee of Greater Albuquerque to increase junior participants and continue to help the growth of the game. The Championship Course continues to host numerous charitable benefit tournaments as well as provide a venue for many UNM Departmental fund raising tournaments. The UNM golf courses continue to support and enhance the variety of recreational opportunities offered to UNM Students/Faculty/Staff, Alumni, University guests, and public consumers.

II. OVERVIEW

Golf rounds played at the Championship Course totaled 31,555 in FY14, a decrease of 14% from the previous year. Golf rounds played at the North Course totaled 29,846 a 34% increase from previous year. Championship Course experienced a downward trend in rounds played while North Course experienced significant increase in rounds played. Furthermore, green fee revenues at the Championship Course decreased 8.5% over the previous year while the North Course had an increase of 50% for the same reporting period. Customer retention due to competition and a recovering discretionary spending economy at championship course decreased market share contributing to these figures. North Course significantly bounced back from the closure in 2014 resulting in increased rounds played and increased revenue. On the expense side, the Championship Course increased by 1.1% and the North Course increased 3.2% from the previous year. Factors contributing to the increases are HVAC replacement in the Pavilion, John Gaw Meem structure clean up/fence, trail repair from storm damage, athletic facility repair, turbine well failure, and installations for PCI compliance.

III. ACCOMPLISHMENTS

Improving marketing and promotion efforts both golf courses are utilizing Institutional Support Services (ISS) entities to expand and provide growth within the institution. Participation includes organizations such as the NM Golf Tourism Alliance, Golf on the Santa Fe Trail, and strong relationships with the ACVB, State Department of Tourism, and the Sun Country Golf Associations. Our website, www.unmgolf.com, provides a marketing tool for the operation to increase awareness for the golf courses. The UNM golf courses are utilizing social media with Facebook and Twitter. Continue to develop and maintain relationships with the North Neighborhood Associations and Bernalillo County. Continue to support both Athletic golf teams at

the Championship course. Managers are also active participants in the Safety and Risk Services Loss Prevention and Control Committee.

IV. CURRENT PROJECTS

Working with the First Tee of Greater Albuquerque to extend a multi-year agreement to provide a long term home at the Championship Course.

V. FUTURE PLANS/GOALS FY 14-15

The North Course Phase II with Bernalillo County that includes reclaimed water from the Ford Utilities Chiller Plant to the reservoir. The Championship Course and North Course continue to support the vision and mission of the University. The golf courses will continue to focus on ISS work plan goals. The golf courses cart fleet lease expires in 2016, will be looking to secure another lease suitable for the operation.

VI. DEPARTMENT STAFFING

Staff Appointments:

Eric Parr, Operations Specialist 6/15

Staff Separations:

Autumn Gilliam, Operations Specialist 6/15

Appendix E



FY 2014-2015 Annual Report

New Mexico PBS
KNME-DT KNMD-DT

Submitted by:

Franz Joachim, General Manager & CEO

www.newmexicopbs.org

Mission and Vision

Mission

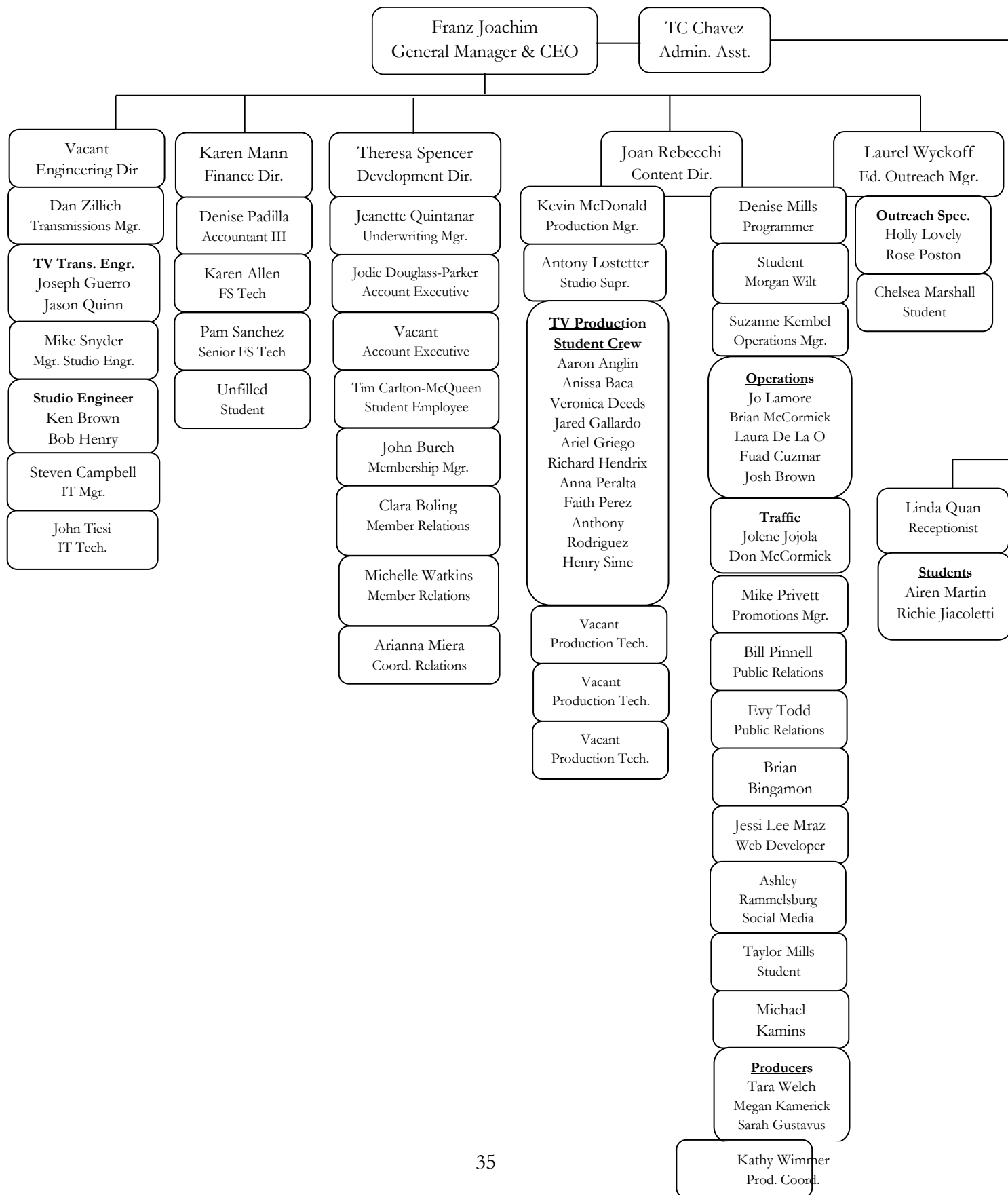
New Mexico PBS' Mission is to inform, engage, and connect New Mexico's diverse communities, reflecting their interests and needs through quality programming, services, and on-line content that can be accessed anytime, anywhere.

Vision

New Mexico PBS will invest its resources to enrich the lives of viewers through engaging content and services that expand horizons, stimulate local culture, foster public dialogue, encourage civic involvement, and advance the quality of life for all.



Organizational Chart



2014-2015 Annual Report

Table of Contents

I.	Executive Summary	37
II.	Overview	39
III.	Accomplishments	40
IV.	Current Projects	45
V.	Future Plans	46

I. EXECUTIVE SUMMARY

New Mexico PBS began Fiscal Year 2014-2015 in solid positions with respect to finances, standing in the community, and standing nationally as a PBS affiliate.

Key accomplishments during FY 15 included continued growth in membership with a concurrent growth in associated revenues. Overall viewership remains steady while similar television markets around the nation continue to see weakness. Revenues from ancillary activities such as program distribution and video production services surpassed key benchmarks. Corporate Underwriting sales that have suffered significant downward movement since the beginning of the recession in 2009 appear to have stabilized, but with no signs of improvement. Ancillary revenue from leasing space at translator sites is improving.

New Mexico PBS channel 5.1 KNME continues to enjoy strong ratings, indicating a dedicated following. Aggregate ratings for prime time viewing as well as ratings for individual programs regularly appear in the top five nationally. Day time ratings, specifically around our children's block, are competitive with the commercial offerings sharing the same day parts often outperforming all competition. We have picked up Nielsen ratings services for all four streams, KNME 5.1, KNME 5.2, KNMD 9.1, and KNMD 9.2. Early indications based on a small data sample show low interest in KNME 5.2 V-Me, supporting the anecdotal evidence we have been relying on since its inception in 2007. Early sampling show significant viewership on both KNMD streams.

Local impact enjoys continued success and increased relevance. With the launch of *Colores!* in FY 13, we re-established our claim to both the brand and the genre. There is no other continuous and comprehensive coverage of the New Mexico Arts and culture beat. And in partnership with other PBS stations around the country we distribute these stories of the New Mexico Arts scene to a national audience. Nielsen ratings analysis indicated that viewership on the Saturday afternoon broadcast of *Colores!* was stronger than the premiere broadcast Friday nights at 9pm. This summer we moved the premiere episode of *Colores!* to Saturday afternoons. Early results show that we have stabilized viewership indicating that we successfully established this brand.

Similarly, we continue our partnership with the Corporation for Public Broadcasting's American Graduate initiative leveraging the relationship to highlight the issues surrounding flagging high school graduation rates around the nation through the lens of the solutions we are finding at the local level. The United Way of Central New Mexico's Mission: Graduate initiative recognized the strength and value of the structure we created around American Graduate and has incorporated that structure into their program. New Mexico PBS and the American Graduate initiative are fundamental to the Mission: Graduate structure as a key partner and media leader.

New Mexico in Focus remains the only state wide television program devoted to New Mexico public affairs and the analysis of local issues. Our consistent high level of journalistic quality and integrity has lead to partnerships with UNM's New Mexico News Port, New Mexico In Depth, and FollowTheMoney.org. Through additional partnerships with our sister stations, KENW-TV

Portales, KRWG-TV Las Cruces, KUNM-FM, and KANW-FM we are in a unique position to reach every citizen of the state with issues of important, relevant information, entertaining, enlightening, educational content that improves our lives and helps us become better citizens. This was most apparent in our collaboration to make sure that every citizen in New Mexico had access to a live feed of Governor Martinez 2015 State of the State address. Providing a live feed of the address to each Public television station and Public Radio station as well as providing a live stream on the internet ensured that every citizen of the state had the opportunity to see the governor's address. This same ethos carries through our entire commitment to public affairs, to make sure vital information is available to every citizen of New Mexico.

II. OVERVIEW

New Mexico PBS exists as an umbrella brand for two broadcast entities, KNME-TV and KNMD-TV. KNME-TV was licensed to broadcast as a Public Television station in 1958. The University of New Mexico and the Albuquerque Public School District signed a Joint Powers Agreement that defines the responsibilities of each institution to the construction and operation of KNME-TV. In 2004 KNMD-DT was licensed solely to the University of New Mexico to operate as a Public Television Station. KNME and KNMD, as well as Westlink Satellite Distribution Services, NMPBS Production Services, www.NewMexicoPBS.org and NMPBS LearningMedia operate as entities of New Mexico PBS.

NM PBS provides New Mexicans with the knowledge they need to make informed decisions; we convene community dialogue and engage audiences to share their stories. We help students and teachers thrive in 21st century classrooms and take people of all ages on journeys and exploration, exposing them to new people, places, and ideas. We are leaders in using emerging technologies to bring benefits in the digital world and inspire community engagement. We act on the belief that place and community matter.

NM PBS KNME channel 5.1 is one of the most watched public television stations in the country reaching almost 700,000 households each week with over 20,000 members in New Mexico. In addition to such standards as Nature, Nova, and Masterpiece Theatre, KNME provides over 70 hours a week of educational and entertaining children's programming. By some measures that makes us the largest provider of early learning resources in the state. KNME channel 5.2 broadcasts Spanish language content specifically programmed for the Spanish speaking audience that yearns for more enlightening and educational fare.

NM PBS Channel 9 reaches approximately 360,000 households with an alternative schedule of PBS programming aimed at the educated voter. Our PBS World service on channel 9.1 provides news from around the world and public affairs programming designed to inform and inspire. The Create service on channel 9.2 is an aggregation of all the great how-to, cooking, and travel programs that made PBS the leader of that genre.

Westlink Satellite Distribution Services provides a low-cost alternative distribution point for those seeking the viewership among the nations other PBS stations. Westlink provides over 20 hours of high quality programming to every station in the PBS system every week.

NMPBS Production Services honors the congressional mandate that PBS stations use their facilities to mitigate tax payer involvement in supporting station operational costs. By identifying niche markets in video production, not otherwise served by the New Mexico film and television production community NMPBS Production Services generates significant revenues that support the mission and vision of New Mexico PBS.

NewMexicoPBS.org provides users with a place to interact, learn, and connect with others and has over 35,000 page views per month. NM PBS has extensive partnerships throughout the community.

These partnerships include the K-12 community, higher education, dozens of community service organizations, and more.

NMPBS LearningMedia leverages the best of local and national educational content, providing learning modules gleaned from the best of PBS and NMPBS programs along with lesson plans ready to be used in classrooms around the world. NMPBS LearningMedia is an invaluable educational resource used by over 5,000 teachers statewide.

Our broad reach on-air, online, and on the ground comprise an extensive educational and community service organization in New Mexico. For more than 56 years, New Mexico PBS has been a leader in public television with a history of innovative services connecting the people of New Mexico.

III. ACCOMPLISHMENTS

- NMPBS is one of the most watched public television stations in the country reaching almost 700,000 households each week. NMPBS continues to average in the top ten most viewed stations at least three times a week. The Wednesday night science block which includes NOVA and NATURE are very popular among our viewers as well as MASTERPIECE, ANTIQUES ROADSHOW, and FRONTLINE.
- Last year, NMPBS launched a new Enhanced Schedule Page on our web site which has 6,600 webpage views. This section allows users to click on videos and photos in the program listings section and receive expanded information. The Support section of the website underwent a reorganization/redesign and the cumulative total of pageviews for those pages is 10,253. NMPBS has also had 122,948 pageviews on the streaming PBS Video Portal and 49,229 YouTube video views. *New Mexico in Focus* had 388,326 YouTube video views.
- Our social media sites saw growth in the past year. NMPBS Facebook fans have grown 39%, and our Twitter following has grown 35%. On Facebook one of our most popular organic posts highlights Albuquerque Fire Department and Sandia National Labs Emergency Response team training for vertical rescue on our towers here at NMPBS, it received 38 likes, comments, and shares. Along with the growth we saw on Facebook and Twitter, our Instagram following has increased 30% in 2015.
- NMPBS signature weekly public affairs show *New Mexico in Focus* remains the only state wide television program devoted to New Mexico public affairs and analyses of local issues. Some notable interviews included *Games of Thrones* author and Santa Fe resident George R.R. Martin, Mayor Berry on the APD police crises, Paul Barnes, co-producer of Ken Burns' *The Roosevelts*, U.S. Representative Michelle Lujan Grisham, and Bernalillo County DA Kari Brandenburg. NMPBS also continued with expanded legislative coverage including interviews at the Roundhouse with legislative leaders from both the House and Senate. *New Mexico in Focus* covered a wide range of topics including, Kit Carson Park naming controversy, APS school board election, homelessness, teacher evaluation and testing, and more.

- In collaboration with the *PBS NewsHour*, NMPBS produced content for local and national distribution on the Santa Clara Pueblo flooding and environmental damage, fracking in New Mexico, and the immigration crisis and its effect on Artesia.
- NMPBS partnered with KENW, KRWG, KUNM, and KANW to provide statewide election coverage. All the stations simulcast the debates for CD1, CD2, CD3, and the Senatorial debate. The debates aired from September 2014 through October 2014. NMPBS also produced one-on-one interviews with the candidates who air on *New Mexico in Focus*.
- *COLORES!* continued as a weekly local and national art series on NMPBS. The series features local and national stories about film, visual and performing arts, theater, photography, literature, painting, sculpture, poetry, and dance. *COLORES!* provides an in-depth look at the inspiration, challenges, and processes of a wide range of artists. *COLORES!* is presented through a collaboration between NMPBS and the Public Television Major Market Group (MMG), a public television affinity group. Episodes included interviews with Painter Nicolai Fechin, Tewa artist Jason Garcia, Best-selling author Hampton Sides, Santa Clara Pueblo artist Helen Harden, Filmmaker Chris Eyre, world-renowned violinist Midori, and more.
- NMPBS continued the monthly series *Public Square*. This one-hour program gives community members the opportunity to be center stage in discussions related vulnerable children with community leaders. Topics covered included: Linking communities to schools and family friendly workplace. NMPBS partnered with community organizations to facilitate community conversations focused on the personal stories of families and youth, drawing out themes that support dropout prevention, including attendance. These conversations culminated with a Rural Education Town Hall in May 2015 as part of the PUBLIC SQUARE series.
- NMPBS produced a special one-hour documentary called *Painting Albuquerque* which aired in June 2015. This documentary is devoted to the celebrating the culturally diverse painters who over the last 100 years have contributed to Albuquerque's cultural identify and artistic heritage. NMPBS has also begun producing another documentary called *NM Masterpieces* which will air in December 2015. *NM Masterpieces* celebrates the great paintings, sculptures, architecture, photographs, films, and other artworks that express the very fabric of New Mexico's creative spirit.
- Fiscal Year 2014-2015 was very successful for our uplink business. Some of the clients we served included FOX, MSNBC, CNN, Al Jazeera, and Telemundo. We connected dozens of experts and pundits to these commercial outlets in both Albuquerque and Santa Fe. Prominent guests including former New Mexico Governors Bill Richardson and Gary Johnson, plus former CIA operative Valerie Plame, as well as retired NTSB Investigator Dr. Alan Diehl.
- NMPBS works with outside organization on production contract jobs and grants. Some of the highlights include a seven minute video for the Physical Plant Department at UNM, which won the APPA Award for Excellence in 2014. We helped the President and other top Administrators at UNM hold a livestream event that served as the "State of the University"

for students, faculty, and staff across all UNM's campuses. We also helped to land several grants that allowed us to do local tie-in program to national PBS shows, such as the "Finding your Roots" segment we did on our weekly Public Affairs show, *New Mexico in Focus*.

- As in years past, we continued to train and mentor the broadcast production professionals of the future. First and foremost, there is the lab for C&J 360 that continues to meet in our studio. This Communication and Journalism class teaches students the basics of production, from reporting, to shooting, and editing news packages, as well as the basics of studio production: from studio cameras, to technical directing, and running an audio board.
- NMPBS developed an Attendance Awareness campaign as part of the United Way Mission Graduate initiative and the Corporation for Public Broadcasting American Graduate project. The slogan for this campaign is "Everyday Matters." We are running digital billboards and bus shelter panels, Spanish and English radio spots, and spots on Comcast utilizing this message.
- During 2015 we have provided approximately 1,000 hours of satellite uplink service to PBS stations during the fiscal year, and reached approximately 135% of our original goal. NMPBS has also renewed the distribution agreement with our largest client, Democracy Now! for the next fiscal year.
- We partnered with UNM Continuing Education for the NMPBS Kids Summer Learning Camp. NMPBS trained instructors to use PBS Kids programming for camps that provided hands-on activities for children while building their math and reading skills. In addition, NMPBS held Sci Girls camps based on the popular PBS program to investigate STEM activities.
- Over 5,000 people attended the *Antiques Roadshow* filming in Albuquerque in July 2014. The biggest find was a \$250,000 painting. The three Albuquerque episodes aired on September 28th, October 5th, and October 12th, 2015. NMPBS is one of the most watched *Antiques Roadshow* stations in the nation.
- NMPBS held a screening and panel discussion for Ken Burns' *The Roosevelts* in September 2014 at the Lensic Performing Arts Center. Over 800 people attended this event. After the preview, Gene Grant moderated a panel discussion with the co-producer Paul Barnes, and local historians and authors.
- We held a reception and screening for the premiere of season 5 of *Downton Abbey* in Santa Fe in December 2014. 800 people attended the screening. In addition we co-hosted a *Downton Abbey* tea with Los Polbanos Historic Inn. Over 100 people attended the Edwardian tea, many in costumes.
- In April 2015, we hosted a Community Cinema screening and discussion with community members of the Academy Award nominated documentary, *American Experience: Last Days in Vietnam*. Over 400 people attended the screening.
- NMPBS membership raised \$2,868,206 against a goal of \$2,800,000. It was the highest grossing year for donor support in the station's history with a 4.9% increase over FY14. The additional revenue was attributed to the acquisition, lapsed, and additional gift mail

campaigns increasing 8% over projections and to the continued excellent growth in the sustained giving program. The tax receipt additional gift mailing, for example, generated over \$10,000 in net revenue. On-air pledge revenue represented approximately 60% of overall membership revenue in FY14.

- The station worked with Los Alamos donors on broadening the use language for their endowment, the Neepier Natural History Endowment Fund for KNME, enabling the station to direct the annual payout to support more programming and offset a portion of its program acquisition expenses.
- New Mexico PBS hosted approximately 20 VIPs at the July 2014 tapings of its popular series *Antiques Roadshow* when the show was in Albuquerque. It was an effective high level cultivation opportunity.
- The station hosted a private donor dinner, specifically for major donors, in conjunction with *Ken Burns: The Roosevelts* screening in Santa Fe in September of 2014. Series producer and Santa Fe resident, Paul Barnes, was a featured guest.
- NMPBS presented two *Downton Abbey* events in December, which served as excellent stewardship events for major and long-time donors.
- The station raised approximately \$30K for the arts and education endowment from the Great Southwestern Antique Show and the Objects of Art – Santa Fe shows in August of 2014. It was the second year of a three year commitment to raise \$100,000 in endowed funds for NMPBS. The network was named the beneficiary for a fourth year in August 2016.
- NMPBS continued to make Payment Card Industry (PCI) Compliance a top priority for its donors by strengthening security procedures across the station.
- NMPBS received \$25,000 in estate gifts last fiscal year from three matured donors. It received notification of three planned gifts expected in donor wills.
- NMPBS launched the donor interface model of its constituent management software in FY15. Donors may now change basic demographic information online, as well as donate to the station with the secure user interface.
- NMPBS saw corporate sales increase by 10% over the previous fiscal year with a gross amount of \$346,945. Traded inventory contracts totaled \$134,099 for a combined total of \$481,044.
- In addition to on-air program sponsorships, the corporate support department raised \$20,000 in support of NMPBS STEM-based initiatives, \$5,000 in support of a children's literacy contest and \$8,000 in support of two *Downton Abbey* themed events.
- NMPBS, in collaboration with our two sister stations KRWG in Las Cruces and KENW in Portales approached the legislature requesting \$750,000 apiece, \$2,250,000 in total capital funding, to update our master control facilities. We were unsuccessful in our request.
- NMPBS, in collaboration with our two sister stations KRWG in Las Cruces and KENW in Portales were successful in forestalling \$100,000 in suggested cuts to our line item appropriation.

- NMPBS was contracted by United Way of Central New Mexico to produce 60 second television spots for *Mission: Graduate*. The spots were shown at APS High School, CNM, and UNM Graduation Ceremonies. The spots will move to on-air and web promotional campaigns.
- The Public Broadcasting Service in Washington announced that NMPBS (KNME) has been selected as a test partner for V-6, the next PBS Network interconnection system. The system will allow digital content contribution to the PBS network and other V-6 partners. The project is 100% PBS funded. This project places NMPBS at the leading edge of a technological paradigm shift in the PBS system.
- Thanks to special consideration by the Federal Communications Commission (FCC) approved construction and operation of a translator for the Zuni Pueblo. This translator is expected to serve over 8,000 people who currently do not have access to a free public television signal. NMPBS was successful in securing a USDA Rural Utilities Grant to pay for the construction.
- For the first time, affordable computer modeling software became available to comprehensively map the entire KNME Full-Power and Low-Power coverage area. The software also shows accurate population counts within the coverage area with data tables tied to the 2010 U.S. Bureau of Census data. In preparation for the spectrum auction we are producing a survey of the population under translators. Our current modeling indicates that 536,000 New Mexico citizens live under NMPBS translator coverage.
- On October 17, 2014, the FCC granted approvals for the renewal of both licenses for KNME-TV and KNMD-TV. Both licenses are valid through October 1, 2022.
- We have established a Producer-Director (On Call) position to supplement contract production resources. This new position was created as a less complex and lower cost alternative to using freelance and contract based personnel. The concept worked well to allow talented recent UNM graduates to produce television programs on an as-needed basis. The On-Call Producer-Directors can be hired as needed. They report to the Production Manager.
- KNME's audit for the fiscal year ended June 30, 2014 was completed in December, 2014 and an unqualified opinion was received. Using this audited data, the following required reports for the fiscal year were prepared and submitted to the Corporation for Public Broadcasting (CPB): Annual Financial Report (December, 2014), Station Activities Benchmark Study (March, 2015), and Station Activity Survey (March, 2015). Significant CPB grants received during FY2014-15 were: Community Service Grant (\$1,400,139), Interconnection Grant (\$25,330), and Distance Service Grant (\$48,950).

IV. CURRENT PROJECTS

- By way of a stipend from PBS, NMPBS is participating in National Estate Planning Awareness Week this October. Postage-paid cards requesting an estate planning booklet were mailed to 5,000 donors mid-month. Donors who request the booklet will be encouraged to name NMPBS in their estate plans. They will also become part of a planned giving expectancy pipeline to manage solicitation and stewardship. In addition, Marketing is executing a comprehensive multi-media plan “Are Your Ducks in a Row?”
- The station is taking advantage of turn-key pledge events offered by PBS. Such opportunities test non-traditional pledge programming outside of regular drive periods. They are efficient to facilitate and often attract new pledge donors.
- In addition this year, we are involved in two separate projects with UNM students participating in the New Mexico Newport project. The first group of students helped produce and edit short video pieces emphasizing the Innovation Economy here in Albuquerque. Those video pieces are airing in our weekly Public Affairs show *New Mexico in Focus*. In addition, we are also working a different batch of NewsPort students on the Curious New Mexico project. These students are producing interstitial spots where the journalists answer viewer submitted questions about the city of Albuquerque and the state of New Mexico.
- Preparing informational meetings to present to the KNME Board, the UNM Board of Regents, and the APS Board of Education regarding the FCC Spectrum Auction and Repack. The Federal Communications Commission has scheduled a nation-wide Auction to begin March 29, 2016 and Spectrum Re-allocation occurring Summer 2016. Participation is voluntary and NMPBS management has set up several planning scenarios. We are actively engaged in education stakeholders, specifically our board and key senior managers under the licensees.
- Contingency planning for various outcomes of the spectrum auction. Given the likelihood that we will not be in the auction and will be repacked, we are planning for various scenarios requiring capital equipment replacement, including plans to upgrade to ATSC3 carriers and redesign of our translator network.
- In collaboration with our sister stations, KRWG Las Cruces and KENW Portales, we continue work on a \$2.25 million (\$750,000 per station) capital request to be submitted in the 2016 New Mexico State Legislature. The funds requested will allow replacement of oldest and most obsolete equipment in the Operations Center of KNME-TV.
- Securing rights and content to create DVD series of Albuquerque episodes of *Antiques Roadshow* to offer as premiums during 2015 Pledge drives.
- Planning for multiple events in Albuquerque and Santa Fe around 2016 premiere of *Downton Abbey* Season 6, the final season.

- Complete serialized documentary on iconic examples of New Mexico Art, *New Mexico Masterpieces* (w.t.). Individual segments will be produced as segments for *COLORES!* and then packaged into a one hour documentary.

V. FUTURE PLANS

- *New Mexico in Focus* is working with public media outlets in New Mexico to collaborate on a host of Public Affairs initiatives. Working in conjunction with KUNM, UNM Communication and Journalism News Port, and NM In Depth we hope to provide a robust investigative reporting arm that provides opportunities for UNM students while creating more relevant content for the viewers.
- Seeking funding for continuation of current local programs *New Mexico in Focus* and *COLORES!* Seeking funding to begin a new series *Connect*, on entrepreneurs and tech transfer.
- NMPBS will participate in *Passport*, formerly Membership Video on Demand. The initiative will give members access to a vast library of PBS and local content via PBS.org and PBS mobile apps. It promises to make available exceptional programming in a way that benefits membership and provides advanced marketing opportunities and will roll-out publicly in early 2016.
- NMPBS is working to secure the services of a public media underwriting consultant to increase corporate gift revenue. The consultant specializes in repacking and re-pricing unsold inventory and then crafting value proposition pitches to new and former station clients.
- *New Mexico in Focus* is planning expanded legislative coverage with the same media partners, UNM Communications and Journalism News Port and NM In Depth, in the 2016 legislative session.
- NMPBS iconic series *COLORES!* will start its fourth season since re-establishing it in January 2013.
- Pending securing a capital request in the 2016 Legislative Session we will begin a rebuild of KNME/KNMD master control systems.
- Beginning a strategic initiative to create a series devoted to Veterans issues and affairs.
- Through a partnership with the Santa Fe Symphony and the Santa Fe Institute we are planning a production of series devoted to exploring the connections between music and science. Our first production, *The Majesty of Music and Math*, is in the early planning and fundraising stage.

Appendix F



FY 2014-2015 Annual Report

Parking & Transportation Services

Submitted by:

Barbara Morck, Director

<http://pats.unm.edu>

Mission and Vision

Mission

We support the University's education, research, and service missions by providing access to key programs for faculty, staff, students, and visitors through a variety of transportation services that consider the needs of each customer.

Vision

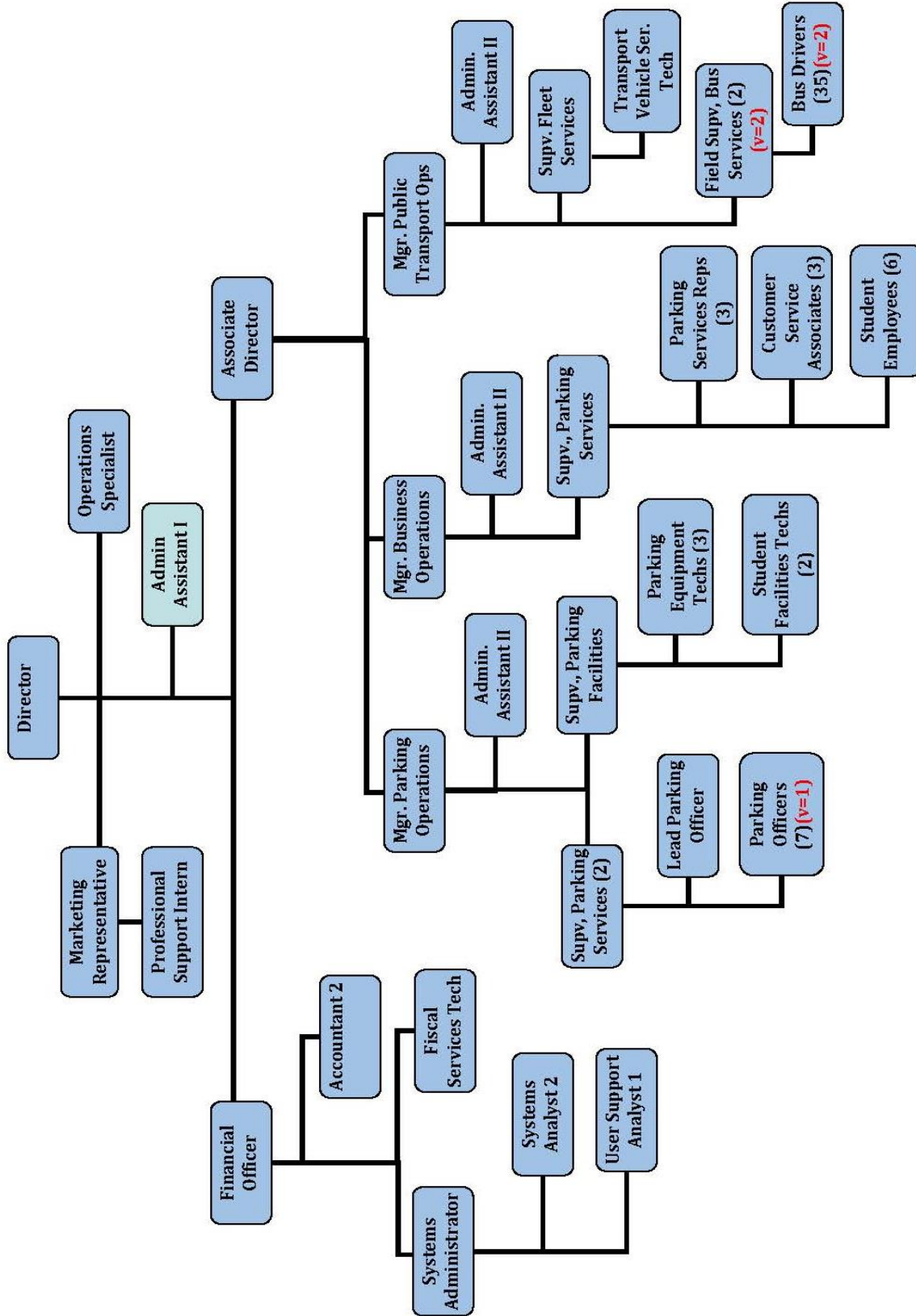
To be a point of pride for our staff, University, and State by:

- Delivering exceptional value to our customers and employees
- Being an integrated part of the learning community
- Offering services and systems that are easy to understand, use, and manage
- Utilizing industry best-practices and cutting edge technology
- Demonstrating effective stewardship for our natural environment

Our Values

- Service to our customers, colleagues, and community
- Integrity honesty, fairness, trustworthiness in all we do
- Continual Improvement in our processes, products, service, & ourselves
- Professionalism, competency, judgment, reliability, accountability, self-motivation
- Open-Mindedness when facing new or different people and ideas

Organizational Chart



2014-2015 Annual Report

Table of Contents

I.	Executive Summary	51
II.	Accomplishments	51
III.	Current Projects	54
IV.	Future Plans	55
V.	Department/Staffing Information	55
VI.	Recommendations	57

I. EXECUTIVE SUMMARY

UNM Parking & Transportation Service's (PATS) mission is to help ensure access to key programs for students, faculty, staff, and visitors of UNM through a variety of services that consider the needs of each customer. According to a study conducted in 2013 there are over 44,000 students, faculty, and staff on the UNM/UNMH campus at any given time. These numbers reflect that in addition to academic mission of UNM, it is also the number one destination in the state and specifically the Albuquerque metropolitan area. To meet the parking and transportation needs of its customers, PATS provides a range of services that include permit parking, visitor (hourly) parking and a campus-wide shuttle service, as well as alternative transportation programs such as the Bike Locker Program and ABQRIDE Bus Sticker Program.

PATS currently provides an extensive and effective campus shuttle service that connects the Main, North, and South Campuses, and connects the park-n-ride (commuter) lots to the Main Campus. UNM's growth in its urban environment and how it fits as a member of the Albuquerque community are two key themes that continue to impact the services offered by PATS. These themes challenge PATS to adapt and change in order to meet its mission of ensuring access to the University. Because we are a land-locked University, growth at UNM often includes construction on top of land that currently is a revenue-generating parking lot(s), which in turn has the unintended effect of decreasing the amount of available parking while increasing demand. PATS continues to explore how to best meet the parking and transformational needs of its customers, and how to do so in the most as efficient, cost-effective manner as possible.

This year has been a rather dynamic year for PATS. Much of the new construction occurring on campus affects parking and transportation services. To best meet the challenges in a proactive manner to ensure continued, accessible and appropriate access to campus for students, faculty, staff, and visitors, we continue to work collaboratively with other UNM departments and outside agencies. The departments and agencies include, but are not limited to, Planning, Development and Construction (PDC), Physical Plant (PPD), University Architect Office, Health Sciences Center (HSC), City of Albuquerque/ABQRIDE, and Mid Regional Council of Governments (MRCOG).

II. ACCOMPLISHMENTS

Administration

PATS continued to expand its communication/outreach efforts to customers and visitors to UNM regarding lot closures, shuttle service disruption/detours, campus events that might affect parking, and/or traffic flow. Communication efforts include use of Facebook and Twitter as well as formal press releases, emails to permit holders, and advertisements in the Daily Lobo. PATS continues to work with other UNM departments who also use social media, by sharing and re-tweeting information and notifications as appropriate.

- Capital Projects:
 - Split cost of resurfacing parking lot at 1650 University with Health Science Center (PATS paid \$215,816.07), and took on responsibility for permitting and enforcement of 1650 ("U" lot) and 1642 (the old Elks Club).

- Started compressed natural gas tank replacement program to save on new bus purchases.
- Invested in upgrading the new elevator in Cornell garage. Project completion pending late summer/early fall of 2015.
- Fixed and upgraded person railing in Cornell garage.
- At request of UNM Real Estate, installed pay station machine at S&TP for use by visitors to the Park.
- Took delivery of a new 40 foot CNG-fueled January 2015 (cost of \$192,631.00). This bus replaced a CNG-fueled bus that had been purchased in 2001.
- Ordered two (2) new 40 foot CNG-fueled buses in May 2015 for delivery before the end of the calendar year (cost of \$197,461.00 per bus). These buses will replace two CNG-fueled buses that had been purchased in 2001.
- Campus wide projects (Planning, Development and Construction or PDC):
 - SMLC Addition- Project displaced 23 parking spaces temporarily and will permanently displace five parking spaces.
 - Clark Hall Remodel- Project displaced eight parking spaces temporarily.
 - On-going evaluation of parking lots in order to identify pending maintenance and repair needs and to ensure.
 - On-going evaluation of accessible parking spaces in order to ensure there is adequate and accessible access to all areas of UNM campus.

Business Operations/ Financial / Information Technology

- As part of the effort to ensure more efficient citation issuance and provision of clear evidence photographs for all written citations, PATS continued to explore improvements in use of the handheld devices.
- In response to customer feedback from students, faculty, and staff, PATS changed pay station parking rate to \$1 per ½ hour (was \$1.75 per hour).
- Moved all pay station equipment to a cellular network, per PCI compliance.
- Identified which pay station equipment can be made fully PCI compliant. Programmed Capital Plan to include replacement of equipment that cannot be made compliant; purchase and installation to be completed by March 2016.
- Moved Virtual Desktop from test to production and assigned virtual web workstations to members of management team and select exempt staff.
- Internal Audit
 - Successfully closed all Internal Audit findings in February 2015.
 - Created stringent set of user permissions in the parking software management system (Flex) based on Roles associated with work position.
 - Set stringent guidelines for approval of user roles and permission changes with roles as well as temporary position assignments.
 - Created comprehensive auditing process to track all transactions performed in Flex that involve a reduction or void of any and all citations.
 - Created a process to reconcile payroll deductions for permit fees on daily basis and based on position status change or separation from UNM.
- Continued to work closely with the Dean of Students office to address concerns regarding students demonstrating severe and repeated parking infractions.

- Continued to use LoboCard scanning capability with instant eligibility lookup for ABQRIDE bus pass issuance. This process was implemented in FY 2014 and resulted in noticeable decrease customer wait times (from three minutes to less than 30 seconds).
- Collaborated with ASUNM on the second annual Parking and Transportation Services Summit to address student concerns about parking.
- Collaborated with GPSA regarding a Parking & Transportation Services Summit on the North Campus to address parking and transportation concerns specific to graduate students.
- Implemented use of repositionable permits for all student permits in all lots and structures.
- Ended use of repositionable permits from the faculty/staff T lot permits (returned to use of hangtags).
- Improved the reconciliation process for payroll deductions, with deductions reconciled monthly rather than quarterly.
- Transferred close to \$800,000 to capital funds. The department contributed \$400,000 to the ISS capital program.
- Inventory counts were successful for the year. Continued to evaluate and improve controls for inventory management and continued practice of counting inventory three times per year (UNM requires one per year).
- Saw slight increase of 0.65% in revenues, despite unfavorable student enrollment (down by 2.64% as per source: <http://oia.unm.edu/documents/enrollment-reports/fall-14-oer.pdf>).
- Contributed close to \$500k in goodwill towards University programs and events. Examples include Music Preparation Program, the annual Sports Animal Remote Show, US Forest Service, and the Lobo Food Pantry. PATS assisted various UNM departments with discounts which allowed them to afford reserved parking and/or special shuttle services despite limited budgets.
- Saw overall increase of 27% / \$106,000 in Special Events revenue from FY 2014: 33% from Outside sources, 28% from Popejoy, and 12% from Interdepartmental.

Transportation

- Had approximately 1,553,754 passenger boardings (average of 6,091 per day).
- Drove approximately 305,731.90 miles in provision of transportation services.
- Provided shuttle services for 192 special events and had 49,386 passenger boardings.
- Continued to effectively use internal, campus, and external sources for fleet maintenance and repair services. Maintenance flexibility helped achieve an 83% in-commission rate for the bus fleet.
- Combined two South Campus shuttle routes during evening and non-peak periods (intersession breaks). Combining the two routes resulted in a cost savings while still meeting the transportation needs of our customers.
- Completed the restoration of driver's seats on 15 buses (seats were worn beyond use).
- Effective October 2014 and per an agreement with HSC, added hourly shuttle service to 1650 University Boulevard (U Lot). Service operates Monday through Friday between 7:23 AM and 5:30 PM.
- Continued encouraged use of the "Where's My Bus?" smartphone application LoboMobile.

Parking Operations

- Continued to performed “Focused Enforcement” activities for accessible parking spaces (handicapped parking spaces), with the goal of deterring potential abuse of said spaces. Of the 243 accessible parking placards checked by Parking Enforcement officers, 28 were found to be invalid and/or were confiscated.
- Completed 746 of 865 Work Orders in FY 2015. Remainder were either cancelled and/or are pending completion in FY 2016.
- Implemented use of Spiceworks to track internal work order requests, work progress and outcomes (Spiceworks is a free software program).
- Completed the following summer projects:
 - Refurbished (crack-fill, seal coat, re-stripe): R Zone, C-Anderson Lot, G Lot, C-PSC Lot, M-PPD/(old) PCD Lots, and parts of Science & Technology Park Lots. Total Square Footage refurbished = 1,113,660.21
 - All Pay Stations parking spaces received new stenciling and striping
 - All North, Main, and South Campus Bus Stops received new painting
 - Repainted most of the fire lanes and yellow curbs on the North, Main, and South Campuses.
 - Project managed the refurbishment of UNM Foundation’s parking lot.
- Yale Parking Structure: Warranty worked was again performed on the “shear brackets” that tie the deck plates together. Bracket welds were breaking; worked with UNM OCP with goal of repairs completed by late Fall 2015.
- Cornell Parking Structure: All interior steel bumper barriers re-secured to columns and repairs along deck edges caused by barrier failure performed (total project cost \$19,004.08).
- Lomas Parking Structure: Performed repair work on the northwest corner stairs to replace failing risers.
- Provided project management services to UNM Real Estate and Science and Technology Park (S&TP), for lot resurfacing and striping at the Park.
- Provided project management service to UNM Foundation for parking lot resurfacing.

III. CURRENT PROJECTS

- **Campus wide projects**
 - SMLC Addition Project construction was completed and resulted in permanent loss of five parking spaces in the B-Bandelier Lot.
 - Clark Hall Remodel Project construction continues and temporarily displaced eight parking spaces in the B-Clark Lot.
 - Working in collaboration with Planning, Development and Construction department (PDC) and the City of Albuquerque (CABQ), on strategies pertaining to CABQ’s Albuquerque Rapid Transit (ART) project, and how it might benefit and/or otherwise impact UNM.
 - Working in collaboration with PDC and other UNM departments on construction activity and how it will affect parking and/or shuttle service at UNM.

IV. FUTURE PLANS

- **Future Capital Projects**

- Refurbishment of the Q Lot, Mental Health Lot, and B-Bandelier Lot.
- Replacement of Compressed Natural Gas (CNG) tanks on three more buses prior to their expiration date(s).
- Purchase of one service vehicle to replace vehicle that has exceeded its useful life.
- Increase of safety and security throughout PATS facilities with purchase and installation of improved camera system. Process of gathering information in preparation for release of a bid or proposal document and in coordination with UNM and ISS IT departments, is slated to begin in Fall 2015.
- Relocation eastbound Law Bus Stop onto Tucker Blvd. New location will make the stop more accessible to the public so that it is in compliance with current ADA requirements. Relocation of bus stop will eliminate unnecessary maneuvering inside of M-Family Practice Lot, which is heavily congested.
- Purchase two-three new light-duty (Cutaway) CNG-fueled buses to replace same number and type that have exceeded their useful life.
- Purchase of new 2-way radios for installation and use in the shuttle fleet, as current 2-way radios can no longer be properly repaired.
- Add outlets in PATS' shuttle parking area by Fall 2015. The outlets will allow buses to be plugged in overnight during inclement weather for easier engine starts in cold mornings, which will help prevent service disruption.
- Purchase of new pay station equipment to replace current equipment that cannot be made PCI/EMV compliant.
- In collaboration with Lobo Development, demolish old PATS building (Central and University), backfill and pave to increase parking spaces in that lot.
- Continue to work with HSC, Real Estate, and PCD as part of the preparation for loss of parking spaces due to construction and identification of potential points for collaboration in the creation of new parking spaces. Preparation will include projection of possible costs and identification of possible funding sources needed for construction of new parking structure and/or paving of existing sites for creation of new surface lot(s).

- **Internal Process Improvements**

- Add LoboCash use for payment of pay station parking.
- Move annual renewal of Departmental Reserved parking spaces to an auto-renewal process, with invoicing and payment via Index Code/Journal Voucher.
- Move annual renewal of Rover permits to an auto-renewal process, with invoicing and payment via Index Code/Journal Voucher.

V. DEPARTMENT/STAFFING INFORMATION

Challenges continue in recruitment and hiring for open Bus Driver positions due to FMCSR regulations regarding Sleep Apnea. During the fiscal year two recruitment efforts took place which resulted in the hiring of six new Bus Drivers. There were no significant changes in the recruitment and hiring of student employees, who work out of Business Operations and Facility Operations. There were 28 separations that included one Manager-Public Transportation Operations, one Field

Supervisor-Transportation Operations, nine Bus Drivers, five Parking Enforcement Officer, one Operations Specialist, one Accountant II, one Public Information Representative, one Marketing Intern, one Supervisor-Parking Operations, one Fiscal Services Tech, and six student employees. The separations occurred for the following reasons: two promotions to other UNM departments, six retirements, two relieved during probation, 16 resignations, and two end of contract.

Staffing

End of FY15 staffing was as follows:

1 Director	1 Associate Director
1 Financial Officer	1 Operations Specialist
1 Accountant 2	1 Fiscal Services Tech
1 Manager-Parking Operations	3 Supervisors-Parking Operations
3 Parking Equipment Techs	1 Parking Services Tech-Students
8 Parking Enforcement Officers	1 Manager-Public Transportation Operations
4 Field Supervisors-Bus Services	1 Supervisor-Fleet Services
1 Transport Vehicle Service Tech	35 Bus Drivers
1 Systems Administrator	1 System Analyst 2
1 User Support Analyst	1 Manager-Business Operations
1 Business Operations Supervisor	3 Parking Services Representatives
3 Administrative Assistant 2	3 Customer Service Associates
1 Administrative Assistant 1	6 Parking Services Representatives-Students

Frontline staff appointments and separations of parking officers, bus drivers, and students have not been enumerated.

Reclassifications and Promotions

Wendell Billingsley, Lead Parking Enforcement Officer
Daisy Strawn, Accountant 2

Appointments

Michelle Peeples, Associate Director
Raul Martinez, Manager Transportation Operations
Nicole Lopez, Operations Specialist
Aislinn Maestas, Public Information Representative
Tyler Masterson, Marketing Intern
Becky Lucero, Administrative Assistant 1
Valerie Gelabert, Fiscal Services Tech
Mark Russell, Facilities Supervisor

Separations

Aislinn Maestas, Public Information Representative
Tyler Masterson, Marketing Intern
James Grafeman, Field Supervisor Transportation
Monica Candelaria, Accountant II
Alicia Solano, Operations Specialist
Valerie Gelabert, Fiscal Services Tech
Ricard Kozel, Facilities Supervisor
Alexander Aller, Manager Transportation Operations

- Several of PATS staff continue to serve as members of Staff Council: Aaron Cowan and Tyson Eakman.
- Richard Sobieski completed his Masters of Business Administration with a concentration in Finance (December 2014).
- Wendell Billingsley is working on a BA, and Eric Parker is working on completing a Masters.
- Staff Awards and Recognition Committee promotes a peer-nomination process for annual staff awards. The committee secured door prizes and award donations from a variety of community partners and businesses, and planned and executed the Annual Staff Awards Banquet. Individual staff awards and education recognition certificates were presented at the banquet. The ceremony was held at UNM's Science and Technology Park, and focused on Age Diversity.
- To celebrate the start of UNM's fall semester and to continue to promote safe and effective driving, Transportation division held their annual bus "Roadeo" at the end of their summer training sessions. Drivers are judged on their pre- and post-trip inspections and their ability to safely maneuver a 40 foot bus through a timed competitive driving obstacle course. The best driver is given an award; the winner for the FY15 competition was Kelvin Pouncil.
- Inter-departmental teamwork continues to be promoted through department-wide contests and potlucks.

VI. RECOMMENDATIONS

Perform a new Parking Study for the UNM campus. The last study was completed in 2005, and since then there have been changes/updates to both the UNM Master Plan and HSC Master Plan as well as physical, planning and financial changes in the overall environment.

Appendix G



FY 2014-2015 Annual Report

Physical Plant Department

Submitted by:

Jeff Zumwalt, Director

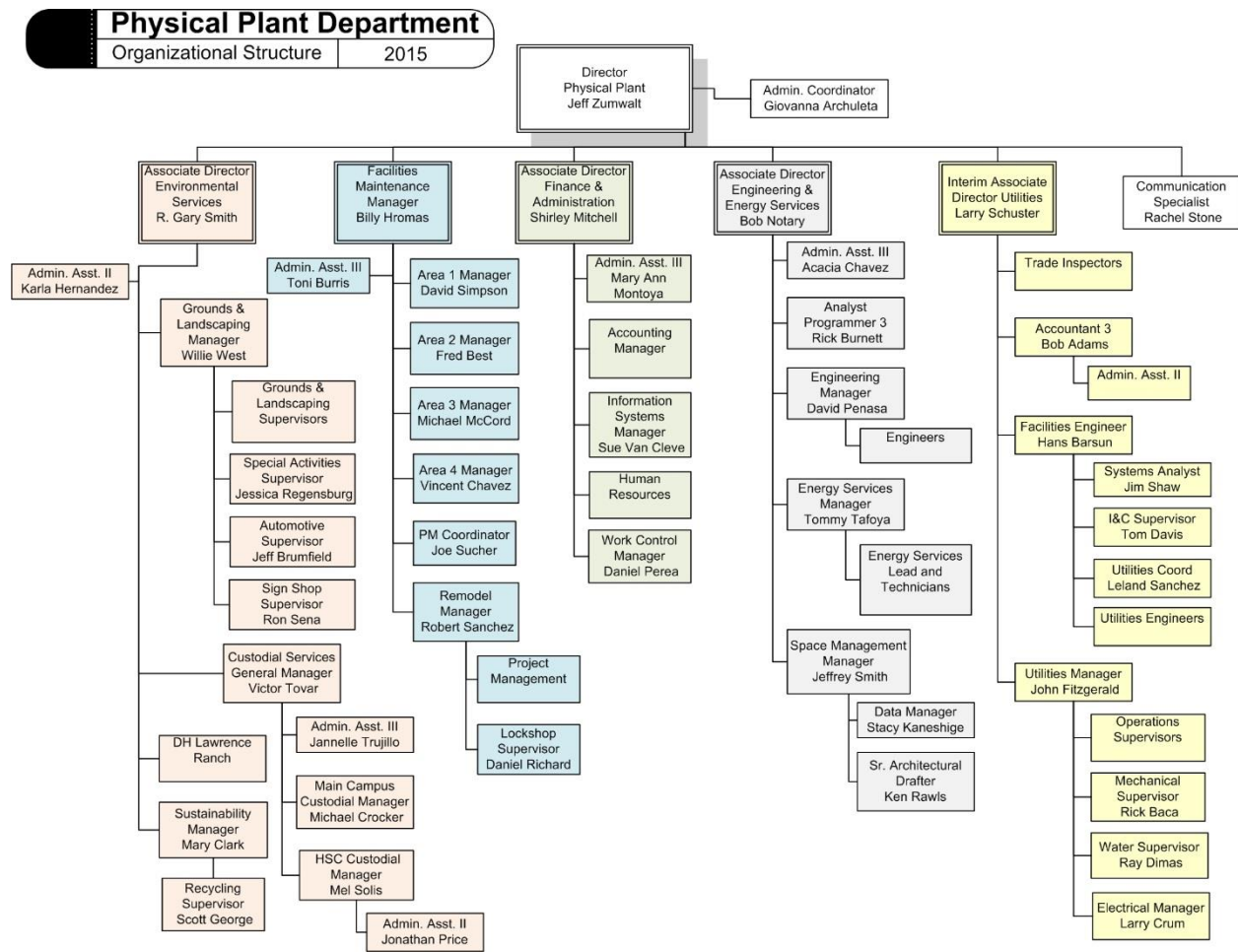
<http://iss.unm.edu/ppd>

Mission and Vision

The Physical Plant Department’s (PPD) mission is to consistently deliver effective programs and efficient facility services based on sustainable and collaborative outcomes aligned with the University of New Mexico’s core mission.

Our community, state, and national peers will recognize the University of New Mexico’s Physical Plant Department as a leader in campus sustainability and facilities stewardship.

Organizational Chart



2014-2015 Annual Report

Table of Contents

I.	Executive Summary	61
II.	Accomplishments	62
III.	Current Projects	71
IV.	Future Plans	73
V.	Department Staffing Information	75

I. EXECUTIVE SUMMARY

PPD is responsible for maintaining the physical campus in a manner that provides the campus community with an environment conducive to education, research, and public service. This includes the indoor and outdoor environment of what is commonly referred to as the North Campus (including the Health Sciences Center), Main Campus, and South Campus. Additionally, PPD maintains the University's district energy system providing electricity, steam, chilled water, and domestic water through its own distribution systems.

PPD is challenged with maintaining sophisticated facilities that require a highly skilled workforce. PPD prides itself on the level of training and the extensive credentials of its staff. The comprehensive education, training, and dedication of hundreds of employees enables PPD to deliver the level of service necessary to support the mission of the University of New Mexico. In July, PPD received the Award for Excellence from the leading education facilities industry group (APPA – Leadership in Education Facilities). The award was based on an exhaustive assessment of PPD's systems, processes, activities, and people. This is the highest institutional honor bestowed by APPA.

PPD is comprised of five divisions: Environmental Services, Engineering and Energy Services, Maintenance and Planning, Finance and Administration, and Utilities. During the year, each of the divisions supported the ISS goals of:

- Finance
- Customers and other Stakeholders
- Process Improvement/Quality Initiatives
- Human Resource Management
- Risk Assessment and Compliance

For PPD, the overarching objective of these goals is to identify opportunities to reduce expenses and to efficiently repurpose those funds to improve facilities for our customers. The primary strategies were benchmarking, risk assessment, communication, process refinement, and employee development.

PPD entered into an agreement with Sightlines to compare our operational performance with the 450 other campuses in their program. This effort continued into FY15-16. The results will be used to focus our energies on improving operational performance. The primary method of assessing risk is the facilities condition assessment. The assessment was started this year and will continue in FY15-16. It will identify the building systems that are most at risk of failure which in turn will provide focus for our minor capital renewal program. The department risk was also reduced by the development of a five year plan for the I&G Utilities Account and the Utilities Plant. This plan was completed and put into action in FY14-15.

PPD refined processes in several ways in FY14-15. One of the efforts of note was the creation of monthly financial review meetings with every manager in charge of PPD's 59 indices. These meetings elevated the financial knowledge of the managers and provided them with additional tools to manage their budgets. PPD improved the efficiency of the Building Renewal and Replacement process by moving to a single index per year. This effort supported both the Finance and Process goals. The process goal was bolstered by the complete revision of the department policies and procedures manual. This project was started in FY14-15 and will complete in FY15-16.

Lastly, PPD pursued several ways to improve employee performance and job satisfaction. In particular, PPD created an annual training program for managers and supervisors. The program has refresher courses for critical personnel management processes that occur infrequently as well as more general courses to improve supervisory skills. The department also completely revised the employee orientation program for new employees.

II. ACCOMPLISHMENTS

Environmental Services Division

The Environmental Services Division has five subdivisions: Grounds and Landscaping, Automotive, Custodial, Special Activities, and Sustainability.

Grounds & Landscaping

- Began providing additional services for the perimeter of the North Golf Course.
- Replaced concrete drive between Carlisle Gym and Northrup Hall. Created better pedestrian access and formed a landscape area that will enhance the appearance of the area. Replaced or repaired concrete at 54 additional locations.
- Worked with student groups to renovate several areas of Campus during the Fall Frenzy activities in September 2014 including the south side of Mechanical Engineering and the south side of Tucker at M-Lot on North Campus.
- In coordination with the Facilities Access Committee, continued to identify and improve access to the campus walkways by installing new ramps, walkways, and handrails. Projects included upgrading or installing 22 sidewalk ramps. In addition, we worked with the Governor's Commission on Disability to define an exterior handrail detail and modify or install handrails at four different locations. This will be an ongoing, multiyear project in order to address all areas of campus. The Commission will use the designs established here as a template for the remainder of the State.
- Complete irrigation system replacement at University House. New systems have reduced water usage in these areas by over 40%. Renovated additional systems throughout campus

to improve irrigation efficiencies and improve distribution uniformity. Water savings in these areas are expected to be 15-20%.

- Installed or replaced six drain inlets to improve drainage in Area 3. Installed drainage enhancements at the Physical Plant and Law School.
- Drained and cleaned Duck Pond in March 2015. This resulted in extensive media coverage and positive feedback for the University.
- Over 1,000 hours of training including: CPR, Heat Stress, Plant/Weed ID, Labor Relations, Safe Lifting, and Customer Service.
- Provided support to student groups and organizations for numerous events including: Freshmen Family Days, Welcome Back Days, Homecoming Festivities, Hanging of the Greens, Red Rally, Sustainability Fairs, Grower's Markets, and Graduation and Commencement ceremonies.

Special Activities

- Special Activities staff assumed responsibility for assembling, installing, and maintaining landscape features on Main and North Campus. This includes benches, tables, bike racks, trash cans, recycle cans, skate board deterrents, and other similar features. Assembly and installation of these items is a revenue generation function and utilizes in-house staff rather than hiring outside contractors.
- Performed over 500 hours of graffiti and sticker removal.
- Distributed ADA compliant tables and chairs to classrooms throughout Campus in conjunction with Accessibility Services.
- Continued support of major events such as: Graduation and over 30 Commencement Ceremonies in December and May, Freshmen Family Days, Welcome Back Days, Homecoming Festivities, Hanging of the Greens, Red Rally, Spring Storm, numerous University House events, and Science Fair.
- Special Activities staff completed 894 requests for event support and office moves.

Automotive

- Automotive technicians completed 2,385 service requests on the University fleet.
- Designed and began replacing all vehicle emblems on Physical Plant vehicles.

Sign Shop

- Completed 630 work orders during the year.
- Completed Phase 2 of the Monument Sign Replacement Project which encompassed South and North Campus.
- Collaborated with the University's Communication and Marketing (UCAM) department as well as Campus Planning and Development (CPD) to develop and adapt sign standards.

DH Lawrence Ranch

- The Physical Plant Department hired a new 0.5 FTE to provide maintenance, security, and visitor information for the ranch. Mr. Manny Medina began his position in the Spring 2015.
- A docent program was developed with the help of the Taos Community Foundation to provide tours and information to visitors of the ranch.
- 2015 saw several facility improvements at the DH Lawrence Ranch north of Taos. The most significant project was the development of a new water system for the public restrooms and caretaker's house. A pump house was constructed with a new storage tank, pump, and heat protection.
- A vehicle was purchased for the ranch, which will help provide emergency response and transportation, and will reduce maintenance costs on the existing fleet.
- A new metal roof was installed on the caretaker's house. The new roof is galvanized metal and was approved through the historic preservation committee.
- The "Lawrence Tree" was pruned to remove dead branches and correct other structural-related issues.

Main Campus Custodial

- The Main Campus Custodial Department supervisors began using iPads for their weekly inspections and to create work orders. This process is more efficient and eventually will result in a paperless work order system. The new technology has allowed supervisors to inspect more areas on a daily basis. We are focused on our team cleaning, floor care, and lead training.
- Main Campus Custodial Services consists of 119 FTEs comprising six sections: five custodial sections and one section specializing in floors. The staff covers 4,612,208 cleanable square feet of facilities at an APPA Level 2 cleaning standard.

- Staff training continues each month in the OS-1 cleaning system. During the fiscal year 2,000 training hours were provided to our custodial staff and 2,487 hours were devoted to special projects such as floor and carpet care projects.
- Main Campus Custodial Services continues to maintain a high safety rating and keeps awareness at a high priority level.
- Main Campus Custodial continues to look for ways to become more sustainable, such as using a flat mop system, which saves water and reduces labor costs. In addition, we are now using a battery backpack vacuum cleaner for lecture halls.

HSC Campus Custodial

- HSC Campus Custodial Services consists of 29 Custodians, eight Leads, two Supervisors, one Administrative Assistant, and one Manager. Our staff covers 1,073,392 square feet at an APPA Level 1 Cleaning Standard.
- All paper and chemical products have been standardized.

Office of Sustainability

- Three projects were approved by the UNM Green Fund Committee: one installation of ten energy saving devices on drink machines in Dane Smith Hall, Student Success Center, and Parish Library, two photovoltaic security lighting in plaza south of Regener Hall, and three installations of three water bottle filling stations in Dane Smith Hall.
- UNM was acknowledge in the Princeton Review “Guide to Green Schools” for the fifth year in a row.

Maintenance & Planning Division

The Maintenance and Planning division completed 44,402 work orders last year. That equated to over \$6 million of work. The division accomplished the following items this fiscal year:

- Safety: The division had a total of 17 reported accidents from June 2014 to July 2015. The PPD Safety committee continues to promote staff safety and awarded 10 safety awards of one day off with pay. The committee conducted a staff safety survey and will use the results to drive topics and programs in the future.
- Staff training: All Division staff received four hours of training in customer service. In addition, the Electricians received generator and emergency system training, the Plumbers received boiler maintenance training, and the HVAC Technicians attended refrigeration systems training. The Structural Technicians received roof maintenance training. This was a joint effort with Continuing Education. All Area Managers and Supervisors attended several

trainings. Topics included bargaining unit, DiSC, workers compensation, and media relations.

- Campus wide flood event August 1, 2014: A major thunder storm went through the city and dropped an estimated three inches of rain on campus in less than two hours. This high volume, short duration event overcame campus and city storm sewer capacity, causing water back up into low lying building areas and under doors and walls. Total damage to facilities was over \$2 million. Some areas were so damaged they did not get repaired for several months. Area staff oversaw these repairs in addition to all regular scheduled and corrective work.
- Elevator Equipment Repairs: The elevator hydraulic cylinders were replaced in Fine Arts, Northrop Hall, and Regener Hall. These projects addressed new elevator code deficiencies and added hydraulic leak containment to prevent environmental contamination. This left one cylinder at Castetter Hall and one at Farris Engineering to be replaced. A major Elevator modernization was also completed at the Cornell parking structure. This will insure reliability for visitors to Popejoy Hall.
- After-Hours voluntary overtime program: Area technicians continue to take advantage of the after-hours call back program. This program leverages our technicians' corporate knowledge to solve facility issues quickly and save money that would otherwise go to contractors.
- Water management program: The division implemented a HACCP based water management program in preparation for a new ASHRAE standard on air quality. The Division completed three quarterly bacteria and legionella water tests. 165 individual tests were completed and only five locations had positive results for legionella. These areas were remediated and retested and came back negative. At this time UNM is one of about 10 major universities with a HACCP based water management plan.

Remodel

- Remodel completed over 250 projects totaling approximately \$5.5M. Our staff was reduced which helped our cost effectiveness. Project surveys showed no decrease in customer service. A review of the business model was conducted and a new billing strategy was implemented to overcome reduced I&G funding. The review resulted in increased service fees of only 0.5%. Remodel added one project manager to the staff and hired a new operations specialist. Material procurement was moved to the project manager's level. Some of the major projects include:
 - Replacement of the complete roof at Northrop Hall and all Student Family Housing units on South Campus.
 - Replacement of all exterior stucco on Student Health and Mesa Vista Hall.

- Replacement of large sections of plaza roof pavers at Nursing and Pharmacy and Regener Hall.
- Major restroom renovations were completed in Johnson Center and Economics.

Utilities Division

- GTG#1: The cogeneration unit at Ford Utilities Center underwent one major unplanned shutdown. This occurred in June when routine testing of the unit indicated injector fouling due to oil carryover, the second such event in two years. The injectors were removed and cleaned, and the unit was restored to normal performance.
- Gas Compressors: The compressors were observed to have significant oil carryover that caused fouling of the injectors on GTG #1. Insufficient frequency in replacing the filters and draining entrained oil from compressor and GTG filters were determined to be the cause. The Division's Standard Operating Procedures have been updated to increase inspections and preventative maintenance to minimize the potential for reoccurrence.
- Lomas Chilled Water Plant Cooling Towers: The cooling tower fan blades on all cells were replaced. In addition, the fill in two cells was replaced. Significant performance gains were seen from the improved capabilities of the new material.
- Student Family Housing: The replacement of the electrical distribution system within the complex was designed, and construction was completed. The Elks' Lodge chiller was moved to the facility to provide replacement cooling capacity. Unreported mechanical issues prevented the unit from being used, and an alternate equipment source was identified. An identical unit will be installed in the next fiscal year.
- Mesa del Sol Micro Grid: The majority of the equipment at the facility was placed in layup status awaiting research funding. The facility air quality permit was suspended and will require an application for a new permit if the gas engine-generator set is reconnected.
- Solar Photovoltaic Projects: Thanks to the continued generosity of a matching fund donor, a third PV system (UNM West - 110 kW) was completed, and a fourth (93kW) at the UNM McKinnon Family Tennis Center was in procurement with a scheduled completion in the next fiscal year. An integrated display of all UNM PV output is being installed at the SUB.
- TMA Program: The Division PM program was thoroughly evaluated and reviewed. PM schedules and tasks for all equipment were reviewed and revised. The equipment IDs were input into TMA, and uploading of the specific PM tasks was underway.
- Energy Efficiency Projects: 30 High Pressure Sodium lights in Ford Utilities Center were replaced with industrial grade LED fixtures. This project will receive a PNM rebate.

Engineering & Energy Services

- The Space Management group was placed within the Engineering & Energy Services Division (E&ES) from the Planning, Design, & Construction Department during this reporting period. The common goal of ensuring efficient use of UNM resources makes this merger of significant importance to UNM.
- Energy Conservation Program: The annual savings of the E&ES Energy Conservation program now exceeds \$2.75 million and has avoided more than \$14,000,000 since inception. The individual building results have been quite remarkable. Many comparisons of pre-project and post-project utility consumption indicate a decrease in energy consumption of more than 40%. When considering the resulting improved building comfort and modernization to building systems, this program continues to make a significant impact on UNM.
- E&ES continues to receive awards of recognition from professional organizations and industry leaders. In this reporting period, E&ES received the Association of Energy Engineers (AEE) Corporate Energy Management Program of the Year and was a major contributor in UNM receiving the PNM Business Energy Efficiency Star award. Don Swick was honored with the AEE New Mexico Energy Engineer of the Year award, and David Penasa received the Section Meritorious Service award for his many years of leadership in the Illuminating Engineering Society.
- E&ES continues to support the overall university in providing leadership in standards and building design document retrieval. During the reporting period the efforts of organizing the building plan room was utilized in moving the documents to their new basement location. Concurrent with that effort, E&ES managed the long-needed scanning of all building drawings. These documents are now available electronically for use by UNM facilities staff and their professional consultants.
- E&ES once again expanded the breadth of revenue generating services that it provides throughout UNM including Branch Campuses and UNMH. This revenue enabled the funding of various departmental needs including significant energy conservation projects.
- E&ES provided additional services to the Branch Campuses. Control system installation services were provided at the Gallup, Taos, and Valencia Campuses as well as at the Sevilleta Research Station. Project commissioning services were provided at each of these Branch Campuses. The energy controls division continues to provide contract maintenance services to the Branch Campuses.

Communications

PPD Communications had several accomplishments and significant developments in its first year.

- Rachel Stone, PPD Communications & Outreach Specialist, was selected to co-chair the ISS Communications & Marketing Committee. The purpose of this committee is to strengthen internal communications within ISS.
- The ISS Communication & Marketing Committee requested funding to update all ISS department websites to a template provided by University Communications & Marketing (UCAM). PPD's webpage will include news feeds and a mobile-friendly design in FY15-16.
- PPD received the APPA Award for Excellence and the video produced to debut at the awards banquet was written and produced by Communications.
- Rachel Stone presented at the Rocky Mountain APPA conference in Santa Fe, NM. The title of her presentation was "What? I Have to Communicate?" She had approximately 40 attendees.
- New Employee Orientation was updated and first presented in May.
- Rachel Stone was selected to sit on the Capital Outlay Task Force to provide communications for the 2016 UNM Institutional Bond issuance.
- Rachel Stone was selected to the Rocky Mountain APPA (RMA) Board of Directors as the Communications Coordinator. She will be inducted to the RMA Board in FY15-16.
- A Media Intake Request Form was created to improve the department's responses to media inquiries and track the number of media requests the department receives.

Finance and Administration Division

- The PPD management team developed and implemented a Trades Training Program within the department. The program will provide on-the-job experience to PPD employees to prepare them for future opportunities as an HVAC Tech, Automotive Tech, Plumber, or Electrician.
- PPD enhanced and implemented a monthly review process for Financial and Capital Project Reporting. Meetings are conducted with the Director, Associate Directors, and Managers of each division. Budgets, Year-to-date Expenditures, and anticipated Balances are reviewed for all Operating Indexes. Completion Dates and projected Budgets are reviewed for all Capital Projects managed by PPD.

- LoboTime was fully implemented this fiscal year following two years of parallel testing. Special programming for the complex pay structures within PPD was completed during this transition period as well as training for all PPD staff.
- A five-year Utility Plan was developed to address the deficit in the I&G Utilities account as well as the deficit at the Utility Plant. The Plan included a rate increase that will improve the financial position of the Plant and identified funds to help offset the I&G Utilities deficit. The Plan was approved and implemented this fiscal year.
- The Finance & Administration Division went through significant changes with the retirement of two key managers and departure of other staff this fiscal year. The HR Department experienced 100% turnover this fiscal year when the HR Tech transferred to PATS, the Sr. Operations Manager retired, and the HR Administrator returned to the Main HR Department. Two of the three positions were filled. The duties of the Manager were distributed amongst the new HR Tech and HR Administrator, and the Associate Director of Finance & Administration. The Accounting Department also experienced vacancies when the Accounting Manager retired and one of the Fiscal Services Techs transferred to PATS. The Accounting Manager was back-filled with an Accounting Supervisor. The Fiscal Services Tech will not be filled at this time. That work has been distributed amongst the two remaining Fiscal Services Techs.
- Physical Plant staff organized and hosted the 2014 RMA Conference in Santa Fe in September. The event was a huge success due to the efforts of many staff members within PPD.

Work Control

- This year PPD initiated and completed 64,561 work orders. PPD uses TMA as its computerized maintenance management system. A total of 6,700 phone calls were received by Work Control staff during this fiscal year.
- The Work Control staff participated in a Customer Service class that was offered by EOD this year to refresh their customer service skills.

ISS IT

- The PPD IS Group purchased an additional 85 iPad minis and 85 WEBTMA GO licenses – totaling 165 iPads and 165 WEBTMA GO licenses. 59 of the iPads were distributed to the UNMH Facility Maintenance Department. Training was conducted for UNMH staff. The additional 26 iPads and licenses will be distributed to the Custodial, Lock Shop, and Grounds Departments in FY16.
- The PPD IS Group completed their annual computer replacement program by purchasing and replacing approximately 75 Dell desktop computers, laptops, and monitors.

III. CURRENT PROJECTS

Environmental Services

- Work was started on a visitor center area at the DH Lawrence Ranch, in the front of the caretaker's house. This center will provide a place for docents to occupy while performing visitor tours and as a future reading and video room. The new visitor center area should be completed by January 2016.
- Automotive began replacing the Compressed Natural Gas tanks on Parking and Transportation buses. These tanks expire after 10 years and must be replaced for the bus to remain in service. By replacing the tanks with UNM personnel, we are saving PATS significant expenses and keeping the funds within UNM.
- Main and HSC Custodial continue their participation in the water safety program and assist in keeping a safe environment for all students and employees.
- UNM Recycling began rebranding all its vehicles and equipment with its new "Green Footprint" logo and began painting all the metal outdoor bins a blue color synonymous with recycling
- UNM Recycling is reaching out to all residence halls to try and improve student recycling by training them on what can and cannot be recycled on campus.
- Sustainability Coordinator, Earl Shank, completed a survey of focus groups in preparation to write a sustainability strategic plan. The strategic plan will be completed in January 2016.
- The Office of Sustainability continues to sponsor events, which promote understanding of sustainability and sustainable practices. These events include the 6th Annual Sustainability Expo, Arbor Day, a women's volleyball green game, and a women's basketball green game.

Engineering & Energy Services

- Significant energy conservation and life safety projects are currently being completed at:
 - Domenici Mind: HVAC and lighting replacement with modern efficient systems
 - Johnson Center: Seidler Natatorium dehumidification system and lighting
 - Lomas Chilled Water Plant: Cooling tower blow-down water to the North Golf Course
 - Anthropology: HVAC and Lighting replacement with modern efficient systems
- Building Condition Assessment: Determine building condition index and deferred maintenance in support of facilities portfolio management program.

- Space Utilization Initiative: Lead the development of a program for efficient use of campus classrooms, labs, and offices and to provide input into the campus facilities capital planning.
- Campus facilities performance metrics: Leading a benchmarking effort with Sightlines to provide data to enable the accurate comparison of UNM facilities management performance to other institutions.
- Building Performance Teams: development of Engineer/Technician teams to collaborate with other energy professionals to monitor and fine-tune building performance.
- Campus Storm-Water Study and project development to reduce the risk of property damage during weather events.

Utilities

- To improve reliability and communication with the eDNA database, the Division will continue to develop the scope for an integrated plant control system, including replacement of portions of the Rockwell system and the Trane Tracer Summit chiller controls.
- Evaluation of the campus chilled water and steam load profiles to determine the feasibility of additional absorption cooling or thermal storage.
- The control wiring of both gas compressors will be replaced by in house staff to improve system reliability and potentially delay the installation of a third gas compressor.

Communications

- PPD Communications published 22 issues of the *PPD News* in FY14-15. The *PPD News* is a bi-weekly electronic newsletter distributed to 550 members of the UNM community.
- This year 15 news stories were written about PPD for the *UNM Newsroom* portion of the UNM website. These stories have sparked interest from *The Albuquerque Journal* and local television news stations to cover positive stories about UNM and the Physical Plant Department. There were a total of nine media inquiries reported for this year.
- The PPD Building Coordinator Meeting was held three times in FY14-15. The purpose of this meeting is to communicate PPD's operations, maintenance processes and procedures, and the building coordinators role in providing facilities that are conducive to the needs of the occupants of the buildings. The average attendance was 85.
- PPD Communications will engage the staff to participate in the PPD fundraiser (BBQ) to reach our goal of raising \$1500 for the United Way.

Finance and Administration Division

- PPD staff worked with EnergyCAP to develop and implement the new eCAP system. Programming for the Reformatter to Banner custom application for utility billing was finished this fiscal year. Final testing and full implementation will be completed in early FY16.

IV. FUTURE PLANS

Environmental Services Division

Special Activities

- Finish update of Special Activities website.
- Work with Purchasing to encourage UNM departments to request services prior to going to outside vendors.

Sign Shop

- Increase sales of banners and decals to UNM departments.
- Continue working with UNM entities to standardize signage on campus.

Grounds

- Increase revenues by 2% to offset reductions in I&G funding.
- Develop policy with UCAM to standardize newspaper bins and other bin installations.

Utilities Division

- Metering will be replaced in all electrical substations, increasing accuracy and reliability for both performance reporting and operational monitoring.
- The Division will pursue the use of iPads in conjunction with TMA, and evaluate their use for gathering plant operating data.
- Replacement of the cooling tower fan blades at the Ford Utilities Center.
- Compact fluorescent lighting in the campus utility tunnels will be replaced with LED fixtures in another PNM Self-Directed Energy Efficiency Program project.

Engineering & Energy Services

- Successful implementation of Space Utilization Initiative and follow-up policy making effort to be completed in a collaborative effort with the Provost's Office.
- Increase Building Commissioning to include building envelope analysis.

- Control system training for Maintenance Area Technicians.
- Establish one additional control system maintenance contract with a UNM entity.
- Hire additional Energy Service Technician(s) needed to meet campus demands for building controls installation work, energy performance management, as well as on-going building system maintenance activities.

Communications

- Overall, the goal of PPD communications is to maintain consistent and positive visibility in the UNM community through story writing, news updates, and personal interaction. It's important that with each opportunity, the impression of PPD is one of professionalism, expertise, confidence, and stewardship. This can be attained through consistent training of PPD staff and positive interactions between management and the staff.
- Communications will update the PPD Website to include a “news feed” and more up-to-date and useful information. Sue Van Cleve will train Rachel Stone to update the website.
- A survey of the staff at PPD and the campus community is needed to see if our communication efforts have made a positive impact. The internal survey will be compared to the PPD Work Climate survey conducted in 2009. The external survey will be a beginning stage to see how PPD is perceived on campus.
- Communications will develop more communication/outreach programs, particularly with the student population. This is a population that can elevate PPD's level of visibility on campus, and can assist in engaging the campus to recognize the importance of facilities management at our University.
- Communications will increase the use of social media to further reach our customers and community.

Finance and Administration Division

- The Accounting Department will conduct an evaluation of asset depreciation for all vehicles and large equipment owned by PPD. Recommendations for a phased-in approach will be made to the management team for consideration in the FY17 Budget.
- The duties currently assigned to the Financial Analyst will be reviewed to determine if others within the organization can provide back-up coverage for key processes and/or transition to others at a more appropriate level. This will allow the opportunity to increase the level of tasks currently assigned to the Financial Analyst and provide redundancy for critical processes.

- A financial review will be conducted to determine the feasibility of moving ISS IT to a self-supported ISU model.
- ISS IT is researching a Mobile Device Management system to help manage the 100+ iPad minis used for the WebTMA GO mobile application. The system will allow the group to better manage updates, patches, and access control of the iPad minis.
- ISS IT is developing a customized image to install onto desktops that will be applicable to the applications/features used by that department. This will aid in the turnaround time of computer replacements.

V. DEPARTMENT STAFFING INFORMATION

PPD began the year with 402 staff members. 64 employees joined our team this fiscal year. A total of 61 employees were separated (retirement, resignation, etc.) ending the fiscal year with 405 PPD employees. These totals exclude student, on-call, and temp employees.

Appendix H



FY 2014-2015 Annual Report

Planning, Design & Construction

Submitted by:

Amy Coburn, University Architect & Director

Rick Henrard, Director, PDC Capital Projects

<http://iss.unm.edu/pcd>

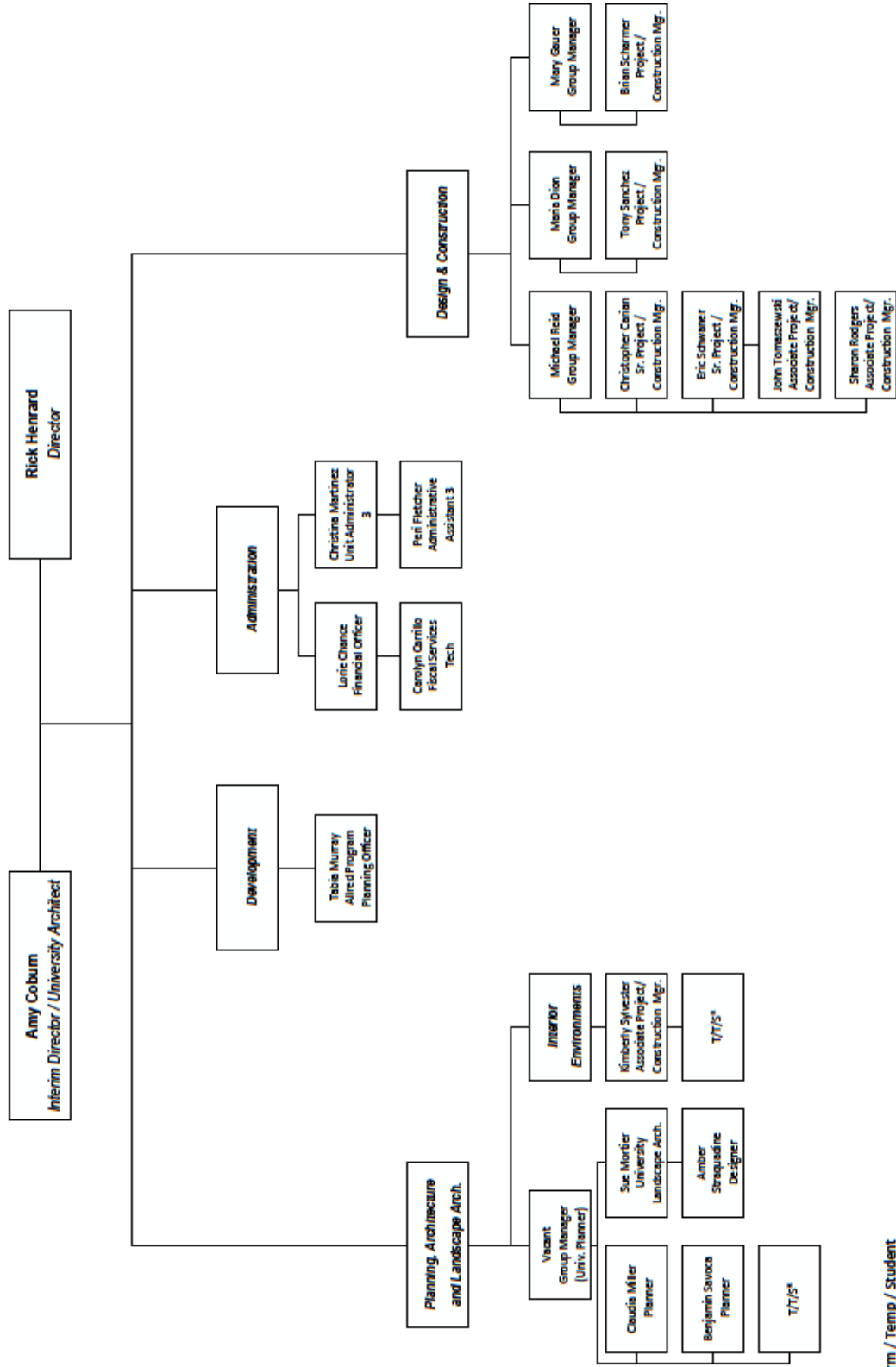
Mission and Vision

Mission

To steward UNM's campus identity and lead capital development to create outstanding environments.

Vision

Great spaces for great people doing great things!



• Term / Temp / Student

6.10.15

2014-2015 Annual Report**Table of Contents**

I.	Executive Summary	80
II.	Accomplishments	81
III.	Supplemental Developments	90
IV.	Future Plans	93
V.	Publications	93
VI.	Committee Participation	93
VII.	Staff Appointments	94
VIII.	Staff Separations	94
IX.	Outside Professional Activities of Staff	94

I. EXECUTIVE SUMMARY

UNM Planning, Design & Construction (PDC) had a successful year in all aspects of product development, internal operations, and customer service. A significant accomplishment was the successful merge of two independent ISS business units, Planning and Campus Development (PCD) with The Office of Capital Project (OCP) to a single functional unit, Planning, Design & Construction (PDC).

The goal of the unit merge is to create seamless delivery of professional support services and to facilitate best practices in capital project planning, development and construction on behalf of our internal clients. Our quality initiative is to integrate professional scope and responsibilities to fulfill institutional priorities for planning, architecture, design, and campus stewardship. As such, we worked to clarify PDC responsibilities relative to broad institutional roles of University Architect and Landscape Architect and campus and facility planning services. The outcome has been improved integration of design services with our project management leadership from project origination to closeout.

Over the year, PDC leadership worked to identify organizational opportunities and deficiencies within our team's human resources. We assessed staff competencies, overlaid individual competencies with organizational needs and have drafted a unified PDC merged org chart with a view to maximizing our existing human resource potential.

Our staffing plan is conceptualized to meet newly identified business challenges. We are mindful of the need to add staff in key areas and will work with the Administration to develop. Nonetheless, PDC is positioned to proactively pursue potential UNM clients who seek alternative modes to services provided by PDC (UNM Branch Campuses, HSC, and Athletics). We have also learned that PDC's business evolution generates a model of operation that may necessitate adjustments in related institutional units and have worked with units on these changes.

FY2014-2015 has shown signs of an increasing capital development program for UNM in particular for the major projects and UNM Branch Campus projects.

The department completed a total of 46 projects on time, on budget and with good quality and service. This is a significant increase 26% to the prior two years, which were 34 projects accomplished in FY13, and 33 in FY12. One difference between FY14 and FY15 is the completion of four major capital projects compared to three the previous year. This increase in productivity equates to \$132,573 in additional revenue compared to the last year. This will help support our revenue baseline for the next couple of years as the major capital project sizes have increased which reflects in the PDC management fees.

Our Minor Capital projects have also increased in raw numbers to 42 compared to 31 the previous year which equates to an additional revenue of \$38,158. Having several larger size major capital projects being planned with the consistent projections of minor capital will provide a solid fiscal foundation and baseline for projecting revenues for the coming year(s).

Another area of revenue growth for PDC has been scope associated with UNM Branch Campuses, in particular Gallup and continued productivity in Taos and Los Alamos. This was another area projected to have increases, which ended up being much more than anticipated due to the billing

cycle of the projects mostly falling in FY15. The increase in revenues equates to \$234,682 from branch campus work. We project similar revenues for the coming year as most of the current projects will continue into 2016.

PDC Construction Services Division (CSD), formerly OCP-General Contracting (GC) Division, has been our ‘wild card’ allowing us to adjust our delivery method based on revenue need. With the increase in major & minor capital revenues we were able to decrease our dependency on PDC-CSD which generated 11% of total revenue FY14 compared to 24% in FY13 and 41% in FY12. Careful management of CSD allowed our unit to concentrate more on general project management for revenue and less on general contracting projects.

PDC has been successful in generating revenue with management oversight projects. These projects are relatively limited in work scope compared to normative PDC fee-based project. Scope of work, responsibilities, and negotiated hours are determined and approved. Such project examples are UNM Medical Group projects for the HSC, and BR&R classroom renewal projects. These projects generated revenue streams of \$12,725 (FY14 provided \$25,789). However, this year over year variation is minor portions of PDC’s revenues.

This year PDC was successful in reaching a number of specific goals. Project Intake has been successful and continues to be improved. This has helped our UNM customers access project requests via a neutral website, thereby reducing confusion of group execution responsibility. We have been able to build metrics from data gathered from the Project Intake that allows PDC to better forecast workloads from the requests. The data will also describe project type and other sorting metrics. One of our goals for this coming year is a customer survey to reflect a merged unit, so we can receive feedback regarding quality of our service. Complementing the unit merge, PDC re-structured electronic and paper filing system into a unified system.

The office and its performance looks very positive going forward. The team is made up of many leaders and solid role models with a high morale. PDC is a high-energy group with a very good spirit. We have good practices in place and seek better efficiencies and process improvement. Our objective is to manage projects of high quality in budget, on time, good consistent services practices while minimizing risks. We look forward to another highly productive year of delivering excellent projects for an enhanced and sustainable environment for all in our UNM community.

II. ACCOMPLISHMENTS

University Architect

The University Architect role (filled in October 2014) is undergoing renewal and scope clarification in order to address significant and previously unattended business areas. The University Architect provides comprehensive guidance related to the institution’s built environment; specifically, strategic guidance supportive of campus master planning, programming, architectural development, building efforts, and best design practices.

The University Architect extends a unifying influence over many/most of the projects executed within PDC. The University Architect is successful through active internal partnering with PDC’s co-director, project managers, and staff.

University Landscape Architect

PDC Landscape Architect and staff Designer participated in collaborative efforts with various departments on many projects during this past fiscal year.

- **Helix Garden Phase 1:** The Landscape Architect consultant and the Civil Engineer completed construction documents for the first phase of this landscape. Construction began in May 2015 and was completed in July 2015. The committee for this very interesting project included various North Campus constituents that have championed this project for many years.
- **Lower Johnson Recreation Area:** Project included, demo and grading of entire site, installation of four half-court basketball courts, two sand volleyball courts with padded borders, large turf areas, 25 trees, various shrubs, boulder terrace planting areas and boulder seating, new irrigation system, benches, and stabilized crusher fine gravel paths. Project was 100% complete Nov 2014.
- **Collaborative Teaching & Learning Building (CTLB):** Added furniture to south side of building and west side of Tech Education Building to create gathering spaces for conversation and group study.
- **Pearl Hall ‘Lobo’ Planter:** Donor requested 3 Lobo statues and landscaping for the planter on the west side of the building. This was a collaborative design with the Director of the Landscape Architecture program.
- **Laguna/De Vargas Courtyard:** design for courtyard included pavement and stair repair, demo of fountain, and new furniture. Student Housing opted for fountain demo and related paving, some selected demo, and stair repair.
- **Other completed landscape projects:** Novitski Hall Renovation landscape, Time Capsule at University Club, bollards at east end of Roma Way, and Student Housing furniture.
- **Memorials:** Tree and other donations included Jan Zerr tree, JP Fabre tree, Joe and Bunny Colvin tree, and Tausif-Ur Rehman boulder.
- **Art:** Coordinated with PDC Planner and selection committees to commission and/or purchase and install work through the New Mexico Arts, Art in Public Places Program, for placement in 2015. The commissioned piece for UNM Pit was completed in April 2015.
- **Project Management Support:** Provided major support during the Donor’s Lounge construction. The project was completed June 2015.

Current Landscape Projects (In Progress)

- **Taos Central Landscape:** the conceptual plan for a large landscape area was approved. Construction plans were completed in conjunction with work at the new Student Success Center. The construction schedule and budget for the landscape area is in review.
- **School of Medicine Faculty Memorial and Landscape:** several construction and budget issues are being reviewed by a PDC project Manager was assigned to project. The site work has been redesigned. Design changes to the art piece are being considered.
- **Popejoy Donors’ Lounge Landscape:** After completion of the addition, a conceptual landscape plan was done for the east side. The design and cost proposal were approved. The installation will be in Fall 2015.
- **Hartung Hall:** wall removal and fence installation, design complete, construction is scheduled for winter break 2015.

- **'Lobo Plaza' aka 'Boxcar at the Lot':** coordinating design of the 'Lot' around the 'Boxcar' creating an eating/gathering area including furniture and planting. Completion in early 2016.
- **CTSC Planters and Furniture:** coordination with HSC for furniture and planter elements.
- **Chemistry:** south side landscape.

Planning

PDC's Planning Division provides full project planning services from assisting academic and service departments in assessing their minor and major capital project needs to developing capital scopes and full project programs. PDC has been able to save university funds by providing full programming services that direct the design and construction rather than paying or subcontractors, often multiple times, while capital projects realize funding.

PDC continues to be an advocate for UNM-wide capital project processes that develops rational projects and can adjust to shifting funding opportunities by managing the planning and development process from project inception through programming. Planning Project Manager for all planning phases through design for UNM minor and major capital projects and funding initiatives. Responsible for initiating and completing programming documents guiding capital projects design and construction.

Accomplishments/Significant Developments

- **Farris Engineering Center:** Renovations (\$26 million project).
- **Clark Hall Renovations:** Program completed in 2014 with continued design development support through 2015 (\$16 million project).
- **Physics and Astronomy Interdisciplinary Sciences:** Pre-programming for Interdisciplinary sciences scope of work and occupancy plan. (\$63 million project).
- **Taos Klauer Campus:** Masterplan site development in partnership with UNM landscape Architect.
- **Taos Student Success Center:** Design phase.
- **UNM Los Alamos Emergency Services:** Capital projects remodel planning and programming.
- **UNM West:** Revised master plan and five year development plan.
- **UNM Gallup:** Administered 10 year Master Plan.
- **Branch Campuses:** Responsible for all five year capital projects planning and Fiscal year capital requests development and scope of work.
- **UNM IT:** Redevelopment, consolidation plan with cost benefit analysis.
- **Meteorite Museum:** Redevelopment program.
- **Zebra Fish Program:** Renovation of research facilities grant.
- **COMPRES Renovation:** Programming for a national scientific center to be located at UNM.
- **UNM Crisis One Stop:** Renovation program.
- **Minor renovation and staff relocation plans:** For multiple clients including, Gallup, Taos, and Main Campus initiatives.
- **Programming Oversight:** For all 2014 funded capital projects programming both in house and contracted.

- **Zollinger Library:** Completed programming.
- **Facility Access Committee:** Fully spent down reserve funds and identified projects for FY15-16.

Responsible for initiating and completing facility and programmatic needs assessment which guide the development of capital projects and administrative policies. The following projects were completed in 2014/2015:

- **Taos Campus:** Strategic Plan initiative and roll out.
- **Taos Library:** Redevelopment including library collections policy recommendations and a realignment of modern library services.
- **DH Lawrence:** fundraising initiatives and five year donor funding plan.

Current Planning Projects (In Progress)

- **Farris Renovation:** In design.
- **Farris:** Vacation Planning.
- **PAIS:** Pre-programming and preparation for design.
- **PAIS:** Management and UNM Interdisciplinary Sciences planning.
- **Harwood Museum:** Facility condition report and capital projects plan.
- **Taos:** Complete 10 year master plan.
- **Phase 2 Clark Hall:** Needs assessment and capital project scope of work.
- **Gallup Campus:** Capital projects siting for 3 buildings (phase 2 master planning).
- **2015/2016 Capital Projects:** Planning for legislative requests all Branch Campuses.
- **Ortega Hall:** Strategic plan and space management.
- **Support ISS Staff:** For HSC Child and Elder Care Initiatives, UNM Historic Preservation Committee, and UNM Public Arts Committee.
- **UNM Transportation/Circulation Study:** A collaboration with Dekker/Perich/Sabatini and Bohannon Huston to explore concepts for altering Redondo in response to the PAIS and Johnson projects. Currently in the information gathering phase.
- **Construction Technology and Physical Plant:** Two separate but related projects to program and site facilities on the Gallup Campus. At present we are involved with site selection and determining whether the two facilities, which share similar infrastructure needs, could be collocated. Once we select a site we will be hiring an engineering consultant for site design work.
- **Johnson Center:** Continuing the work of several previous studies, we are programming improvements for Johnson Center in response to the \$35M bond set to go to market in February. Additional phases will be programmed as well. The project recently kicked off.
- **Northrop Hall:** A facility master plan for Northrop Hall seeks to rectify maintenance and infrastructure needs and to respond to the demands of the cutting edge research taking place in the building. The team is currently analyzing and synthesizing data and developing concepts which will translate into projects.
- **Zollinger Library:** This project will build out the shell space in the lower level of Gallup's Campus library and retrofit and upgrade portions of the upper level of the library to

accommodate a learning commons. The project has moved into the design phase and has just completed program verification.

- **Signage:** Numerous interior and exterior signage projects are underway. The Strategic Signage Initiative is an effort to draft interior signage standards and is drawing to a close. Engaging with several interior signage projects to incorporate the new standards.

Zone 1 – Main Campus

Projects of interest completed and occupied during 2014/2015:

• *Alvarado Student Lounge	\$41,000	1,456 s.f.
• *Bookstore 2 nd Floor Lighting Upgrade	\$285,000	27,456 s.f.
• *Hokona Cellar, Ballroom, & Theater	\$155,434	7,368 s.f.
• *RVA Hut Renovations	\$71,000	900 s.f.
• *Santa Clara Kitchen Remodel	\$51,100	200 s.f.
• *De Vargas Restroom Upgrade	\$240,000	4,760 s.f.
• *Laguna Restroom Upgrade	\$240,000	4,760 s.f.
• *Alvarado Dorm Renovations	\$296,000	16,124 s.f.
• *Hokona Restrooms	\$437,300	1,388 s.f.
• Alvarado / Santa Clara Window Replacement	\$282,000	N/A s.f.
• *Bookstore Restroom Upgrade	\$140,000	432 s.f.
• Northrop Room 122	\$236,000	2,830 s.f.
• Mechanical Engineering Room 218	\$100,000	1,365 s.f.
• Popejoy Hall Donors' Lounge Addition	\$494,780	688 s.f.
• Biology Building Completion (Castetter Hall)	\$3,850,000	11,000 s.f.
• Biology 120	\$74,468	729 s.f.
• CAPS Writing Center	\$58,046	2,392 s.f.
• Center for Stable Isotopes Lab Renovation	\$272,726	1,199 s.f.
• *Honors College Renovation	\$249,170	13,600 s.f.
• Human Resources IT Reorganization	\$164,767	2,383 s.f.
• STEM Collaboration Center	\$18,177	1,675 s.f.
• *Zimmerman Combined Service Point Learning Commons	\$1,540,000	17,478 s.f.
• Zimmerman Combined Service Point Learning Commons Furniture	\$299,000	17,478 s.f.

Project Highlights (In Progress and Completed):

- ***Bookstore Lobby Renovations:** This 888 s.f. renovation included new flooring, paint, and removal of lockers, added display window, signage, and furniture.
- **Chemistry Building Renovations (Clark Hall):** This \$16.5 million CMAR renovation to Clark Hall includes mechanical, electrical, and IT upgrades and is currently in Construction. This project also includes Research Laboratory Renovations and other support space improvements. It is scheduled to complete early 2016.
- **Science and Mathematics Learning Center Phase 2:** This 12,450 s.f. \$5.4 million addition to the SMLC includes teaching labs and faculty offices. Completion is scheduled for Summer 2015.

- **Physics & Astronomy Interdisciplinary Science (PAIS) Building:** This 137,000 s.f. \$66.4 million dollar project is in the process of needs assessment revisions and development of the RFP for architectural services. This project will include Research Labs, Offices, Teaching spaces, and other support spaces.
- ***PDC Merge:** This 6,376 s.f. project is a renovation of the first floor Service Building. This project is to accommodate the merge of two UNM departments (The Office of Capital Projects and Planning & Campus Development) into one group, Planning, Design, & Construction. Construction began on July 20, 2015 and is scheduled to complete November 20, 2015.
- **Lobo Plaza:** This project is to design and construct improvements to Lobo Plaza. Project budget is \$185,000.
- **Chartwell ICE Project:** This project includes the utilities and concrete pad for the Chartwell furnished concession crate. Project budget is \$70,000.
- **President's Suite:** This project includes new paint and carpet for the President's Suite. Project budget \$29,500.
- **Anderson School of Management:** This project provides a new \$25M 65,000 s.f. building for the Anderson School of Management. Programming was completed in April, 2015, with design to start late 2015.
- **Biology 120:** This 729 s.f. project renovated a lab in the biology building, into a Graduate Student office space. Scope of work included mechanical, electrical, and data upgrades new finishes, sink, and furniture. Budget was \$74,468 and the project completed in February 2015.
- **CAPS Writing Center:** Project remodeled two classrooms totaling 2,392 s.f. in the Education Building, including new carpet, counters, and finishes. Total project budget was \$58,046 and completed in December 2014.
- **Center for Stable Isotopes Lab Renovation:** The renovation of 1,199 square feet of lab space. Construction of this 1,199 Square foot lab renovation began in December 2014, with completion in January 2015. The project made space for specialized equipment, showcasing experiments and hosting international visitors.
- **Farris Engineering Center Renovation:** Voters approved the bond in November 2014, Special Session funds of \$1,968,000 were awarded in May 2015, and the program was completed that same month. Total project budget is \$23,269,500 and includes the \$19,419,500 renovation of the Farris Engineering Center as well as the \$3,850,000 School of Engineering Wet Labs build-out, located in the basement shell space in Centennial Engineering Center. The scope of work includes the renovation of Farris floors 1, 2, and 3; the shell of the Farris Ground Level; and the build out of labs in the Centennial Engineering Center Basement. Total project gross s.f. is 88,889. Both FEC and the SOE Wet Labs projects are in design. SOE Wet Labs construction is scheduled to begin in March of 2016, and construction on FEC is schedule to begin in Fall 2016.
- **HRIT Reorganization:** The project remodeled a classroom in the John and June Perovich Business Center Building, converting it into four offices. Other offices received furniture and carpet upgrades and the total project was 2,383 s.f. The project budget was \$164,767.
- **Johnson Center Expansion and Renovation:** Pre-development efforts on this project began in early 2015. The scope involves an addition to the southeast corner of the current Johnson Center building which would house amenities such as a multipurpose activity court, rock climbing and a running track. The project also includes code upgrades in parts of the existing building, as well as improved wayfinding and connection to Cornell Mall. The project was

approved for \$35,000,000 in University bonds in Fall 2015 and is in pre-development. Construction will begin in late 2017.

- ***Meteorite Museum:** This \$157,800 project covers renovates the 805 s.f. museum, located on the first floor of Northrup Hall. Scope of work included revised wall, floor, ceiling, lighting finishes, and exhibition cases. Construction began in February 2015 and will complete in October 2015.
 - **Ortega Hall Language Learning Center Phase 3:** This project renovates approximately 1,793 s.f. of space within the Language Learning Center (LLC) at Ortega Hall. The project will provide new AV upgrades, owner installed flooring, lounge furniture, three floor boxes with power\data, and ten huddleboards with track system. Total project budget is \$71,615 and is scheduled to complete in October 2015.
 - **STEM Collaboration Center:** This project renovated approximately 1,675 s.f. within the Education Classrooms building, providing new finishes and a new furniture layout. Project completed February 2015 and the project budget was \$18,177.
 - ***Zimmerman Combined Service Point Phase 2 (Learning Commons):** This 16,390 s.f. \$1,540,000 project renovated the Student Learning Commons on the first floor of Zimmerman Library. The project included a renovation of the staff area. Construction began on May 22, 2014, and completed August 7, 2014, with a public ribbon cutting in January 2015.
 - **Zimmerman Combined Service Point Learning Commons Furniture:** This project, approved in early June provided updated and functional furnishings for students in the newly renovated Zimmerman Commons space. New furnishings will facilitate collaborative learning and also improve student computer workstations. Project budget is \$299,000 and is scheduled to complete October 2014.
- * Projects performed under PDC CSD.

Zone 2 – Health Sciences Center

Significant projects completed and occupied during 2014/2015:

• 1650 University TI	\$7,400,000	104,897 gsf
• 1650 University FF&E (card access, network equip, window covering)	\$779,400	104,897 gsf
• 1650 University Occupancy Projects (7 dept's + common area)	\$2,042,049	49,810 nsf
• UNMMG Truman Health Services (TI and Bldg F Clinic Renov.)	\$1,339,200	15,200 nsf
• IDTC 3 rd Floor Internal Medicine Labs	\$507,147	8,373 s.f.
• Surge Code Upgrades	\$170,000	2,100 s.f.
• Surge Nursing and Pharmacy Clinical Trials	\$205,000	1,937 s.f.
• Novitski Dental Clinic	\$292,816	5,578 nsf
• BRF Anesthesiology Lab Renovations, G38, G38A, G40, G40A	\$295,817	1,330 s.f.
• College of Pharmacy, B39 Offices	\$201,014	915 s.f.

Project Highlights (In Progress and Completed):

- **1650 University TI and Occupancy Projects:** Substantial completion achieved September 18, 2014. First occupancy project move on September 19, 2014. All seven HSC departments

moved into the building by November 21, 2014. 104,897 gsf project, combined TI, FF&E, and Occupancy budgets are \$10,221,429.

- **UNM Medical Group Truman Health Services:** The current clinic located at 800 Encino expanded into four additional suites to allow for the renovation of the two-story clinic in Bldg. F. The expansion suites were completed in 2015. The clinic renovations will be complete by December 21, 2015 and will double the number of exam, behavior health, and treatment rooms.
- **Novitski Dental Clinic:** The clinic was developed for the special needs program previously housed at Carrie Tingley Hospital, and affected the Dental Hygiene education program. Substantial completion was reached September 3, 2015 and met all Hygiene education requirements. The relocation accommodates three operatory chairs as well as enhancements to the Hygiene program in support of the recertification requirements.
- **BRF 138A Project- Pediatrics:** Construction Substantial Completion was attained on June 23, 2014. This \$74,705, 504 NSF project renovated Room BRF 138A into a new wet lab for pediatrics research. Project completion was August 2014.
- **College of Pharmacy, B23/B85 Offices:** Design commenced in June 2015. This \$83,500 project renovates rooms B23 and B85, 506 NSF, in the College of Pharmacy to provide additional office space for graduate students. Construction is scheduled to be completed in August 2015.
- **College of Pharmacy, B27 Offices:** Design commenced in June 2015. This \$63,000 project renovates room B27A, 265 NSF, in the College of Pharmacy to provide additional office space for graduate students. Construction is scheduled to be completed in August 2015.
- **School of Medicine Faculty Memorial:** Project to provide an outdoor memorial to honor deceased School of Medicine Faculty. Design options are being evaluated.
- **IDTC 3rd Floor Internal Medicine Labs:** This \$507,147, 2,315 NSF project completed the build out of the remaining shell space on this floor and contains research labs. Construction was completed in December, 2014.
- **SURGE Nursing & Pharmacy Clinical Trials and Code Upgrades:** Construction started in February, 2014. Construction Substantial Completion was attained on December 5, 2014.
- **BRF Anesthesiology Lab Renovations, G38, G38A, G40, G40A:** This \$295,817, 1,330 SF project incorporates collaborations between UNM Radio Pharmacy, UNM Anesthesiology and Invicro. Construction was completed January 2015.
- **College of Pharmacy, B39 Offices:** This \$201,014 project converted a former 915 NSF office/meeting room space into faculty offices. Construction was completed March 2015.
- **College of Pharmacy, B23/B85 Offices:** Design commenced in June 2015. This \$83,500 project renovates rooms B23 and B85, 506 NSF, in the College of Pharmacy to provide additional office space for graduate students. Construction is scheduled to be completed in mid-August 2015.
- **College of Pharmacy, B27 Offices:** Design commenced in June 2015. This \$63,000 project renovates room B27A, 265 NSF, in the College of Pharmacy to provide additional office space for graduate students. Construction is scheduled to be completed in mid-August 2015.
- **Molecular Genetics Cobre Grant Support:** NIH grant support for two scientific cores and one administrative core. Total project if funds awarded is 1,336 s.f. and the budget is anticipated to be \$298,000.
- **HSC Animal Resource Facility Improvements:** This 1,660 s.f. project renovates four animal holding rooms to accommodate new ventilated cage racks. Two procedure rooms will also

receive minor upgrades to include new casework. Budget is \$490,983 and construction is scheduled to complete in October 2015.

- **1650 University 3rd Floor Call Center Expansion:** This 1,831 nsf project will renovate vacated space to support an expanded call center operation for the UNMH Ambulatory Business Operations Center. The budget is \$193,450. Design completed in May, 2015. Construction will complete in September 2015.

Zone 3 – South Campus (Athletics, Science & Technology Park, Mesa del Sol)

Projects of interest completed and occupied during 2014/2015:

- | | | |
|--|-----------|------------|
| • Baseball Restrooms | \$290,000 | 1,200 s.f. |
| • MITTC 2 nd Chiller Installation | \$131,000 | 200 s.f. |
| • Championship Golf Course Pavilion HVAC Replacement | \$45,000 | 6,500 sf. |

Projects of interest in progress during 2014/2015:

- **CHTM:** Scope of work brings two classrooms to UNM technology standards tier one and tier two. Project is 1,857 s.f. and the budget is \$64,758.

Zone 4 – Branch Campuses (Rio Rancho / Valencia / Gallup / Los Alamos / Taos)

Projects of interest completed and occupied during 2014/2015:

UNM Los Alamos Campus

- **UNM Los Alamos Science Labs Project:** This 2,142 s.f. \$750,000 project included the renovation of two lab classrooms and the chemical storage room, as well as HVAC upgrades. Construction began in late May 2014 and concluded August 7, 2014.

Projects of interest in progress during 2014/2015:

- **UNM Los Alamos Emergency Medicine Classrooms:** Project budget is \$625,000. Scope includes the renovation of a lab classroom and training area in Building 6 of approximately 2,416 g.s.f. The scope of work includes developing drainage for the north western exterior of Building 6 and repairing walls that have water damage. The construction period is scheduled for January through June of 2016.

UNM Gallup Campus

- **Zollinger Library- Completion of Shell Space:** This \$1,350,000, 3,885 s.f. project will complete tenant improvement work on the Zollinger Library lower level to create areas for library stacks, restrooms, and small and large group study rooms. Reconfigure a section of the upper floor to incorporate a learning commons and reference desk. Upgrade aging and trouble-

prone major infrastructure components and install a new elevator and stairwell. Programming was completed in May of 2015. Design work is scheduled to start September 2015.

- **Gallup Center for Career Technology and Education, Ph 1:** This project is currently in pre-planning activities (\$350,000) for the Center for Career Technology and Education, to support a November 2016 anticipated bond vote for a new 13,000 s.f. construction technologies building that will include construction tech, woodworking, HVAC/mechanical instrumentation technologies, drafting/pre-engineering and sustainability design and construction technologies labs and classrooms for student jobs training in the growing sustainable construction and green technologies industries.

UNM Taos Campus

Significant projects completed and occupied during 2014/2015:

• Taos Drainage Projects	\$94,525	N/A
• Taos Portable Classroom & Infrastructure	\$268,000	2,800 s.f.
• Taos Site Demolition and Utility Relocations	\$101,000	N/A
• UNM Taos Core Student Success Center	\$3,688,000	14,890 s.f.
• Harwood Museum Exterior Improvements and Entrance Repairs	\$366,000	N/A

Project Highlights (In Progress):

- **UNM Taos Health Careers Training Center:** This \$4,624,000 project includes renovations of the Rio Grande Hall, correction of building deficiencies, performance of deferred maintenance, and outfitting the renovated portion with furniture, fixtures and equipment for use by the Taos Campus Health Sciences Education program. Redevelopment of the Taos Civic Center is a combination of building renewal projects and a remodel of 13,369 SF of the Rio Grande Hall portion of the building to provide classrooms and labs for the full Health Sciences program with additional STEM classrooms ready for occupancy in Fall 2016.
- **UNM Taos Drainage, Landscaping and Site Lighting:** This \$701,250 project will provide and install landscaping, irrigation, concrete sidewalks, landscape pavers, drainage structures, shade structures, and site lighting on approximately 65,000 sf of area located in the central core area of the Klauer Campus and will provide new pathways to navigate the growing campus and gathering spaces for staff and students. This project will also correct existing drainage issues within this area as well as provide much needed ADA pathways between existing buildings and add site lighting along these pathways for enhanced campus safety and security. Project is anticipated to be completed by Spring 2016.

III. SUPPLEMENTAL DEVELOPMENTS

PDC Construction Services Division (CSD):

- PDC continued its efforts with the general contracting process, now known as PDC-CSD, on multiple projects as listed primarily in Zone One, notably the Zimmerman CSP Renovations completed in August 2014. This project exceeded \$1 million in size. This Division has added a

third person to the operation, which continues to run at nearly 100% capacity despite each person having additional project and construction management duties.

- PDC-CSD continued its trend of high quality service and cost savings for our customers on the project listed above as well as numerous smaller sized projects. PDC-CSD continues to provide these positive attributes since the team is able to work closely with the A/E team and stakeholders early in the design process, providing cost estimates that are accurate and allowing solution of constructability issues prior to beginning construction.
- PDC-CSD continues to provide transparency and cost savings to the projects. Change orders are not marked up and continue to be primarily at the customers' request. All savings gained through the bidding process and construction phase go back into the project and/or are returned to the customer or the funding source.
- PDC-CSD continued to support the over-all PDC income versus expense balance by achieving 11% of the overall PDC revenue source this year, as compared to 24% in FY2013/2014 and 41% in FY2012/2013. This decline in overall PDC-CSD income can be attributed to the increased number of projects in general, and the major capital projects that have returned to the campus after several years of reduced capital. This does not decrease the commitment to customer satisfaction and quality of work that continues to be provided to the customer.

PDC Interiors / Furniture, Fixtures & Equipment (FF&E) Division:

This Division is a one-person operation with design support that continues to be 'the UNM resource' for furniture scope, pricing, procurement, move implementation plans, and interior design. This Division managed \$1,851,612 in FF&E alone compared to \$674,008 in the prior fiscal year. The process continues to save projects and UNM significant dollars via a competitive RFQ procurement process. This division continues to receive more recognition since it is supporting both the former OCP GC (now CSD) and formerly PCD (now PDC) with interiors on in-house design projects and PPD Remodel with specific interiors and furniture needs. With the institution of the Intake Process, all interiors only projects and construction projects requiring FF&E/interiors expertise are assigned to this Division. Due to our recent merge, this division now appropriately reports to the University Architect.

The following is a list of FF&E specific projects and/or part of capital projects that were supported and accomplished in the last fiscal year.

- **1650 University (HSC Business & Communications Center):** \$1,191,000 FF&E, project included the challenges of working with seven different departments with specific requirements while providing furnishings by phased completion dates. In addition, designed and specified five floors of common area furnishings including break rooms, conference rooms and wait areas. Developed furnishings packages tailored to each department while keeping within budget. Responsible for move coordination for all seven departments. Provided furniture specification development, finish selection, procurement, installation, and punch oversight. Project was on schedule and on budget.
- **Alvarado Lounge:** \$14,000 FF&E PDC CSD team project provided comfortable, functional and student oriented furnishings and interiors finishes to encourage student use and brighten up this basement space. Furniture specification development, finish selection, procurement, installation and punch oversight. Project was on schedule and on budget.

- **Castetter Hall Phase 3:** \$145,000 FF&E, worked with faculty and staff through multiple designs to provide office and lab furnishings to suit the occupants and students while utilizing products and finishes also used in previous phases to provide consistency throughout. Managed procurement, installation and punch list items on time and on budget.
- **Controller's Office:** \$7,712 FF&E, worked closely with UNM Controller and staff to design and update the Controller's office to improve functionality of space including desk and conference spaces. Product specification development, finish selection, procurement, installation, and punch oversight. Project was on schedule and on budget.
- **Faculty & Staff Phase 2:** \$10,000 FF&E, worked with club manager to further develop the updated image of the club including console/shelving for service area, artwork, conference room furniture, paint, rug, window coverings, and accessories. Product specification development, finish selection, procurement, installation, and punch oversight. Project was on schedule and on budget.
- **Hokona Hall Restrooms:** PDC CSD team project. Updated and refreshed old and unappealing restrooms. Designed and specified tile pattern and finishes to coordinate with Hokona Hall Game Room/Ballroom project and in keeping with the era of the building.
- **Institutional Analytics:** \$15,000 FF&E, at the request of the Provost Office, worked with the Office of Institutional Analytics to provide additional furnishings to existing staff moving into Building 20A and Director's office at Scholes Hall to make functional for occupants. Also provided new signs and oversight on Surplus removal. Managed procurement, installation, and punch list items on time and on budget.
- **President's Conference Room:** \$4,500 FF&E, worked with President's staff to turn an unused office into a private conference room for President Frank. Included specification of products, order oversight, removal of existing to Surplus, and interiors finishes coordination. On schedule and budget.
- **Stem Collaborative Center Furniture:** \$16,300 FF&E, worked closely with Director to develop functional furnishings for staff and support of students in this new center which included office and work stations in addition to a multi-functional collaborative classroom. Coordinated surplus removal with College of Education. Provided product specification, interiors finishes coordination, managed procurement, installation, and punch oversight on time and within budget.
- **University Libraries Staff Furniture Project:** \$149,100 FF&E provided a considerable update to furnishings for 23 staff and six offices in Zimmerman Library (new student commons support/adjacency) and 11 offices at Centennial Engineering & Engineering Library (CEEL). Zimmerman space included modular furniture, lockers, mobile whiteboards, and interiors finishes including paint to coordinate with new commons. In addition, provided design and product selection for Library IT Services space. Project included furniture specification development, finish selection, interiors finishes coordination, procurement, installation, and punch oversight. Project was on schedule and on budget.
- **Zimmerman Library Student Learning Commons:** \$299,000 FF&E, developed a furnishings and interiors finishes package based on in-depth programming with project committee. Created a badly needed updated and vibrant learning commons that included triple the amount of previously existing seating, functional computer stations, and group collaboration areas selecting various styles of furniture and finishes that has appealed to the student population and increased use of the space. Project management included programming, product specification, interiors finishes coordination, procurement management, installation, and punch oversight on budget.

IV. FUTURE PLANS

- Develop strategic plans for increasing effective development of UNM campuses.
- Develop strategic PDC management of services and delivery to clients.
- Projects to be executed:
 1. Farris Engineering
 2. Anderson School of Management
 3. Physics & Astronomy Interdisciplinary Science
 4. Johnson Center Expansion & Renewal
 5. Farris Engineering (east side and deck landscape)
 6. 'Dr. Karen Abraham Courtyard'
 7. Smith Plaza Renovation (early planning and data gathering)
 8. Helix Garden Phase 2
 9. Lily Lane Phase 2
- 'Environs Plan' (continued work toward approval for 'Master Plan Update')
- Landscape Master Plan (Main Campus)
- Arboretum Tour (brochures and signage for tours 2 and 3)
- Implement policy and standards for Universal Restrooms on campus
- Update campus exterior signage standards
- Revision of the PDC Client Survey
- Creation of merged PDC website
- Completion of PDC space and final component of the merge

V. PUBLICATIONS

- UNM internal brochures on Chapel Garden, 'U' Plaza, Tight Grove, Arboretum
- Online Vimeo presentation of the 'Pit' Art Installation
- Quarterly Capital Projects Reports
- UNM's Annual Capital Outlay Requests to the Higher Education Department

VI. COMMITTEE PARTICIPATION

- Facility Access Committee
- Smoking Policy Committee
- Campus Development Advisory Committee
- Historic Preservation Committee
- Helix Garden Steering Committee
- Bicycle Friendly University Committee
- Campus Safety/Security Committee
- Museum Committee

VII. STAFF APPOINTMENTS

April 15, 2015 – Amber Straquadine promoted to Designer.

VIII. STAFF SEPARATIONS

None.

IX. OUTSIDE PROFESSIONAL ACTIVITIES OF STAFF

- **Christopher Carian, Senior Project/Construction Manager:** Licensed Architect, State of New Mexico; Certified with National Council of Architectural Registration Boards (NCARB); Certificate of Project Management; English as a Second Language (ESL) Certified Tutor; LEED Green Associate Accreditation.
- **Amy Coburn, University Architect/Director:** Licensed architect, NM, CA, MA; American Institute of Architects (AIA); Society of College & University Planners (SCUP), National Council of Architectural Registration Board (NCARB); Urban Land Institute, NM Management Committee, Chair Mission Advancement; Lambda Alpha International; UNM Committee participation: Campus Development Advisory, Historic Preservation, Museum Committee, Facility Access.
- **Maria Dion, Group Manager, Capital Projects:** LEED Green Associate accredited, Main Campus Space Allocation Committee, Member; Facility Access Committee, Member; Member of the Committee for Public Art for the PIT/University Arena renovation; US Green Building Council, Member; UNM Management Academy Graduate.
- **Mary Gauer, Group Manager, Capital Projects:** International Facility Management Association (IFMA) Certified Facility Manager Credential (International); Speaker, IFMA New Mexico Chapter, IFMA Credentials; speaker IFMA international conference, “How Great Leaders Tackle Tough Challenges and Come Out On Top”, September 18, 2014; Task Force Member IFMA Knowledge Strategy 2015; IFMA Judge, International Distinguished Member Award 2015; IFMA Fellows Judge, 2015.
- **Rick Henrard, Director:** Registered Architect; NM Licensed General Contractor; American Institute of Architects (AIA), Member; Society of College & University Planners (SCUP), Member; U.S. Green Building Council (USGBC), New Mexico Chapter, Member; Learning Environments Committee, Member; Main Campus Space Allocation Committee, Member; International Facility Management Association (IFMA) New Mexico Chapter, Member; Guest Speaker, Society for Marketing Professional Services (SMPS) and the American Subcontractors Association Monthly Meeting; UNM Management Academy Graduate.
- **Claudia Miller, Planner:** SW Region and National American Planning Association, Member; Certified Architectural Historic Preservationist; NM Land Conservancy, Board Member; The Corrales Friends of Animals Foundation, Secretary; Society of College and University Planners (SCUP), Member.

- **Suzanne Mortier, University Landscape Architect:** Full Member of the American Society of Landscape Architects, (ASLA); Member and Past Executive Committee Member of the New Mexico Chapter of ASLA; Licensing Examination Grader for the Council of Landscape Architectural Registration Boards, (CLARB); Society of College and University Planners (SCUP) Member; Past Board of Directors member for the UNM School of Architecture and Planning Alumni Association; LEED Green Associate and participant in a subject matter group formed for GBCI test items.
- **Tabia Murray Allred, Program Planning Officer:** Society of College and University Planners (SCUP), Member.
- **Michael Reid, Group Manager, Capital Projects:** Presented a discussion on capital project management to Dr. Peter Jurkat's Operations Management 720 graduate class at the Anderson School of Management. Provided assistance to Undergraduate student Larissa Garcia. Chairs monthly Joint Staff meetings. Represented PDC at functions such as the UNM Day/Legislative Reception, Santa Fe. Continues to attend educational seminars, such as Illuminating Engineering Society of North America (IESNA) Daylighting Overview, City of Albuquerque Fugitive Dust Training.
- **Sharon Rodgers, Associate Project/Construction Manager:** Completed Psychology 105, Spanish 101, Macroeconomics 105, and Greek Mythology courses towards Bachelor of Business Administration degree.
- **Antonio Sanchez, Project/Construction Manager:** Professional Development Course: "7 Habits of Highly Effective People" in Spring 2015.
- **Ben Savoca, Planner:** Working towards Master's Degree in Community and Regional Planning.
- **Brian Scharmer, Project/Construction Manager:** PMI Certified Project Manager.
- **Eric Schwaner, Senior Project/Construction Manager:** Obtained GB-98 General Contracting license in November 2014 to act as Qualifying Party for PDC-CSD; Currently in his 3rd term as President, UNM North Golf Course League. Continues to seek Career and Professional Development opportunities through seminars and workshops.
- **Amber Straquadine, Designer:** NCARB member, working toward NCARB Licensure/ Internship; Illuminating Engineering Society (IES) member; 'CAN-struction' (Roadrunner Food Bank) participant/team leader.
- **Kimberly Sylvester, Associate Project/Construction Manager:** Main Campus Space Allocation Committee, Member; Learning Environments Committee, Member.
- **John Tomaszewski, Associate Project/Construction Manager:** Member of National Institute of Building Sciences, buildingSMART alliance, buildingSMART International, buildingSMART Canada, International Alliance on Interoperability, bimSMART Foundation, 505 BIM User Group. Attended Autodesk University (conference) and spoke at the bSf BIM Summit.

Appendix I



FY 2014-2015 Annual Report

Popejoy Hall

Submitted by:

Thomas Tkach, Director

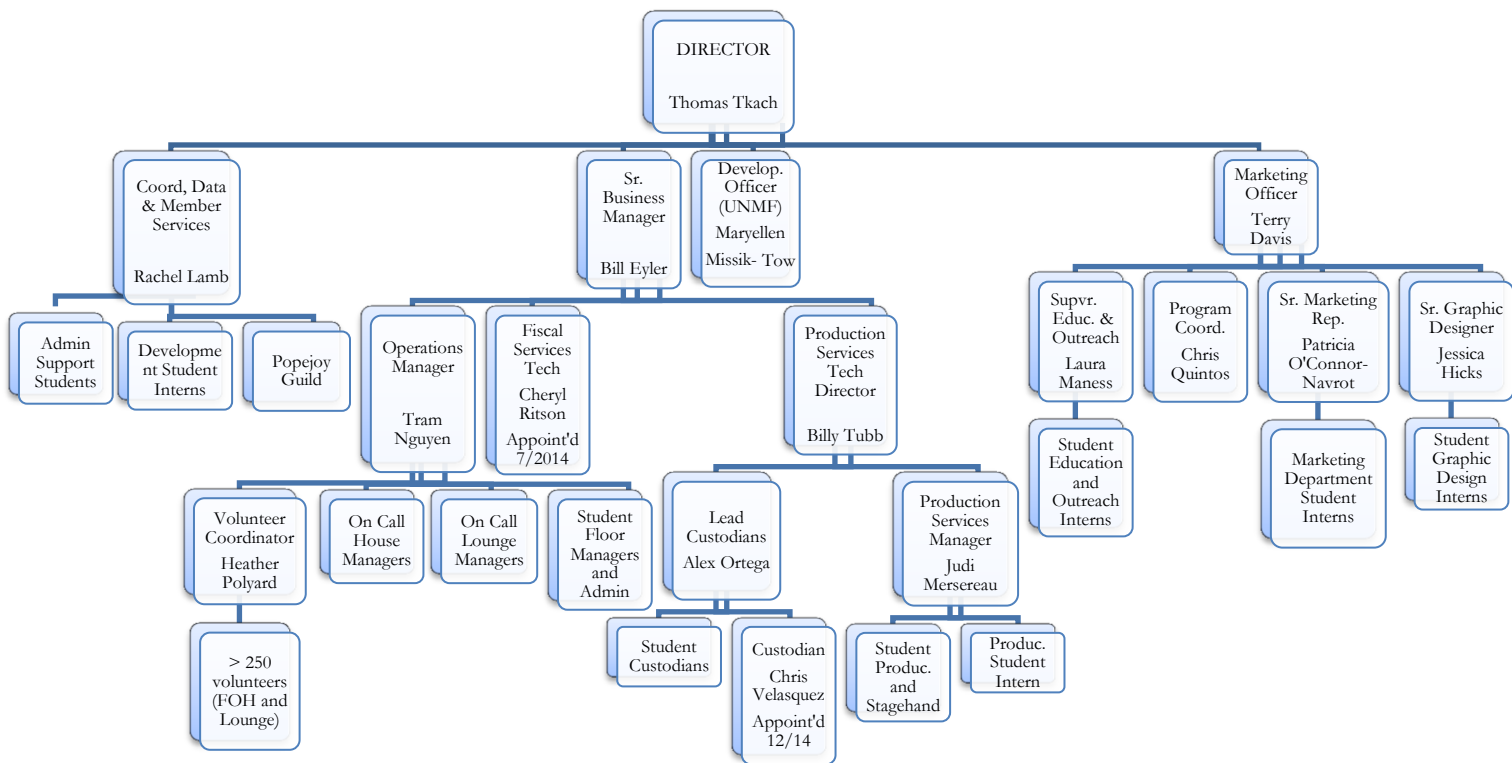
<http://www.popejoypresents.com>

Mission and Vision

Popejoy Hall’s mission is to make the performing arts accessible to all New Mexicans with a vision of creating an exceptional experience for artists and audiences alike by maintaining a state-of-the-art performing arts center; attracting the best touring arts to our community.

Organizational Chart

2014-2015 UNM Public Events/Popejoy Hall



2014-2015 Annual Report

Table of Contents

I.	Executive Summary	99
II.	Significant Accomplishments	99
III.	Current Projects	107
IV.	Future Plans/Goals FY15-16	107
V.	Department/Staffing Information	108
VI.	Appendix A: Popejoy Hall Case Statement	109
VII.	Appendix B: Feasibility Study Questionnaire	114

I. EXECUTIVE SUMMARY

Popejoy Hall's 49th season was highlighted by a truly unique experience for its patrons with the return of *Wicked*. A sampling of additional popular programs included: *Dr. Seuss' How the Grinch Stole Christmas*, *Million Dollar Quartet*, *The World of Downton Abbey: Jessica Fellowes*, and *Mark Twain Tonight!* With 79 performances total, more than 127,000 patrons attended Popejoy Hall's Broadway and Ovation Series shows throughout the year. Additionally, 18 educational programs were attended by more than 58,000 schoolchildren.

Popejoy's financial stability continues to be dependent upon both earned revenue from ticket sales and contributed income from both individuals and local businesses. Earned revenue from ticket sales continues to be the largest contributor towards Popejoy's financial stability totaling \$7,548,990 and contributed revenue totaled \$1,507,680, including a planned estate gift for \$500,000 and a capital pledge for \$250,000 from Margaret & Turner Branch.

The budget for every season varies depending on the number and length of Broadway presentations. Each performance comes with its own unique costs: artist fees, marketing, and labor expenses. Popejoy's fixed overhead expenses are around \$1,500,000. The total budget ranges from \$5 and \$10 million.

Finally, Popejoy continues to operate with a relatively small staff for a theater of its size, this year having had two appointments to our staff, and employed a total of 16 full time staff members during the FY2014-2015. In addition to full time staff members, Popejoy employs several on-call staff members and approximately 50 student employees throughout its departments.

II. SIGNIFICANT ACCOMPLISHMENTS

Popejoy Hall presented 102 productions totaling 187 performances. Additionally, the annual "A Taste of Broadway" gala was a wonderful success with more than 520 attendees.

Popejoy conducted a feasibility study to determine the scope of capital improvements that could be funded during the next five years. The study included interviewing donors and community leaders to get insight into their thoughts about Popejoy and the proposed capital improvements.

As part of this study, Margaret and Turner Branch stepped forward and pledged to fund the Benefactors Lounge addition which was completed this past June. The study also indicated that there was enough public support to go forth with the renovation of the lower level public lounge, the balcony public lounge, and the artist support facilities.

Events July 1, 2014 - June 30, 2015**Popejoy Presents: Broadway in New Mexico**

Wicked	Sept. 17-October 5, 2014 (24 performances)
Dr. Seuss' How the Grinch Stole Christmas	November 11-26, 2014 (10 performances)
Chicago	January 15-18, 2015 (6 performances)
Blue Man Group	February 5-7, 2015 (3 performances)
Camelot	March 19-22, 2015 (6 performances)
Mamma Mia!	April 10-11, 2015 (3 performances)
Million Dollar Quartet	June 4-7, 2015 (6 performances)

Popejoy Presents: Ovation Series

Over the Rainbow: A Tribute to Judy Garland	October 15, 2014
Abba Mania	October 26, 2014
The Manhattan Transfer	November 2, 2014
Pilobolus	November 7, 2014
Wuthering Heights	November 9, 2014
Mariachi Christmas	December 13, 2014
The Kingston Trio Christmas	December 14, 2014
An Irish Christmas	December 19, 2014
The Sleeping Beauty	January 29, 2015
Cirque Zuma Zuma	January 30, 2015
The World of Downton Abbey: Jessica Fellowes	February 8, 2015
Canadian Brass	February 21, 2015
Reinventing Radio: An Afternoon with Ira Glass	March 8, 2015
Stormy Weather	March 14, 2015

H.M.S Pinafore	March 15, 2015
Legends of Irish Dance	March 17, 2015
Mark Twain Tonight!	March 27, 2015
The Hit Men	March 29, 2015
A Midsummer Night's Dream	April 19, 2015
Martha Graham Dance Company	April 25, 2015
David Sedaris	May 9, 2015

Schoolltime Series

Letters Home	October 27, 2014 (2 performances)
The Berenstain Bears LIVE! In Family Matters	October 28, 2014 (2 performances)
Pilobolus presents Rules @ Play	November 7, 2014 (1 full length performance)
The Adventures of Robin Hood	November 18, 2014 (2 performances)
Highlights of the Nutcracker Ballet	December 1 & 2, 2014 (3 performances)
Doctor Kaboom! The Science of Santa	December 9, 2014 (1 full length performance)
Mariachi Christmas	December 15, 2014 (2 performances)
Schoolhouse Rock Live!	January 12, 2015 (2 performances)
The Musical Adventures of Flat Stanley	January 27, 2015 (2 performances)
Cirque Zuma Zuma	January 30, 2015 (2 performances)
Paige In Full: A B-Girl's Visual Mix Tape	February 10, 2015 (2 performances)
Lilly's Purple Plastic Purse	February 12, 2015 (2 performances)
The Teacher from the Black Lagoon	February 24, 2015 (2 performances)
The Banana Slug String Band-A Penguin in Paradise	March 10, 2015 (2 performances)
The Smoke and Mystery Tour	March 24, 2015 (2 performances)
DiNO-Light	April 7, 2015 (2 performances)

A Midsummer Night's Dream	April 20, 2015 (1 full length performance)
Treasure Island	April 21, 2015 (2 performances)

Senior Shows (Included in Ovation & Schooltime Series Shows)

Over the Rainbow: A Tribute to Judy Garland	October 15, 2014
Abba Mania	October 26, 2014
Letters Home	October 27, 2014 (2 performances)
The Manhattan Transfer	November 2, 2014
Pilobolus	November 7, 2014
Wuthering Heights	November 9, 2014
Mariachi Christmas	December 13, 2014
The Kingston Trio Christmas	December 14, 2014
The Sleeping Beauty	January 29, 2015
Cirque Zuma Zuma	January 30, 2015
The World of Downton Abbey: Jessica Fellowes	February 8, 2015
Canadian Brass	February 21, 2015
Reinventing Radio: An Afternoon with Ira Glass	March 8, 2015
Stormy Weather	March 14, 2015
H.M.S Pinafore	March 15, 2015
The Hit Men	March 29, 2015
A Midsummer Night's Dream	April 19, 2015
Martha Graham Dance Company	April 25, 2015
David Sedaris	May 9, 2015

Resident Events**New Mexico Philharmonic**

Classics I	October 11, 2014
Youth Concerts	October 21 & 23, 2014 (4 performances)
Pops I	October 25, 2014
Classics II	November 1, 2014
Pops II	November 8, 2014
Classics III	November 22, 2014
Pops III	December 20, 2014
Classics IV	January 24, 2015
Pops IV	February 14, 2015
Classics V	February 28, 2015
Special Event: Live Ballet	March 7, 2015
Classics VI	March 28, 2015
Pops V	April 4, 2015
Classics VII	April 18, 2015
Youth Concerts	May 12-14, 2015 (6 performances)

UNM Music Department

Orchestra	October 14, 2014
Jazz & Symphonic Bands	October 6, 2014
Albuquerque Youth Symphony	October 19, 2014
Wind	October 22, 2014
Chorus	November 20, 2014
Wind	November 21, 2014

Albuquerque Youth Symphony	February 1, 2015
Wind	February 11, 2015
Symphonic Band	February 18, 2015
Wind Symphony	March 23, 2015
Orchestra	March 31, 2015
Symphonic Band	April 1, 2015
Orchestra & Chorus	April 28, 2015
Wind Symphony	April 29, 2015
Wind Symphony Recording	May 1, 2015
Albuquerque Youth Symphony	May 3, 2015
AYS Anniversary Alumni Concert	May 24, 2015

UNM Additional Department Rentals

Mariachi Spectacular	July 9, 2014
White Coat Ceremony	August 14, 2014
President's Office/Freshman Family Day	August 17, 2014
TEDxABQ	September 6, 2014
Senior Day	October 18, 2014
DECA	January 6, 2015
All State	January 7-10, 2015 (4 performances)
UNM SEE presents: Jack White	February 3, 2015
Student Activity Center/Greek Sing	February 23, 2015
WAKE Christian Concert	April 22, 2015
College of Fine Arts Graduation	May 7, 2015
Psychology Graduation	May 8, 2015

Public Events/Popejoy Hall

Yelp! Tour	December 8, 2015
Volunteer Winter Party	January 11, 2015
Gotta Dance! Bill Miller Lecture	January 25, 2015
Board of Directors Meeting on Stage	February 26, 2015
Video Interview in Hall for Popejoy Documentary	May 6, 2015
Volunteer Social	June 27, 2015

Outside Rentals

The Nutcracker Ballet	Nov. 29-30, Dec. 6-7, 2014 (5 performances)
NMS Choir	December 12, 2014
Fishback Dance Studios	May 22 & 23, 2015 (3 performances)
Dance Dimensions	May 30, 2015 (2 performances)
ALS Promotions: Dr. Lozano	June 12, 2015
Live Nation: MOVE Live	June 13, 2015

Popejoy—Facility Use during FY14-15**General Hall Usage Statistics:**

Total number of UNM Department events	29
Total number of UNM Department performances	32
Total number of events in venue	102
Total number of performances in venue	187
Total number in attendance	261,561

Total number of days with performances/rehearsals	172
Total number days for technical requirements	82
Total number of “dark” days with no activity	111

UNMPE Presentations/Popejoy Presents

Total number of Popejoy Presents events	28
Total number of Popejoy Presents performances	79
Total number of Popejoy Presents patrons	127,138
Average number in attendance per performance	1,609

Schooltime Series Productions

Total number of events	18
Total number of performances	34
Total number of attendance	58,613
Average numbers in attendance per performance	1,724

Popejoy Hall Rentals: NM Philharmonic/Outside

Total number of events/NM Philharmonic	15
Total number of performances/NM Philharmonic	23
Total number attending/NM Philharmonic	31,860
Average number attending per performance/NM Philharmonic	1,385
Total number of events/Outside	6
Total number of performances/Outside	13
Total number attending/Outside	19,085
Average number attending/Outside	1,468

UNM Department Usage, Including UNM's Music Dept

Total number of events	29
Total number of performances	32
Total number attending	39,761
Average number per performance	1,243

III. CURRENT PROJECTS**Benefactors' Lounge Expansion (Main Floor) (naming opportunity)**

Popejoy secured a major capital gift from Margaret & Turner Branch to complete construction on the Benefactors' Lounge Expansion. Now named the Margaret & Turner Branch Benefactors' Lounge, the lounge provides a valuable source of contributed revenue through lounge memberships that help Popejoy to remain fiscally balanced. The lounge program continues to gain popularity with the expansion and gained new interest due to the new face of the building.

Popejoy Hall Feasibility Study & Capital Campaign

Popejoy undertook a feasibility study for its capital campaign, including interviews with community leaders and Popejoy donors. The results of the study indicate that Popejoy can move forward with three main projects: Improved lower lobby and public lounges, improved balcony lobby and public lounges, and upgraded artists' facilities.

Please see Appendix A: *Popejoy Hall Case Statement* and Appendix B: *Feasibility Study Questionnaire*

IV. FUTURE PLANS/GOALS FY15-16**Improved Lower Lobby and Public Lounge \$642,000**

The lower lobby lounge is in poor condition. These facilities are heavily utilized. They often leave a negative impression on our patrons. This area would be renovated and expanded to function as a patron lounge, providing an excellent entertainment space for public and corporate events. This renovation would include the addition of nine women's restrooms, two men's restrooms, and two universal restrooms.

Improved Balcony Lobby and Public Lounge \$198,000

The upper lobby is in as poor condition as the lower lobby. These facilities leave a negative impression on our patrons.

Artist Facilities**\$552,000**

The existing dressing rooms have never been remodeled. They are in very poor condition. Stars and first class performers from all over the world use these facilities. If updated, they would greatly enhance the artists' experience at Popejoy.

V. DEPARTMENT/STAFFING INFORMATION**Appointments:**

Cheryl Ritson	Fiscal Services Tech
Chris Velasquez	Custodian

Separations:

None

Current Full Time Staff

Thomas Tkach	Director
Terry Davis	Marketing Officer
William Eyer	Sr. Business Manager
Jessica Hicks	Sr. Graphic Designer
Rachel Lamb	Coord., Data & Member Services
Laura Maness	Supervisor, Education & Outreach Programs
Judi Mersereau	Production Services Manager
Maryellen Missik-Tow	Development Director
Tram Nguyen	Operations Manager
Patricia O'Connor	Sr. Marketing Representative
Alex Ortega	Lead Custodian
Heather Polyard	Volunteer Coordinator
Chris Quintos	Program Coordinator
Cheryl Ritson	Fiscal Services Tech
Billy Tubb	Technical Director

Chris Velasquez	Custodian
Current On Call Staff	
David Bentley	House Manager Associate
Brian Colburn	House Manager Associate
Rosemarie DeLeo	House Manager Associate
Michael Gaba	House Manager Associate – Lounge Mngr
Kisa King	Assistant House Manager Associate
Hannah Peceny	House Manager Associate
Herb Wright	House Manager Associate

Volunteer Information

Total number of volunteers FY 14-15:	280
Total number of volunteer hours donated FY 14-15:	25,600

VI. APPENDIX A: POPEJOY HALL CASE STATEMENT**Popejoy Hall****University Founded ~ Community Funded****Case Statement****Background**

As the flagship performing arts center in New Mexico, UNM's Popejoy Hall is critical to the vitality of arts and culture throughout the state. Popejoy Hall also provides a venue for local and traveling performing arts presentations, including the New Mexico Philharmonic. Since 1999, Popejoy's Broadway Series has continually strengthened visibility of the performance hall and increased ticket sells.

Popejoy's ability to draw quality performances to New Mexico benefits the state as a whole. With 228,000 attendees annually, the economic impact of revenue generated by Popejoy extends far beyond the Hall.

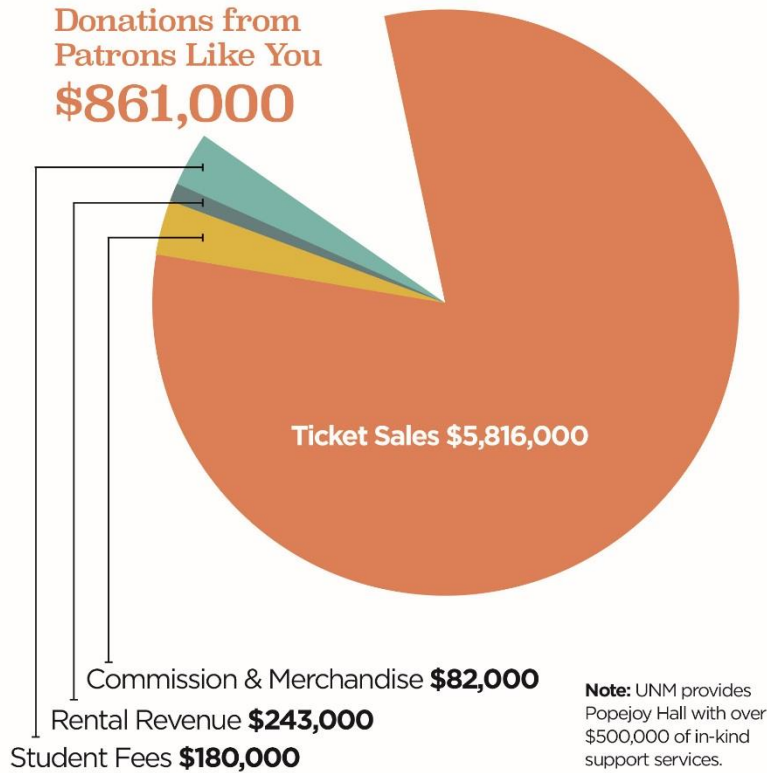
Popejoy Hall was founded by the University of New Mexico in 1966. It will celebrate its 50th Anniversary next year. Initially, the venue was entirely funded by the State of New Mexico. This changed in the late 1980s when the Legislature eliminated this funding source. Since then Popejoy Hall has been classified as an auxiliary enterprise within UNM. This means it is a *self-funded business operation*. In simpler terms, Popejoy must raise the majority of funds needed to operate. The chart below shows the source of funds that make up the operating budget.

Budget

Every season is different. Every performance comes with its own unique costs: artist fees, marketing and labor expenses. Popejoy’s fixed overhead expenses are around \$1,500,000. The total budget ranges from \$5 and \$10 million. Revenue fluctuates depending on the show lineup, especially with touring shows. Revenue and gross ticket revenue from multi-week Broadway runs vary considerably.

Popejoy Hall Sources of Revenue

Fiscal Year 15/16



Vision

Popejoy Hall's vision is: To provide an exceptional experience for audiences and artists alike by creating a *state-of-the-art facility* in order to attract the best performing artists to the region.

Popejoy Hall is an aging facility. To establish Popejoy Hall, and therefore UNM, as providing the flagship performing arts venue in the Southwest, will require a capital fundraising campaign. Popejoy is proposing a number of facility improvements (listed at the end of this document) which will attract great shows and improve the experience of both performers (dressing rooms) and audiences (social gathering places).

Successes

In the past few years, Popejoy has successfully increased attendance among all New Mexicans by virtue of its fundraising efforts. Through its Schooltime Series, more than 58,000 children attend live performances annually. Through ticket subsidization, attendance among other special populations has been increased.

With funds contributed by private donors, Popejoy Hall created the Benefactors' Lounge where patrons convene to socialize prior to a show and during intermission.

Public Myths

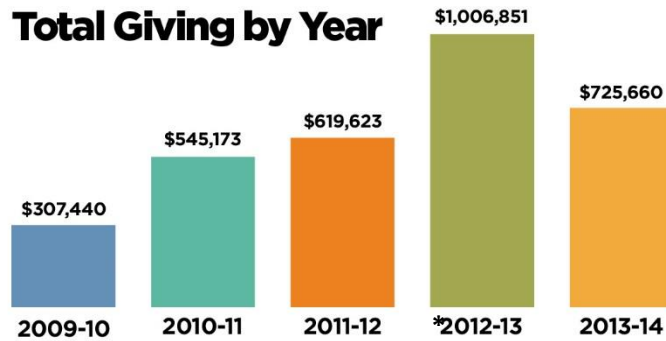
Many people in New Mexico, including community, business and government leaders, *mistakenly believe* Popejoy Hall is, in large part, funded by UNM. Others believe it is supported by the State. Many people also mistakenly believe that ticket revenue from Broadway shows are making Popejoy rich.

These misconceptions detract from Popejoy Hall's ability to raise private funds.

In reality, Popejoy only retains 5% to 6% of the gross revenue generated by a touring Broadway show.

Fundraising

In 2001, Popejoy initiated a development program to secure private donations to replace the loss of state funding and to minimize increases to ticket prices. During the fiscal year 2013/14 private donations to Popejoy exceeded \$700,000.



* 2012-2013 giving included a \$300,000 one-time estate gift.

With the need for significant capital improvements to an aging facility, Popejoy is seeking to substantially increase private donations.

Prospective Popejoy Hall Improvements

Below are the prospective projects for which Popejoy Hall is seeking private donations. Cost estimates are based on a 2013 assessment. Improvements include upgrades in public accommodations.

Main Level Benefactors' Lounge Expansion (*Naming Opportunity*) **\$450,000**

Membership in the Benefactors' Lounge provides a valuable source of private funds that help Popejoy balance its budget. The lounge program's popularity has led to an increase in contributions, allowing more people access to the lounge. This has pushed the lounge's footprint to its limits. A proposed 688 foot addition would greatly alleviate the current crowded conditions and enhance the theater experience for Popejoy's benefactors.

Lower Lounge/Lobby Renovation (*Naming Opportunity*) **\$650,000**

The lower lobby lounge is in poor condition. These facilities are heavily utilized. They often leave a negative impression on our patrons. This area would be renovated and expanded to function as a patron lounge, providing an excellent entertainment space for public and corporate events. This renovation would include the addition of nine women's restrooms, two men's restrooms, and two universal restrooms.

Artist Dressing Rooms and Green Room (*Naming Opportunity*) **\$525,000**

The existing dressing rooms have never been remodeled. They are in very poor condition. Stars and first class performers from all over the world use these facilities. If updated, they would greatly enhance the artists' experience at Popejoy.

Theater Lobby including Mezzanine and Upper Lobby (*Naming Opportunity*) **\$690,000**

The upper lobby is in as poor condition as the lower lobby. These facilities leave a negative impression on our patrons.

East Fine Arts Entrance Façade and Main Level Lobby Renovation & Addition of Public Facilities (*Naming Opportunity*) **\$2,285,000**

The current exterior of Popejoy Hall poorly reflects the excitement, energy and art occurring within its walls. Popejoy needs a facelift to reflect the world-renowned live performances it provides. This renovation would allow the main level lobby to accommodate the large number of patrons that utilize the space prior to performances and during intermission. It would also include glass partitions between the inner lobby and outer, public lobby. This will further secure Popejoy's spaces and allow for more flexibility in storing production inventory, etc.

Stage House Expansion-Proscenium Reconfiguration/Backstage Renovation: \$2,900,000

Popejoy Hall was originally built as a concert hall. As a concert hall, the backstage and associated work areas were not designed to handle the large touring shows hosted today. The depth of the stage house has delayed or prevented many touring Broadway shows from performing at Popejoy. There is also a serious lack of storage space. This requires costly temporary structures to be built to accommodate shows like Disney's *The Lion King*. The stage house expansion would include new rehearsal space, production offices, support areas, and possibly a new public café on the Southeast corner of Popejoy Hall.

Addition of Box Seats to Popejoy Hall: \$2,650,000

An exciting dream of Popejoy Hall is to add six to twelve Box Seats along its perimeter. This would greatly enhance the aesthetic appeal of the interior of the hall. It would also add 36-120 seats. The addition of Box Seats would be contingent on the stage house expansion-proscenium reconfiguration referenced earlier.

VII. APPENDIX B: FEASIBILITY STUDY QUESTIONNAIRE

CONFIDENTIAL

Date:

Interviewee:

Relationship:

Interviewer:

Popejoy Hall leadership is developing plans to pursue its first comprehensive capital giving campaign. This Feasibility Study is being conducted to assess community support for this proposed campaign.

1. Please share with me what you believe makes Popejoy Hall a unique and special place in the community.

For the questions below that use a 5 point scale, 5 represents the most favorable rating and 1 represents the least favorable rating.

2. Popejoy Hall wants to provide an exceptional experience for audiences and artists alike by maintaining a state-of-the-art facility in order to attract the best performing artists to the southwest. Please rate the degree to which you support this goal.

Strongly

Do Not

Support

Support

5 4 3..... 2..... 1

Comments:

3. Popejoy Hall set a goal of making the performing arts accessible to all New Mexicans. How would you rate Popejoy for achieving this goal?

Very

Not At All

Effective

Effective

5 4 3..... 2..... 1

4. In advance of this interview, you were provided a Preliminary Campaign Case Statement. How effectively do you feel the Case Statement explains Popejoy Hall’s financial needs and goals?

Very

Not At All

Effective

Effective

5 4 3..... 2..... 1

- 8. Benefactors' Lounge Expansion
(naming opportunity) \$ 450,000.....5 4 3.....2 1

- 9. Corporate Benefactor Lounge/Facilities
Renovation—Popejoy Lower Lobby

(naming opportunity) \$ 500,000.....5 4 3.....2 1

- 10. Artist and Chorus Dressing Rooms and
Green Room renovations (naming

opportunity) \$ 525,0005 4 3.....2 1

- 11. Theater Main Lobby, Mezzanine
and Upper Lobby renovation

(naming opportunity) \$ 690,000.....5 4 3.....2 1

- 12. East Fine Arts Entrance Façade and
Main Lobby Renovations and addition

(naming opportunity) \$ 2,285,000.....5 4 3.....2 1

- 13. Stage House Expansion and
Reconfiguration/Backstage Renovation

\$ 2,900,000.....5 4 3.....2 1

14. Addition of Box Seats to Popejoy Hall
 \$ 2,650,000.....5..... 4 3.....2..... 1

15. Currently, Popejoy Hall has approximately 225 annual donors whose contributions range from \$1,500 to \$15,000. We will need to identify ways to encourage larger donations from our annual donors and identify new friends and major donor prospects in order to secure the philanthropic support necessary to have a successful campaign. From your perspective, who would have the financial capacity to make large donations to Popejoy over the next five years?

16. Two seasons ago, Popejoy raised the donation amount that allows access to the exclusive Benefactors' Lounge from \$1,000 to \$1,500. How would you rate the current giving amount?

Too Low

Just Right

Too High

17. Among all of the charitable organizations that you support financially, where does Popejoy Hall rank?

Top priority

Top two

Top three

Top five

Top ten

Not in my top ten

18. What charitable organization that you support do you consider to be your top priority?

19. The gift pyramid below provides an example of the number of gifts that will be required to meet a campaign effort of \$10 million. If we at Popejoy decide to pursue this major undertaking, where on this scale of gifts would you see yourself participating with an outright pledge or gift - with up to five years to complete the gift?

Contribution Level	# of Contributions Needed	Total	Prospects needed
\$1,000,000	3	\$3,000,000	12
\$500,000	3	\$1,500,000	12
\$250,000	2	\$500,000	8
\$100,000	10	\$1,000,000	40
\$50,000	20	\$1,000,000	80
\$25,000	25	\$625,000	100
\$15,000	50	\$750,000	200
\$10,000	70	\$700,000	280
\$5,000	90	\$450,000	360
\$2,500	134	\$335,000	536
\$1,000	140	\$140,000	560
Total	547	\$10,000,000	218

20. Thinking of your estate planning, have you considered making a gift to Popejoy? If yes, would you like more information from Popejoy to assist you with this?

Yes

No

21. As we conclude this interview, please share with me any other thoughts you have which might be helpful to us as we prepare to implement this major campaign effort for the future of Popejoy Hall.

22. Every institution has areas where improvement is needed. What areas of weakness do you see at Popejoy Hall?

23. Do you have any fun stories or cherished memories of Popejoy experiences you'd like to share?

24. At the conclusion of our study, we will be compiling a report with the results. We would like to list you as a participant in the study, though your responses will remain confidential. Do we have your permission to list your name in the report?

Appendix J



FY 2014-2015 Annual Report

Residence Life & Student Housing

Submitted by:

Wayne Sullivan, Director

<http://housing.unm.edu>

Mission and Vision

Mission

To foster inclusive, community-based living environments consciously designed for our residents' personal growth and academic success in well-maintained facilities.

Our Values

Quality

Through continuous evaluation and student feedback, UNM Residence Life and Student Housing seeks to meet a high standard of excellence within our facilities, services, and processes.

Caring

UNM Residence Life and Student Housing strives to create an environment of success for every individual resident. All our student and professional staff members are highly trained and compassionate individuals who help residents connect to campus resources, personalize their housing experience, and achieve personal and academic goals.

Learning

The UNM residence halls are an extension of the collegiate academic environment. We believe that by living on campus, residents have the opportunity to learn and grow beyond the classroom. The programs, activities, and initiatives within our residence halls aim to develop residents into well-rounded individuals.

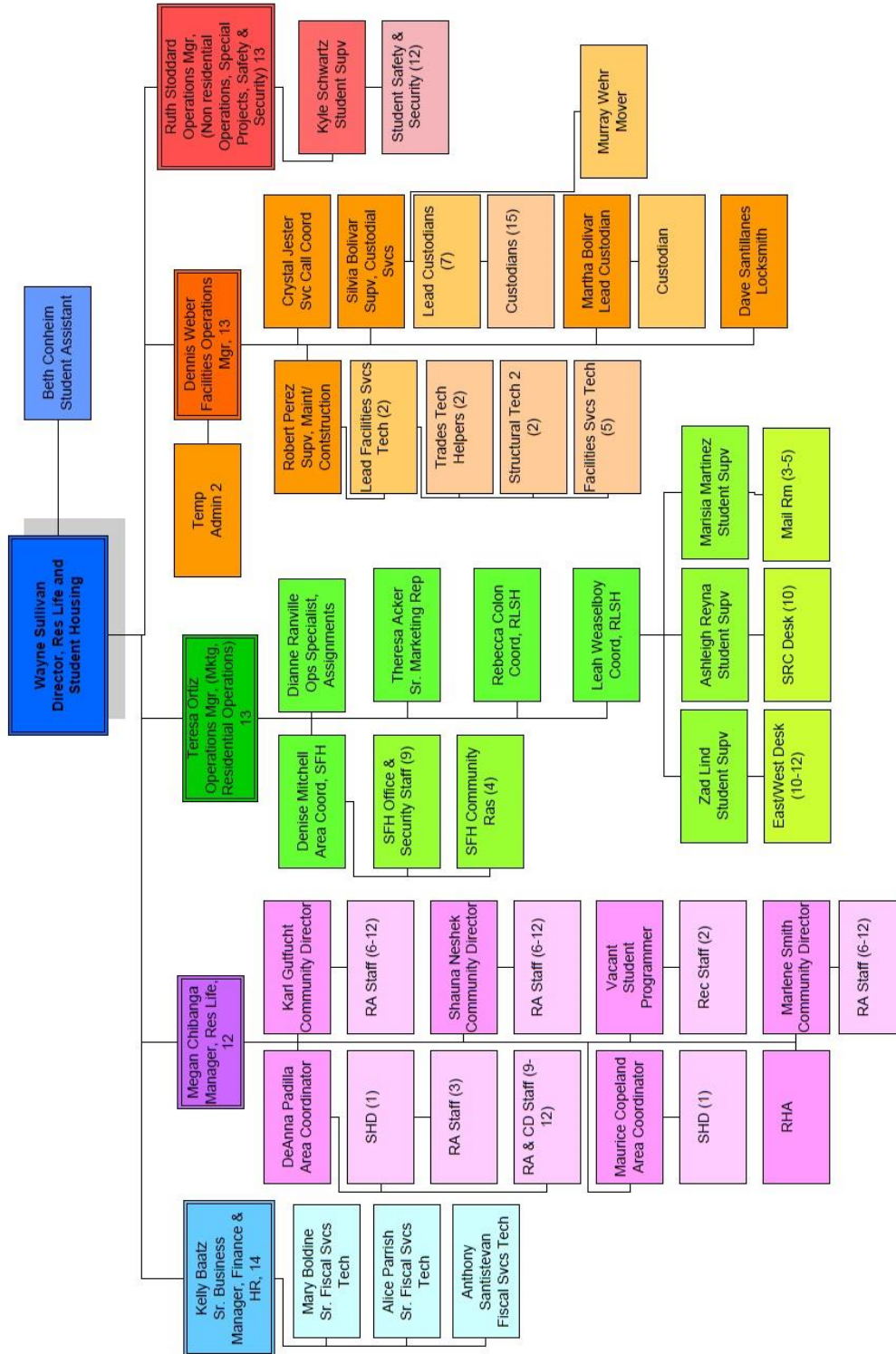
Community

UNM Residence Life and Student Housing embraces the idea that communities are comprised of diverse individuals from all walks of life. We nurture healthy, thriving communities that help residents feel connect to each other, as well as the institution. Residents are encouraged to participate as active and engaged citizens within their living area.

Vision

To support and develop outstanding UNM students in a residential setting.

Organizational Chart



2014-2015 Annual Report

Table of Contents

I.	Executive Summary	125
II.	Accomplishments	125
III.	Current Projects	126
IV.	Future Plans	126
V.	Personnel Appointments and Separations	127

I. EXECUTIVE SUMMARY

UNM Residence Life & Student Housing continues to make refinements in all areas as we aim to serve the University, deliver the positive collegiate living experience we want our residents to have and plan changes and programs for the future. We made some critical facility repairs through partnerships with other UNM departments, refurbished facilities to improve the living environment, returned Residential Education staffing levels to minimum standards to help ensure resident development, and improved processes and programs.

Fiscally, we have been conservative in filling open positions and were able to move more money into plant fund than we budgeted for in addition to meeting commitments for debt service, support of the University and ISS.

In addition, we worked closely with several other ISS departments as well as University & Honors Colleges. These partnerships allowed us to make improvements and gain efficiencies. As enrollment and occupancy challenges exist, these partnerships, efficiencies and future plans remain critical to maintaining success.

II. ACCOMPLISHMENTS

UNM Residence Life and Student Housing had a successful year building on the significant changes made in 2013-2014.

Many facility projects were completed this fiscal year, including FOB proximity access for Coronado Hall, partial roof replacements for Alvarado and Student Family Housing, and updated wireless access for Laguna DeVargas, Santa Clara, Hokona, and Redondo Village Apartments. In addition, the Hut in Redondo Village Apartments and the Alvarado and Hokona basements were renovated and refurbished. At Student Family Housing, a new CMTS unit was installed to improve internet access, and building locks were updated to address increased reports of theft throughout the year. We also saw updates to recreational spaces, including the renovated Lower Johnson and resurfacing of the volleyball court at Student Family Housing.

Although initiated in the prior Fiscal Year (FY14-15), the following projects were completed before the residence halls were opened in August 2015: complete remodel of Alvarado rooms, Laguna DeVargas shower remodels, and courtyard repairs in the Laguna DeVargas area.

Residence hall occupancy numbers are reflected in the following table:

Fall 2014	1,823
Spring 2015	1,672
Summer 2015	264

The summer conference season was highly successful for Residence Life and Student Housing. This year our income increased by over \$75,000.00 and we managed 17,771 total bed nights, including the STEAM-H conference which had 871 participants.

The Resident Education efforts were strong with over 1,600 programs implemented by Resident Advisors, Community Associations, Residence Hall Association, and on-campus housing organizations. The on-campus housing organizations continued to grow, and one of them, the EcoReps, managed to secure a grant allowing for 1,056 recycling bins—enough to place one bin in each room or apartment within Residence Life and Student Housing. The Living and Learning program has been improving through sustained efforts to build relationships between our residents and campus partners. Additionally, we successfully hosted RAppin', a regional conference for Resident Advisors.

III. CURRENT PROJECTS

Residence Life and Student Housing continues to update and improve our facilities. In the works are the repair and painting of the exterior stairs of the SRC, pedway lighting upgrades, and new bathroom sinks and counters in nine Hokona bathrooms.

We are in the process of developing a plan for the UNM Short Term Housing business, including marketing, contracts, operations, amenities, and payment options.

Resident Education is re-structuring Community Association meetings to better fit the needs of residents in different complexes, as well as changing the programming model to produce more high quality programs to engage students. Additionally, a new paperless system, PaperCutNG, has been implemented for Room Condition Reports and room changes.

IV. FUTURE PLANS

Residence Life and Student Housing continues to actively plan for our future including adapting marketing plans to the changing environment and enrollment scenarios including telling our story, communicating the benefits of living on campus, and embracing UNM's new marketing firm. We also plan to enhance our ResCenter portal for residents to remove barriers for potential residents, plan summer refurbishment projects while maintaining a focus on saving plant fund for future larger scale projects, and continue to use technology as a tool for serving our residents, being efficient and environmentally conscious. Finally, we plan to continue development of a set of well-organized, accessible internal policies and procedures for better, more efficient operation, reduce errors, and allow staff to focus on their jobs rather than re-inventing processes.

V. PERSONNEL APPOINTMENTS AND SEPARATIONS

Staff Appointments

Karl Gutfrucht, <i>Community Director</i>	July 01, 2014
Shauna Neshek, <i>Community Director</i>	July 01, 2014
Marlene Smith, <i>Community Director</i>	July 01, 2014
Deanna Padilla, <i>Area Coordinator</i>	July 21, 2014
Stacie Jackson, <i>HR Administrator 1</i>	September 01, 2014
Olga Martinez, <i>Custodian</i>	September 16, 2014
Crystal Jester, <i>Service Call Coordinator</i>	September 29, 2014
Luz Garcia, <i>Custodian</i>	October 13, 2014
Raymond Baca, <i>Custodian</i>	October 20, 2014
Maria Leticia Luna, <i>Custodian</i>	November 10, 2014
Elisa Garcia de Ramirez, <i>Custodian</i>	November 17, 2014
Andrew Garcia, <i>Trades Tech Helper</i>	February 04, 2015
Scott Palmer, <i>Lead Custodian</i>	April 18, 2015
Victor Alvarez, <i>Custodian</i>	May 09, 2015
Raimundo Rodriguez Saenz, <i>Lead Custodian</i>	May 16, 2015
Laurie Shuldt, <i>Custodian</i>	May 30, 2015
Nick Wylie, <i>Custodian</i>	May 30, 2015

Staff Separations

Nicholas Lockwood, <i>Area Coordinator</i>	July 11, 2014
Thomas Cole, <i>Master Access Control Tech</i>	July 31, 2014
Maria Esperanza Lujan, <i>Custodian</i>	August 31, 2014
Luz Garcia, <i>Custodian</i>	October 17, 2014
Michael Garcia, <i>Facilities Services Tech</i>	December 18, 2014

Michael Lente, <i>Master Painter</i>	January 31, 2015
Scott Palmer, <i>Lead Custodian</i>	April 26, 2015
Rachel Ortiz, <i>Administrative Assistant 2</i>	May 15, 2015
Barbara Gaunt, <i>Lead Custodian</i>	May 29, 2015
Jeremy Gonzales, <i>Facilities Services Tech</i>	June 12, 2015
Jose Montano, <i>Structural Tech 2</i>	June 30, 2015

Appendix K



FY 2014-2015 Annual Report

Real Estate Department

Submitted by:

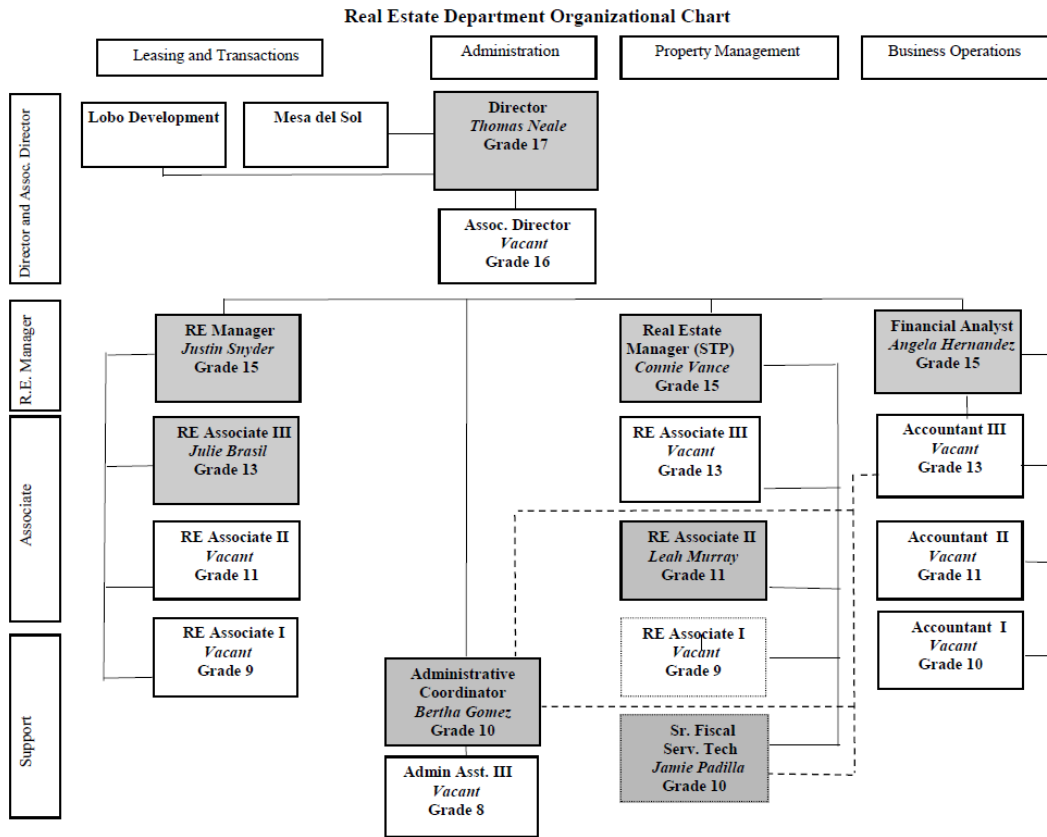
Thomas M. Neale, Director

<http://iss.unm.edu/red>

Mission Statement

To provide effective, efficient real estate service to University customers who support institutional needs. “Real estate services” relate to leasing, transactions (purchase and sales), feasibility and ‘highest and best use’ analysis, property and asset management, and investment and portfolio management. “University customers” include administrative and business organizations, academic and research units, senior executive management and the Board of Regents. “Institutional needs” encompass short-term ‘tactical’, as well as long-term “strategic” needs.

Organizational Chart



10/28/2015

2014-2015 Annual Report**Table of Contents**

I.	Executive Summary	132
II.	Overview	132
III.	Accomplishments	132
IV.	Current Projects	133
V.	Future Plans	133
VI.	Personnel Appointments and Separations	133

I. EXECUTIVE SUMMARY

The Real Estate Department (RED) manages all real estate activities of the University, including: (1) purchases, sales, development and leasing of institutional real property, (2) off-campus leasing for UNM tenants, (3) property management, and (4) revenue generating investment real property.

II. OVERVIEW

RED consists of eight full-time employees and one half-time term employee. Major areas of responsibility include: property management, leasing, acquisitions, financial and feasibility analysis, internal consulting, and administration. RED provides comprehensive real estate services for all entities of the Regents including academic and research units (North, Central, South, and Branch Campuses), Health Sciences Center, UNMH Hospitals, UNM Medical Group, and Science and Technology Corporation. In addition, RED provides professional real estate support to Lobo Development.

RED currently administers over 1,000,000 square feet of leased space with annual rent obligations of approximately \$13,500,000. RED has direct fiscal responsibility for approximately 320,000 square feet of office space, a number of ground leases, billboard leases, oil and gas distribution orders, and license agreements. We provide property management for an additional 230,000 square feet of commercial and institutional space. The amount of space under direct management has been consistent for the past three years.

III. ACCOMPLISHMENTS

RED adopted the principles of Performance-Based Management and continually strives to maximize revenue potential, control operating and administrative expenditures, and increase staff productivity. RED achieved highly successful results during one of the worst and prolonged downturns in the local commercial real estate markets. Tremendous focus has been placed on restructuring our systems for financial management and reassigning staff to maximize production within RED. Staff continues to seek opportunities to improve financial performance.

Collected revenues from all sources in FY 2013 were \$5,168,000 and totaled \$5,360,000 for FY 2015, an increase of 3.7% over the three year period. Revenues per full time employee (FTE) were \$544,000 in FY 2013 and \$630,000 in FY 2015, representing an increase of employee productivity of 16%. During this period we reduced our administrative expenses by 7.5%.

During the past three fiscal years, RED completed over \$40,200,000 in real estate transactions on behalf of the University. During FY2015, RED closed four transactions valued at \$8,050,000, including land at Sunshine Terrace, the former First Baptist Church, and the former Taos Civic Center.

A major initiative that required significant support from all staff members was the restructuring of our financial reporting process that included the implementation of portfolio management software, creation of transparent financial reports that align with industry standards for the management of a large portfolio of real property assets, historical performance metrics, and a long-term budgeting model. None of these improvements existed prior to FY2013.

RED had an administrative budget of \$302,244 which was consistent over the last several years. RED ended FY2015 with a balanced budget and had no significant year-end reserves.

IV. CURRENT PROJECTS

RED staff are currently working on a number of acquisitions on behalf of various institutional entities including the acquisition of the former Yale Reservoir, five remaining lots at Sunshine Terrace, and a number of targeted land acquisitions for the Health Sciences Center and UNM Hospitals.

V. FUTURE PLANS

RED will continue to strive to increase revenues and returns on real property assets under management, slow the growth in operating and administrative costs, and continued focus on staff productivity. During FY 2016, we focus on improved financial reporting and staff development.

VI. PERSONNEL APPOINTMENTS AND SEPARATIONS

During FY 2015, there were no staff separations or new hires.

Appendix L



FY 2014-2015 Annual Report

Staff Council

Submitted by:

Crystal Davis, President

Jodi Perry, Treasurer

Kathy Meadows, Administrative Officer

<http://staffcouncil.unm.edu>

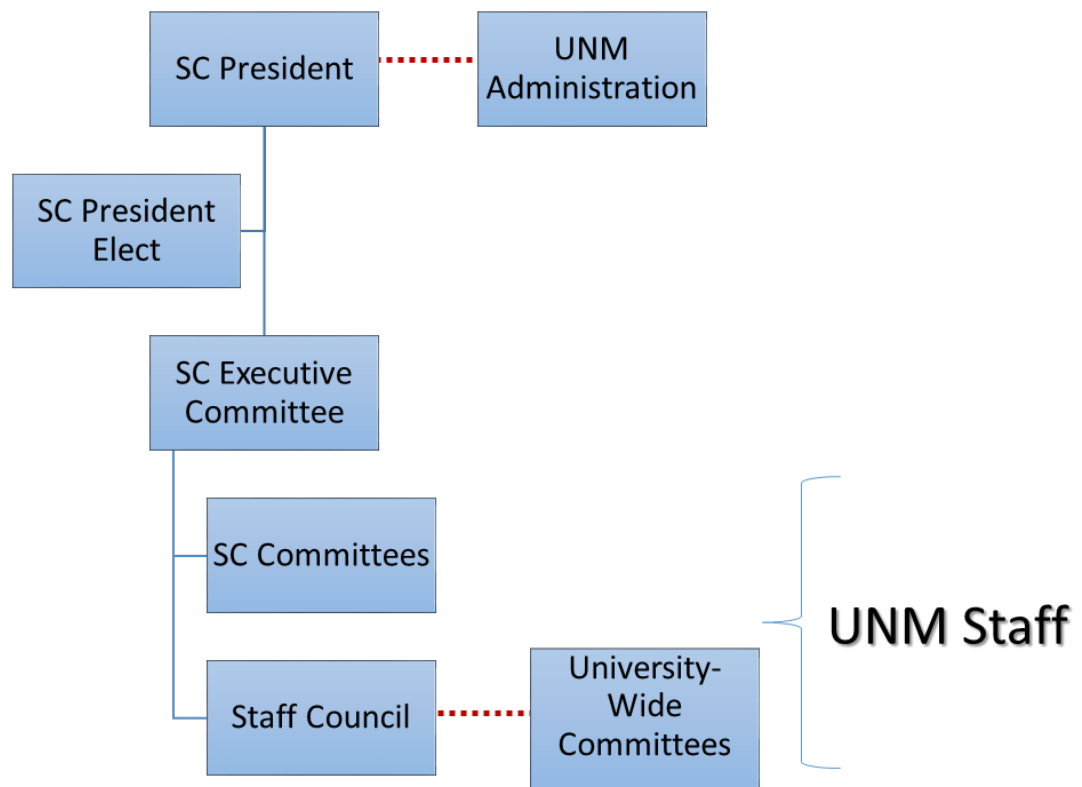
Mission and Vision

Staff Council nurtures leadership, education, advocacy, diversity, and service (LEADS) by:

- Focusing on the development of leadership skills, aptitudes, and behaviors necessary to succeed in lifelong learning and viable career pathways
- Communicating with constituents, faculty, students, and the administration about the promotion of the well-being of every staff member at UNM
- Providing UNM Staff a support structure and forum to address issues of concern
- Providing opportunities for staff to work with people and organizations across the University and in our community

Improving the working lives of staff at the University of New Mexico.

Organizational Chart



**Staff is non-bargaining unit staff*

2014-2015 Annual Report

Table of Contents

I.	Executive Summary	137
II.	Accomplishments for FY14-15	137
III.	Current Projects	138
IV.	Future Plans	138
V.	Appendix A	139

I. EXECUTIVE SUMMARY

The UNM Staff Council serves as the voice for staff in shared governance at the University of New Mexico by conveying information and making recommendations to the President and Board of Regents regarding interests and concerns of staff. The Staff Council is organized as a collective voice, which fosters a spirit of unified community and encourages the exchange of ideas and concerns in supporting the mission of The University of New Mexico. Over the past year, the University of New Mexico Staff Council engaged in several campus-wide activities that enable us to represent our constituents and help make effective institutional changes to improve the quality of life for staff. These activities included:

1. Strategic Planning Implementation
2. Leadership Training
3. Branch Campus Liaison
4. Staff Engagement Events

From the above activities, the University of New Mexico Staff Council is focused on promoting a culture of life-long learning at UNM and helping support staff to grow professionally and academically. The goals of Staff Council are:

1. Represent constituents through two-way communication of policies, information, etc.
2. Serve UNM Staff by strengthening the collective UNM Staff ‘voice’
3. Highlight the many UNM Staff contributions to UNM
4. Foster leadership at UNM and in the community
5. Partner with UNM shareholders in efforts aimed at improving UNM Staff well-being

The Staff Council celebrated its 25th anniversary in FY15 and hosted several events including: Staff as Students, LOBORrito (on North and Main Campus), Gerald May Award Ceremony, and the Book Exchange (on North, Main, and South Campuses). After receiving feedback from constituents for the annual Staff Picnic, the Executive Committee decided to host the event on Main Campus over lunch, and it was a huge success. The constituent feedback on the event indicates this new tradition will continue into FY16. During FY15 the Staff Council did a complete overhaul of its website, and the end result is a website that is much easier to navigate for our constituents and our Councilors. The Staff Appreciation index had a carryforward of \$12,470 into FY16 which was listed in the COR for LOBORrito use in FY16. All of the carryforward has been expended. The General Operating index had a carryforward of \$2,454 into FY16 which will be used for miscellaneous expenses.

II. ACCOMPLISHMENTS FOR FY14-15

Implementation of the Staff Council Strategic Plan

Staff Council website redesign

Staff Council 25th Anniversary

Establishment of formal Branch Campus liaisons

Creation of Outstanding Supervisor Award Program commitment to permanent funding of Award Program from President, Provost, Chancellor

- Implementation of Community Engagement Leave Policy for Staff
- Revision and update of Staff Council governing documents (ByLaws, Election Code, Staff Councilor Handbook)
- Establishment of Staff Council Marketing Plan
- Implementation of formal procedures for Staff Council event and funding requests
- Creation of Events Committee
- Staff Engagement events
- Staff Appreciation events
- Staff Award programs

III. CURRENT PROJECTS

- Tokens of Appreciation: Internal Recognition Programs
- Implementation of Outstanding Supervisor Award Program
- Formal branding and marketing of the Staff Council with assistance from UCAM
- Staff Engagement events
- Staff Appreciation events
- Staff Award programs

IV. FUTURE PLANS

- Bring continued recognition and acknowledgement of staff's role in the academic, research, and healthcare mission of the university
- Recognition of individual staff through our awards programs
- Encouragement of staff to seek certifications, professional development, and degrees
- Providing staff the opportunity to meet with friends and co-workers at our Staff Appreciation events
- Continued engagement with staff to bring awareness of workplace issues, professional development and wellness
- Advocacy on behalf of staff at the New Mexico Legislature

V. APPENDIX A

Leadership Education Advocacy Diversity Service

STAFF COUNCIL STRATEGIC PLAN (2015-2020)



1



2



3



4



5

Represent constituents through two-way communication of policies, information, etc

- 1.1 Institute Internal Staff Council service awards
- 1.2 Create accountability system with commitment to Staff Council goals
- 1.3 Perform an environmental scan to identify, evaluate, and implement improvements to the existing Staff Council structure/system
- 1.4 Provide clear expectations and training for Staff Council (guidelines for communication with constituents)
- 1.5 All Staff Councilors and Staff Council Committee Chairs will sign Statement of Commitment
- 1.6 Develop quarterly Committee Chair leadership development
- 1.7 Encourage Staff Councilors to do eight hours of professional development per year
- 1.8 Review committee goals
- 1.9 Annual Staff Council Report
- 1.10 Focus groups
- 1.11 Establish committee communication and reporting process
- 1.12 Speaker or appointed Executive Committee liaison will attend all committee meetings
- 1.13 Implement budget process for accountability

Serve UNM staff by strengthening the collective UNM staff 'voice'

- 2.1 Market suggestion box online (BLOG)
- 2.2 Quarterly SC Town Hall meeting (one at UNM main, one at HSC North)
- 2.3 Presentations by Executive, Committee Chairs and feedback session
- 2.4 Encourage Branch Campus liaison to host Town Hall meeting
- 2.5 Staff meetings with administrators

Highlight the many UNM Staff and Staff Council contributions to UNM

- 3.1 Website SC President Blog
- 3.2 Website and Social Media (Facebook, Twitter, Instagram, YouTube, etc.)
- 3.3 eNews
- 3.4 Tuesday Staff Spotlight (Website)
- 3.5 Staff Recognition Awards/ Outstanding Supervisor Award (Collaborate with other Committees and Departments that recognize Staff)
- 3.6 Staff Hero Awards

Foster leadership at UNM and in the community

- 4.1 Partnership with Employee & Organizational Development (EOD)
- 4.2 Promotion of Supervisor Evaluations
- 4.3 Promotion of ongoing leadership training and development
- 4.4 Establish Outstanding Supervisor Award
- 4.5 RESPECT & Kindness Campaign for community engagement
- 4.7 Alignment with the SC Events Committee annual community service projects

Partner with UNM shareholders in efforts aimed at improving UNM Staff well-being

- 5.1 Annual Needs Assessment (with input from town hall quarterly meetings UNM, HSC; Surveys)
- 5.2 Promote the maintenance of staff benefits
- 5.3 Encourage equitable benefits with faculty
- 5.4 Encourage equal access to benefits (i.e., tuition remission, paid leave, flexible work schedules, wellness, etc.)
- 5.5 Establish steering committee on staff well-being
- 5.6 Involvement in campus wide opportunities for respect and kindness
- 5.7 Staff engagement events
- 5.8 Environmental scan of current gaps in career pathways (partner with HR)
- 5.9 Identify strategies and solutions for improving career pathways
- 5.10 Promote 5-year compensation plan
- 5.11 University-wide committee appointments



UNM | UNM Staff Council

1990-2015
staffcouncil.unm.edu

Appendix M



FY 2014-2015 Annual Report

Ticketing Services

Submitted by:

Mark Koson, Director

www.unmtickets.com

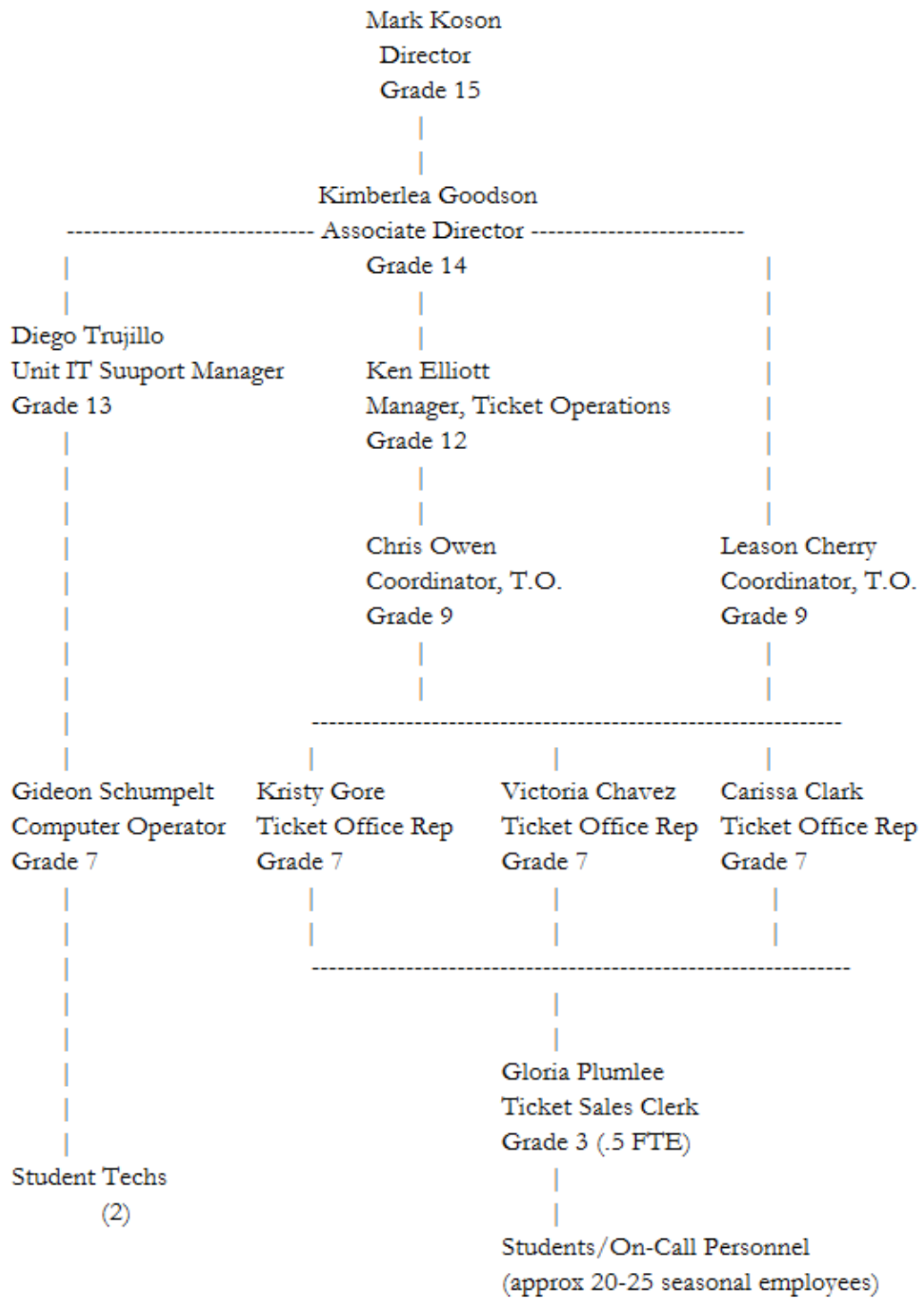
Mission Statement

To continue as a proactive leader in the ticketing industry, provide the highest level of service to our customers, represent the University of New Mexico in the most positive manner possible and be the premier ticket source in the Albuquerque/Santa Fe area.

Vision Statement

UNM Ticketing Services strives to be known for excellence in all facets of customer service, knowledgeable staff, financial stability, friendly and positive attitude, strong leadership, and active campus involvement.

Organizational Chart



2014-2015 Annual Report**Table of Contents**

I.	Executive Summary	144
II.	Accomplishments for FY14-15	144
III.	Future Plans and Recommendations	144

I. EXECUTIVE SUMMARY

Revenue-wise, this was the best year in the history of Ticketing Services. Service charge revenue was an all-time high of \$836,841. \$375,000 was contributed back to Institutional Support Services.

II. ACCOMPLISHMENTS FOR FY14-15

- Balanced budget for 17th consecutive year
- Highest service charge revenue for a fiscal year
 - Partnered with Expo New Mexico on State Fair for third consecutive year
 - ISS contribution of \$375,000
 - Upgraded to Enta Version 4.11.1
 - Implemented backup connectivity plan for The Pit, Bookstore and Arts Office
 - Implemented fee changes, with the result exceeding the \$30,000 goal
 - Managed tickets sales for sold-out WWE event at Tingley Coliseum
 - Developed and implemented enhanced online seating maps for major venues
 - PCI 2.0 Compliant

III. FUTURE PLANS AND RECCOMENDATIONS

- Continue ticketing State Fair events for 2016
- Continue to enhance test environment
- Expand backup connectivity project, to include University Stadium
- Develop scanning infrastructure/strategy for Print@Home tickets at University Stadium
- Transition ticketing system from Enta USA to Best Union, and pursue a long-term relationship with Best Union



FY 2014-2015 Annual Report

Planning, Budget, and Analysis

Submitted by:

Andrew Cullen, Associate Vice President, OPBA

<http://www.unm.edu/~budget/>

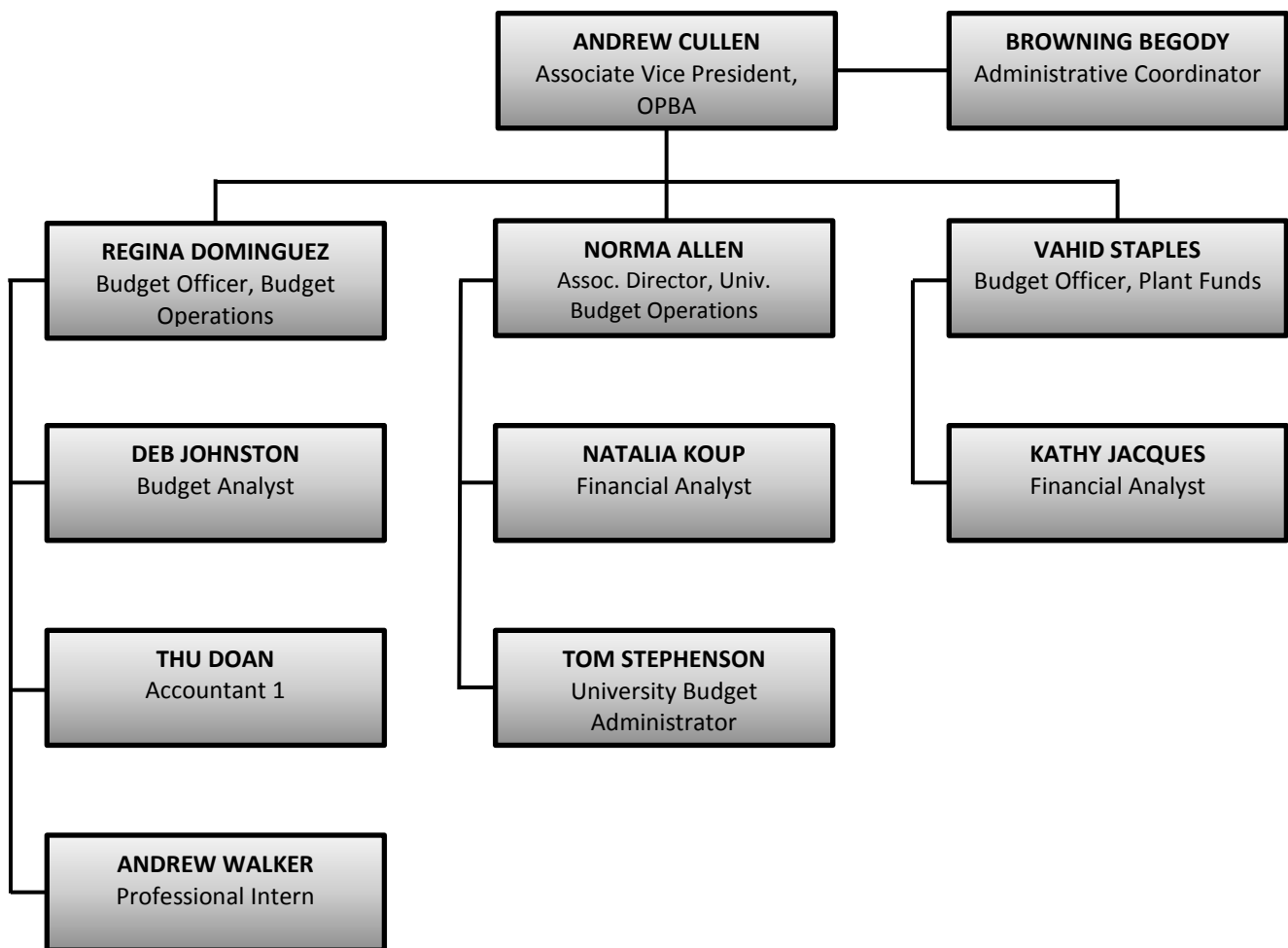
Mission and Vision

The mission of the Office of Planning, Budget, & Analysis (OPBA) is to effectively plan and manage UNM’s fiscal resources in support of the University’s mission of teaching, research, patient care, and community service.

The office works with UNM’s academic and administrative departments to ensure accurate, efficient, and successful budget planning, implementation, and reporting practices across all campuses.

We support the central administration and departmental priorities by identifying, projecting, allocating, and managing resources available for operating and capital expenditures, and work with state and local governments to ensure the effective management and use of appropriated resources to meet the stated goals of affordability and access for all New Mexicans.

Organizational Chart



2014-2015 Annual Report**Table of Contents**

I.	Executive Summary	4
II.	Overview: Budget Operations and Project Support	4
	Accomplishments FY 14-15	
	Current Projects	
	Future Plans/Goals FY 15-16	
III.	Overview: Plant Funds and Investment Support	6
	Accomplishments FY 14-15	
	Current Projects	
	Future Plans/Goals FY 15-16	
IV.	Recommendations	8
V.	Personnel Appointments and Separations	8

I. EXECUTIVE SUMMARY

Along with the day to day operations of the Office of Planning, Budget, & Analysis (OPBA), the office leads several University-wide initiatives. Most notably, the initiatives included projects that are at the forefront of President Frank's UNM 2020 Strategic Plan. They build upon efforts both central to the University's teaching and research mission, such as operational efficiencies to minimize costs, and outside the University's boundaries as the University of New Mexico leads the City and State effort to stimulate economic development in New Mexico through the realization of the Innovate ABQ Development Framework.

Central to the stewardship of the University's assets, the OPBA developed numerous reports for the Results Oriented Management (ROM) Project which builds upon the newly acquired WebFOCUS reporting tool. Several of these reports have played a critical role in the tuition share metrics that will ultimately assist in allocating budget funds, whether they are driven by increases from State Appropriations or decreases which might have resulted from enrollment declines.

During FY 15 there was an enrollment decline which resulted in a \$3.6 million revenue shortfall. In an effort to honor the University's stance to protect the institution's instructional mission, central reserves were identified to fund the shortfall on a one-time basis. With a projection of flat enrollment for FY 16, permanent budget reductions were then able to be thoughtfully implemented during the annual budget development cycle.

The 1% FY 15 budget reduction had a minimal impact on the operations for the OPBA, however, understanding the continued pressure to minimize administrative support costs, the office began planning during the last part of FY 15 to reduce its workforce. The analysis, driven largely by the automation of annual reporting functions to the State of New Mexico, suggests that the OPBA will be able to eliminate two full-time FTEs with minimal impact to current service levels.

II. OVERVIEW: BUDGET OPERATIONS AND PROJECT SUPPORT

Accomplishments FY 14-15

- The staff on the Budget Operations and Project Support Team work continually each day on budget revisions submitted through the approval queue, tuition and fee projections, pooled fringe benefit projections, and various analyses such as year-end reserve projections and the categorization of those reserves. Annually, the staff is heavily involved in building the New Year budget scenarios, schedules, and legislative tracking reports which allow for the accurate projections of incremental revenues and the prioritization of incremental expenditures. Finally, staff gathers budget data and prepares schedules on an on-going basis for Executive Management, Regents' presentations, and external and internal entities to maximize resource allocations.
- Budget Systems and Higher Education Department (HED) Reporting
 - The OPBA administers three budgeting systems that we train departments to use each year. Given the nature of the University's IT system, the Operations Team spends countless hours testing the various systems due to Banner, WebFOCUS, and ODS upgrades. Training end users, reviewing and reporting the data, and meeting

with departments regarding their projections is a necessary and beneficial endeavor and produces better projections, which manifests itself into more meaningful information. The systems include:

- Budget Planner
 - Mid-Year Reviews/Projections System
 - Categorization of Reserves
- By law, we are required to report our New Fiscal Year and Current Revised Budget and Year End Report of Actuals to HED.
 - This year, we successfully converted the Gallup Campus to use the HED WebFOCUS reporting format for the New Fiscal Year and Current Revised Budget submission.
 - This year we successfully converted all the Branch Campuses to use the HED WebFOCUS reporting format for the Year End Report of Actuals submission.
- In addition, we simplified the Branch Overhead chargeback process.
 - Based on the ROM Administrative Metrics for the OPBA, we implemented additional training sessions and enhancements in collaboration with Academic Affairs and Fiscal Agents.
 - Phase III Implementation of Academic Forecasting Tool (formerly known as ROM) WebFOCUS Reports—Staff from the OPBA worked with IT and Academic Affairs to complete Phase III WebFOCUS report changes.
 - Process Improvements related to the Journal Voucher Approval Queue
 - Implemented a separate approval queue for transactions related to Renewal & Replacement, Retirement of Indebtedness, and Investment in Plant. The OPBA approvers in this queue focus on this queue only.
 - Assignment of non-plant transactions to the OPBA staff by school/college. This queue is separate from the plant queue mentioned above.

Implementing the changes referenced above will allow the OPBA staff better sight recognition of transactions that they are responsible for, as well as allow them to become more familiar with the processes of each school/college. The intent is to increase turnaround time and improve customer service. Our goal is a 24 hour business day turnaround and most often we are able to review a journal voucher the same business day.

Current Projects

- FY 17 Budgeting Process—The OPBA updated the four year budget plan for all of main campus. In addition, we are working on the FY 17 budget scenario.

- We are down two FTE on the Budget Operations and Project Support Team. Due to budget constraints, there are no plans to fill these two positions. The remaining employees on the Budget Operations and Project Support Team will absorb the duties. This is only possible due to the process improvements we have implemented over the past two fiscal years.
- The Budget Operations and Project Support Team have taken on new duties and responsibilities in the area of vacancy review. This team is responsible for reviewing all unrestricted vacancies, recouping vacancy savings, and adjusting budgets within the EVP for Administration area.
- Website Re-Design—The OPBA staff is currently working with the Communications and Marketing department to re-design the OPBA website to modernize the look and feel and to make it more user-friendly, especially to individuals who are unfamiliar with the OPBA and the various reports it produces.
- The OPBA Process Improvements—We are working to convert the remaining Branch Campuses (Los Alamos, Valencia, and Taos) to use the HED WebFOCUS reporting format for the New Fiscal Year and Current Revised Budget May 1, 2016 submission.

Future Plans/Goals FY 15-16

- Refine the vacancy review process for the EVP for Administration area.
- Compile a recommendation for the EVP for Administration on how to fund current priorities by identifying efficiencies within administration with the use of shared service centers and/or departmental restructuring.

III. OVERVIEW: PLANT FUNDS AND INVESTMENT SUPPORT

Accomplishments FY 14-15

- The OPBA staff work each day on capital budget revisions submitted through the approval queue and various analyses.
- Bond Refunding—The OPBA successfully refunded the 2003A, 2003B, 2003C, and 2005 Bonds. As a result of the refunding, the University will recognize significant savings through a reduction of its total debt service payments.
- Standby Bond Purchase Agreement (SBPA)—The OPBA worked with the University's Financial Advisors, Bond Counsel, and Liquidity Provider to put in place a new agreement with U.S. Bank. The new agreement is for a three year term and ends December of 2017. Replacing the liquidity facility resulted in significant savings to the University of New Mexico.

- The OPBA staff worked with various outside entities including First Southwest, Modrall Sperling, JP Morgan, G.K. Baum, and U.S. Bank on the refunding's and SBPA. As part of the bond refunding process, the University of New Mexico had formal financial reviews by its rating agencies, Moody's and Standard and Poor's, which resulted in a successful affirmation of the University's Aa2 and AA ratings respectively.
- Per statute, the OPBA reported New Fiscal Year and Revised Budgets and Report of Actuals for all Plant Funds to the HED. Staff from the OPBA worked with Health Science Center and the Branch Campuses to pull together and ensure consistency on all submitted plant information.
- OPBA staff led work with the Debt/Investment Advisory Committee (DIAC) to adopt three new policies ensuring written policies are in place to address heightened scrutiny that tax-exempt issuers are experiencing directly from the IRS and indirectly from the Securities and Exchange Commission (SEC). All policies are linked to University Administrative Policy 7610 and are currently housed on the Budget office website. The policies are:
 - Debt Management Policy
 - Continuing Disclosure Policy
 - Post-Issuance Tax Compliance Policy

Current Projects

- Bond Refunding and New Issuance—The OPBA is working on refunding the 2007A and 2007B Bonds, as well as issuing new bonds for capital improvements on campus. This process involved gaining support from faculty, staff, students, executive management, and ultimately the UNM Board of Regents. Once complete, the University will again recognize significant savings in total debt service requirements. The new bond proceeds will fund:
 - The Anderson School of Management (New Facility)
 - Johnson Center Expansion and Renewal
 - Smith Plaza – Infrastructure and Renewal
- Investment Returns—Continue review of Certificate of Deposit (CD) laddering approach for UNM Bond Renewal and Replacement funds as well as STC.UNM Building Renewal and Replacement reserves. The various certificates continually mature requiring their replacement with new CDs that adhere to the Investment Policy Statements overarching goal of safety, liquidity, and yield.

Future Plans/Goals FY 15-16

- Work with the Planning, Design, and Construction Department to ensure cost effective implementation of the capital projects associated with the new bond issue.
- Review debt service portfolio after refunding's complete. Emphasis will be placed on review of available revenue to analyze the potential of an additional refunding and new revenue bond issue.

- Review investment portfolio to try and identify any potential areas where increases in interest yield can be attained within the Investment Policy parameters.
- Facilitate the refunding of NMFA Cigarette Tax Bonds.

IV. RECOMMENDATIONS

The OPBA, in conjunction with the Executive Vice President for Administration, must lead the budget reform efforts currently being requested by the Board of Regents and University President as a result of enrollment declines. An important aspect of this effort will be implementing administrative and instructional efficiencies within schools and colleges that streamline operations while also reviewing administrative policies and procedures that will result in cost savings at appropriate service levels. Specific opportunities must still be investigated, but shared administrative service centers have proven to be effective cost saving initiatives at other higher education institutions and must be evaluated for implementation here at UNM in FY 16 and beyond.

In addition to operational efficiencies, investment returns will continually be evaluated in an effort to bolster investment income and the University of New Mexico’s bond portfolio will be scrutinized to determine if further savings can be achieved by refunding current outstanding bond issues or by other means related to the Standby Bond Purchase Agreement and Liquidity Providers.

V. PERSONNEL APPOINTMENTS AND SEPARATIONS

Personnel Appointments:

Andrew Walker, Professional Intern

Start Date:

9/15/2014

Personnel Separations:

There were no personnel separations for the OPBA during FY 14-15.



FY 2014-2015 Annual Report

Police Department

Submitted by:

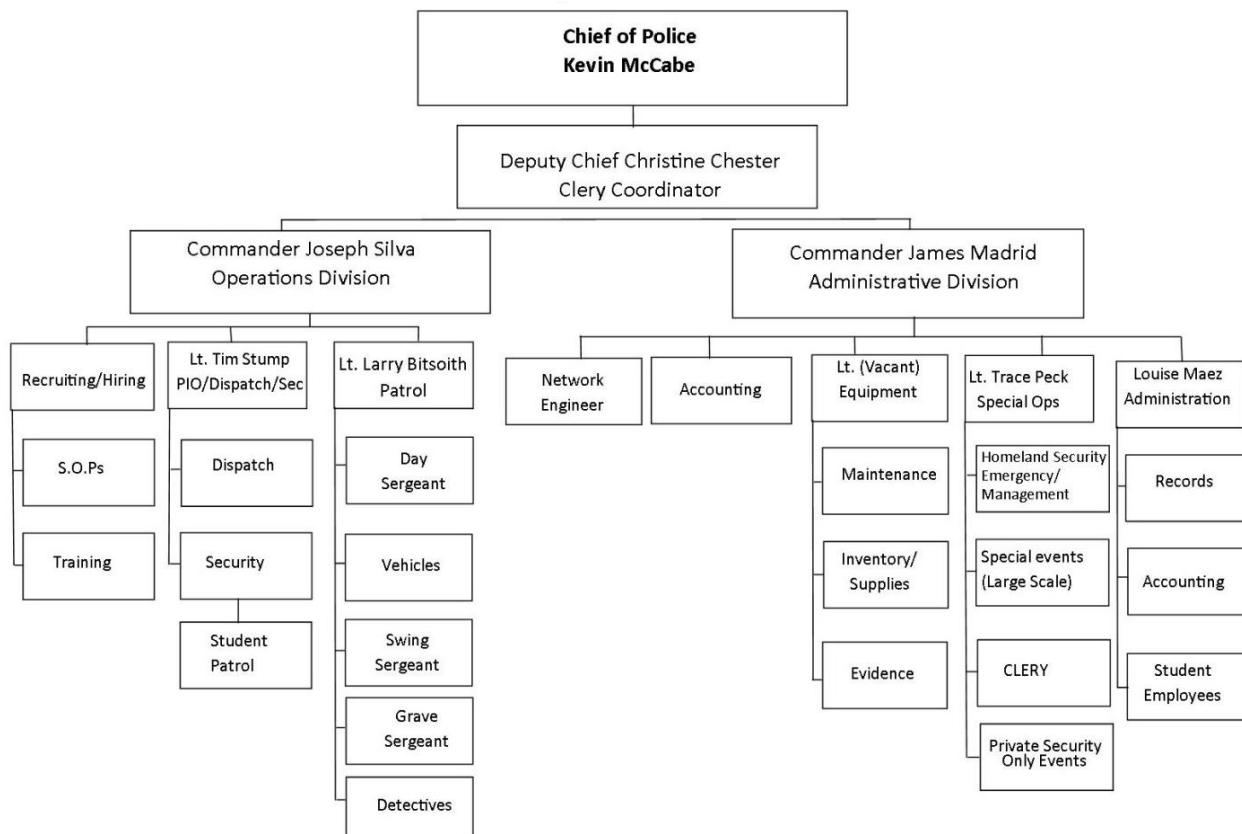
Kevin McCabe, Chief of Police

<http://police.unm.edu>

Mission and Vision

To provide the University of New Mexico with exceptional police services for the preservation of human rights and the protection of people and property. These services will be provided with an emphasis on proactive measures, minimizing the need for reactive responses. We will strive for a positive interaction with outside agencies and maintain a strong, cooperative relationship with the community by respecting differences and fostering a better understanding.

Organizational Chart



2014-2015 Annual Report**Table of Contents**

I.	Executive Summary	4
II.	Overview	4
III.	Accomplishments	6
IV.	Current Projects	6
V.	Future Projects	7
VI.	Department Staffing	8
VII.	Outside Professional Activities of Staff Members	9

I. EXECUTIVE SUMMARY

The University of New Mexico Police Department (UNMPD) has an operating budget of \$3,036,702.00. In the past 5 years labor expenses accounted for 90% or more of the total operating funds for UNMPD. In the upcoming fiscal year, the budget will see a reduction of 10% in response to University-wide budget concerns. To help offset the reduction and operating expenses, salary savings are used. However, this is dependent on employee turnover, which is unpredictable. The most significant event that took place at the UNMPD during the FY 2014-2015 was sexual assault on college campuses and does the university's respond appropriately. A climate assessment survey on sexual assault coupled the Department of Justice's investigation on how the university views and responds to incidents of sexual assault resulted in a serious examination of the UNMPD's Policies and Procedures pertaining to sexual assault. The survey identified issues such as police presence, how and to whom to report a crime such as sexual assault, safety of buildings on campus, building lighting and access, and the homeless population on campus. The other area of significance dealt with the Clery Act. Internal Audit conducted a review of how well the university was complying with the requirements of the Clery Act and issued recommendations to address the areas of deficiencies. I will discuss how the department has reacted to each of the issues in detail.

II. OVERVIEW

In Fall 2014, UNM Legal Counsel hired Pilgrim Associates (P&A) to conduct a climate assessment on sexual assault on the campus. The results of the assessment were published in early Spring 2015 with recommendations based on survey responses. The survey reported that students generally feel safe but would like to see an increase in police presence throughout the campus. Students would like to see improvements in the lighting and overall landscaping of the campus property. Students are concerned with the homeless population on and around campus and would also like to eliminate some confusion in the crime reporting process, notably sexual assault.

The UNMPD consists of 33 Officers when fully staffed to patrol campus 24/7. In supporting roles there are 6 Security Officers and 3 Student Patrol Officers. The department responds to approximately 25/30 calls for service a shift which consists of an area of 8 square miles, 300 buildings, and over 25,000 students. The department is adequately staffed to handle the calls for service each day but in order to properly address the survey in regards to increased police presence, UNMPD requires more officers. Increasing personnel would require a considerable budget increase. To address the concerns now, we stress to officers the need to patrol the campus at all times utilizing foot patrol and bicycles for greater visibility and contact with students. Officers conduct daily building checks in the evening hours for unlocked doors or subjects who are not authorized to be on campus during these times. In regards to the issue of sexual assault on campus the UNMPD continues to be committed to the response and investigation of all cases of reported sexual assault.

The UNMPD Sexual Misconduct and Assault Response Team (SMART) is currently staffed with a Sergeant and 4 Officers who are specially trained to respond and investigate sexual assault. The unit participates in a monthly Multidiscipline Team meeting with other stakeholders from the UNM

community. The team works closely to ensure our response is correct and also that all the services and resources available to involved students are being provided.

The UNMPD assumes an active role in various committees throughout UNM to increase communication and development of positive relationships, extending beyond the department. The various committees include LoboRESPECT, Clery Steering Committee, SMART, Student Council, Emergency Management Response, Compliance Committee, and Minors on Campus. By participating in these meetings, UNMPD expands its footprint around the campus without increasing the number of officers employed. The use of online police reporting continues to positively impact UNM. In FY 2015 online reporting was responsible for 368 reports, saving 552 man hours and approximately \$18,000 in costs.

Another significant event taking place this year was naming Deputy Chief Christine Chester as the Interim Clery Coordinator for the University. The position of Clery Coordinator was recommended by Internal Audit after its review of the Clery Act. As the Interim Clery Coordinator, Deputy Chief Chester reviewed all action items identified by Internal Audit and addressed each one. A Clery Steering Committee was created and is chaired by Deputy Chief Chester. This committee is comprised of UNM staff who are responsible for upholding Clery Act requirements. One area that needed immediate attention from the university in order to be in compliance with the Clery Act was the proper identification of Campus Security Authorities (CSAs) and proper training for those identified. Approximately 723 CSAs were identified compared to the previous year of 386. Of the CSAs identified, 349 were registered and trained, and 374 failed to register. We hope to get full compliance in the upcoming year. Deputy Chief Chester also drafted UNM Clery Policy which is currently under review.

Another area of significance is the communications dispatch office upgrade. New work stations were installed, wiring was repaired and updated, and the Global Threat Initiative Response alarm (GTRI) monitors were installed. GTRI is a partnership with Sandia Labs and Health Science Center (HSC) for the interfacing of an alarm system connected directly to UNMPD dispatch and a trained response team in the event of a terrorist attack on any one of the five UNM radioactive sources located on the UNM campus. As part of this initiative a response team of 10 individuals consisting of UNMPD, UNMH Security, and HSC personnel were sent to Oak Ridge, Tennessee for first responder training specific to an attack on a radioactive site.

In Spring 2015 all UNMPD officers received Crisis Intervention Training (CIT). This is a weeklong of intense training on how to respond to individuals in crisis and how to equip officers with the tools to resolve the situation peacefully and successfully.

III. ACCOMPLISHMENTS

- Appointment of UNM's Interim Clery Coordinator.
- Creation of online registration and training for all Campus Security Authority (CSAs).
- Identified 723 registered CSAs and 349 trained CSAs.
- Online reporting received 368 reports, saving approximately 552 man hours and \$18,000.
- Global Threat Response Initiative (GTRI) alarm response and training.
- Crisis Intervention Training of all Officers in responding to individuals in crisis.
- Radio Communication room upgrade of work stations and equipment to include installation of GTRI Alarm response.
- Implementation of RAVE Guardian, an app for the campus community to use as a safety device in which the user can identify a guardian who will be alerted if the user fails to reach predetermined destinations.

IV. CURRENT PROJECTS

- Additional upgrade of New World Computer Aided Dispatch (CAD) system software. The software upgrade is necessary to stay current with the changes and advances made since the initial CAD upgrade that was completed in 2010.
- Active Shooter Response training. All sworn officers participated in a New Mexico State approved Active Shooter Response training. The training is scheduled for August 2015 and consists of 4 hours of classroom instruction and 4 hours of actual live scenario training. The training consists of SWAT team officers from the Albuquerque Police Department and simulated munitions.
- Updating the UNMPD Policies and Procedures. The UNMPD's policies will be reviewed to update and make changes in accordance to the national standards currently being followed by law enforcement agencies. This project is expected to take 6-12 months to complete.
- Signing a Memorandum of Understanding (MOU) with the Albuquerque Police Department to participate in the Real Time Crime Center (RTC). The RTC is equipped with 16 Televisions, 8 work stations, civilian crime analysts, video production workers, and sworn personnel. We will be joining the RTC along with other local law enforcement agencies working together to provide real time intelligence and greater access to law enforcement data bases. The RTC has been instrumental recently in our coordinated response to the increased civil protests occurring on and around UNM.
- Creation of a Security and Safety committee consisting of law enforcement and Physical Plant Department to address students' security concerns regarding lighting, landscaping, and physical

layout of future building projects on campus. Committee was formed in July 2015 and meets monthly.

V. FUTURE PROJECTS

- The Department intends to address the radio communications upgrade that has been in the planning for the past three years. The Department radio communications system operates off of the City of Albuquerque Police Department's 800 MHZ system. In the process of upgrading our communication system, we were informed that the City was also in the process of going to a new communication system. Before we are able to move forward, the Department must standby until we learn what system will be used by the City in order for us to remain interoperable.
- The UNMPD still seeks a goal of 50 Officers that was approved previously but put on hold due to budget restraints felt by all UNM departments during the recession. The addition of almost 2,000 residential students who live on campus 24/7, the anticipated growth of the Caesar Chavez corridor with commercial businesses, and the increasing requests being made for police services due to the heightened awareness of active shooters, sexual violence, large scale protesting, and terrorism is making it difficult for the Department to keep pace. Presently, the UNMPD does not have the level of staffing, equipment, and facilities that are necessary to ensure success of the current growth of residential life and the anticipated growth of South Campus.
- The UNMPD is currently housed in Hokona Hall and as we grow, space is becoming an issue. The men's locker rooms are at full capacity. A facility with the space to accommodate locker rooms and a larger communications center in which we could incorporate a state of the art central monitoring station for CCTV would improve the UNMPD's effectiveness. An Emergency Operations Center should also be included in the planning.
- The space and equipment we currently have is inadequate to handle such an event and it became very apparent during a recent activation. A new facility would enable planning to take place to meet the needs of law enforcement and an Emergency Operations Center taking advantage of the state-of-the-art technologies to enhance our response to an emergency.

VI. DEPARTMENT STAFFINGDepartment Hires:

	<u>Hired</u>
1. Andrew Lehocky – Security Officer	10-20-14
2. Shonna Baca- Dispatcher	10-27-14
3. Joseph Silva- Police Commander	10-27-14
4. Rosendo Gallegos- Dispatcher	12-01-14
5. Michael Fisher- Police Officer	01-12-15
6. Candis Debrates- Police Officer	01-26-15
7. Martin Cordova- Police Officer	02-23-15
8. Ricardo Solis- Police Officer	03-09-15
9. Austin Aspen- Security Officer	03-16-15
10. Luis Arias – Security Officer	03-23-15
11. Adrian Tapia- Police Officer	06-26-15
12. Jennifer Marquez – Dispatcher	06-29-15

Promotions:

	<u>Promoted</u>
1. Christine Chester – Deputy Chief	07-01-14
2. James Madrid – Commander	07-01-14

Retires:

	<u>Retired</u>
1. Ann Landis – Dispatcher	11-04-15

Terminations/Resignations

	<u>Separated</u>
1. Manuel Catanach - Police Officer	Resigned 12-16-14
2. Wayne Jones –Police Officer	Resigned 01-12-15
3. Andrew Lehockey – Security Officer	Resigned 01-16-15
4. Shonna Baca – Dispatcher	Released on probation 03-19-15

Current Staffing Numbers:

Sworn Personnel:

1. Command Staff: 7
2. Sergeants: 3
3. Officers: 28

Civilian Personnel:

1. Administrative Staff- 5
2. Campus Security- 9
3. Dispatchers -7
4. IT Unit – 2

VII. OUTSIDE PROFESSIONAL ACTIVITES OF STAFF MEMBERS

- International Association of Chiefs of Police
- International Association of Campus Law Enforcement Administrators
- New Mexico Association of Chief of Police
- FBI Joint Terrorism Task Force



FY 2014-2015 Annual Report

Policy Office

Submitted by:

Pamina M. Deutsch, Director of University Policy and Administrative Planning

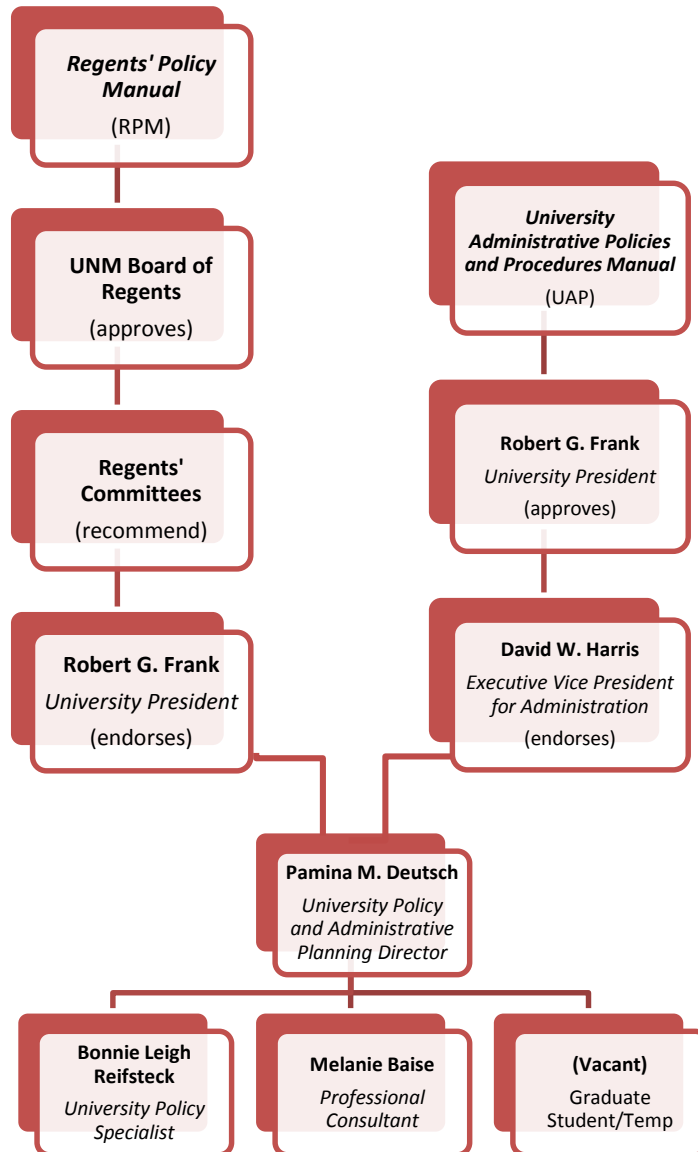
Bonnie Leigh Reifsteck, University Policy Specialist

<http://policy.unm.edu>

Mission and Vision

The UNM Policy Office oversees the development, revision, and issuance of the Regents’ Policies and the University Administrative Policies, while serving as the official repository for historical and current versions of the policies. Through the policies, the office strives to mitigate risk, enhance efficiency, and promote compliance with laws and regulations.

Organizational Chart



2014-2015 Annual Report**Table of Contents**

I.	Executive Summary	4
II.	Accomplishments and Significant Developments	4
III.	Current Projects	8
IV.	Future Plans/Goals	8
V.	Personnel Appointments and Separations	9

I. EXECUTIVE SUMMARY

Founded in 1990, the Policy Office is responsible for developing, amending, administering, and issuing the policies in the University Administrative Policy and Procedures Manual (UAPPM) and the Regents' Policy Manual (RPM), each of which contains approximately 150 policies. Related to this work, the office maintains the official University website of all currently issued UAPPM and RPM policies, and serves as a repository and archive for superseded versions of the policies.

The Policy Office accomplished a significant amount of work this academic year, despite a small staff. The regular staff consists of a full-time Director, Pamina Deutsch, and a half-time University Policy Specialist, Bonnie Leigh Reifsteck. This academic year the office also employed a part-time Graduate Research Assistant and an on-call Professional Consultant.

43 policies (nine more than last year) were developed or revised, including several complex new policies and substantive amendments to existing ones. Notable among these were Consensual Relationships and Conflicts of Interest, Education Abroad, Tuition and Fees, Sick Leave, Fundraising, Incentives for Program Participants, and Sexual Violence and Sexual Misconduct.

As part of its policy work and in support of other University initiatives, the Policy Office facilitated or otherwise participated in well over a dozen committees and task forces, on diverse topics such as guiding principles, consensual relationships, Title IX, loss prevention and control, institutional compliance, Clery Act compliance, minors on campus, fundraising, and smoke-free campus.

Since the consolidated Policy Office website was launched on February 28, 2013, the website has attracted many thousands of visitors and averages 400 visitors each workday. The website consolidates the two policy manuals, the RPM and UAPPM, on one website, and provides links to the two other primary UNM policy manuals, the Pathfinder and the Faculty Handbook.

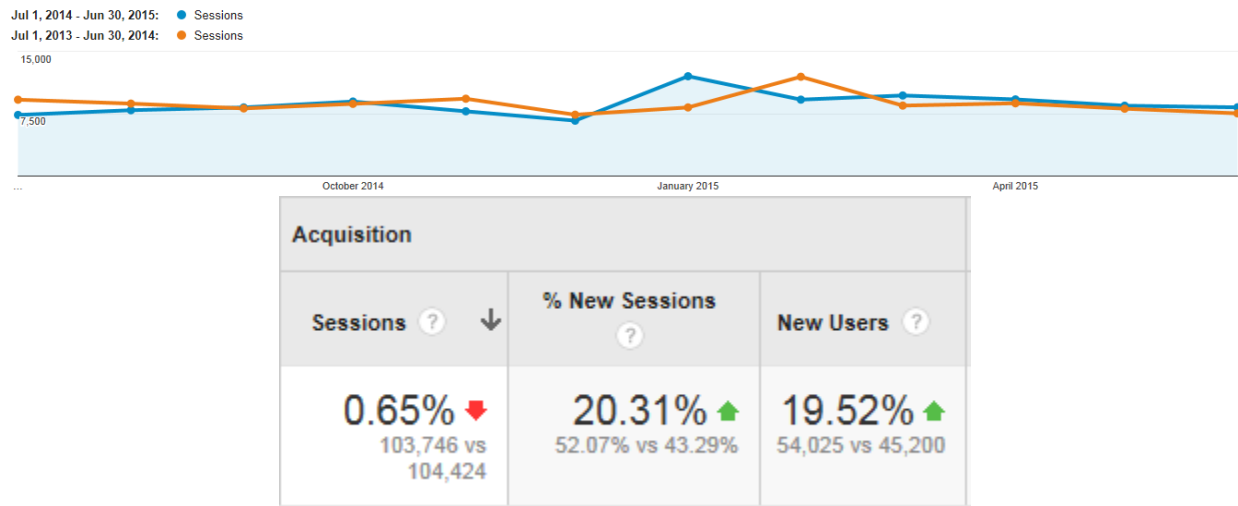
The Policy Office budget for Fiscal Year 2014-2015 totaled \$169,198 and was funded primarily by I&G allocation. Other than I&G and reserves, the budget includes a small amount of miscellaneous revenue that is reimbursement from the UNM Foundation for use of the Westlaw legal electronic database. The Policy Office has a trim administrative budget. Major expenses other than personnel costs include subscription to Westlaw legal database for policy research and development, seminars, travel for professional development and policy topics, professional services for historical policy scanning and IT maintenance, and office supplies. The Policy Office contributed \$50,000 in reserves to assist the University in balancing its overall FY15 budget.

II. ACCOMPLISHMENTS AND SIGNIFICANT DEVELOPMENTS

Website and Archives

Once policies are approved by the University President or Board of Regents, they are promptly posted on the Policy Office website and announced in the "News" section of the website, as well as in the UNM News Minute. Promotional items were developed and distributed on campus to promote the website, with good results.

Google Analytics data show that in the period from July 1, 2014 to June 30, 2015, the website received 103,746 visits; 54,025 first-time users; and an average of about 400 visits per workday. General spikes in usage were seen in October 2014, January 2015, and March 2015, corresponding with public comment periods for UAPPM policy drafts under review. Notably, on January 14, 2015, the site received 1,500 visits and on January 22, 2015, it received 1,383 visits. Data show in the graphs below that while the number of sessions remained roughly the same over the previous year, the percentage of new sessions and new users each increased by about 20%.



The eight most frequently viewed policies on the Policy Office website this year, in order of popularity, were:

- University Administrative Policy 3435 (“Inclement Weather”)
- University Administrative Policy 4030 (“Travel”)
- University Administrative Policy 3700 (“Educational Benefits”)
- Regents’ Policy 3.3 (“Appointment and Termination of Key Administrators”)
- University Administrative Policy 2520 (“Computer Security Controls”)
- University Administrative Policy 4000 (“Allowable and Unallowable Expenses”)
- University Administrative Policy 3400 (“Annual Leave”)
- University Administrative Policy 2500 (“Acceptable Computer Use”)

In addition, the Policy Office began a project to scan historical versions of the policies and upload them to LoboVault through University Archives, a project which is ongoing.

Significant Policy Accomplishments

In November 2014, a revised Education Abroad Policy was posted for open comment and approved. These approved revisions were the result of task force consisting of over 50 members, which was convened after initial revisions prepared in 2013 by two attorneys elicited a large amount of negative feedback. This revised policy was an example of the policy review process working effectively to align stakeholders across both sides of campus.

Two new policies were approved and issued after lengthy periods of development in committees, including the Fundraising and the Consensual Relationships and Conflicts of Interest Policies. The latter is the first University-wide policy on consensual relationships and, while it contains compromise language that was necessary to obtain faculty buy in, represents a significant accomplishment in that previous attempts to implement such a policy were unsuccessful.

Ms. Deutsch and Ms. Reifsteck participated on a committee facilitated by the President's Office to draft guiding principles for the University. These guiding principles were brought to the Board of Regents for consideration as a new Regents' Policy in the next academic year.

Policy Development

43 policy revisions or new policies were issued this year, as detailed below. In addition to the issued policies, significant time was devoted to other policies during this period that at certain times appeared on the verge of being in final draft form and ready for campus review and comment, but which ultimately required further discussion and will be issued in the future.

Newly Issued Policies

The following Regents' Policies were issued as new policies or amended versions of existing policies:

August 8, 2014

3.9 ("Benefits of the University President") - NEW

September 12, 2014

1.2 ("Structure of the Board of Regents")

3.7 ("Health Sciences Center Institutional Compliance Program") – title change only

7.2 ("Internal Auditing and Compliance")

7.3 ("Audit and Compliance Committee")

December 12, 2014

4.7 ("Tuition and Fees")

January 9, 2015

4.7 ("Tuition and Fees")

5.18 ("Endowed Faculty Chairs")

June 12, 2015

1.2 ("Structure of the Board of Regents")

3.5 ("Health Sciences Center Board of Directors")

The following University Administrative Policies were issued as new policies or amended versions of existing policies after a public comment and review period:

November 25, 2014

2215 ("Consensual Relationships and Conflicts of Interest") - NEW

2710 ("Education Abroad Health and Safety")

3425 ("Military and Related Service Leave")

- 3445 (“Domestic Abuse Leave”) - NEW
- 8210 (“Tuition and Related Fees”)
- 8215 (“Bursar’s Office Operations and Services”)
- January 8, 2015
 - 3435 (“Inclement Weather”)
 - 3410 (“Sick Leave”)
 - 3440 (“Family and Medical Leave”)
- May 15, 2015
 - 1040 (“Fundraising”) - NEW
 - 2060 (“Political Activity”)
 - 2100 (“Sustainability”)
 - 2295 (“Service and Assistance Animals”)
 - 2480 (“Incentives for Program Participants”)
 - 2740 (“Sexual Violence and Sexual Misconduct”) - NEW
 - 3200 (“Employee Classification”)
 - 3210 (“Recruitment and Hiring”)
 - 3225 (“Separation of Employment”)
 - 3300 (“Paid Time”)
 - 4030 (“Travel”)

The following University Administrative Policies were updated with minor revisions using an abbreviated process:

- July 21, 2014
 - 1310 (“Student Fee Review Board”)
- August 29, 2014
 - 2010 (“Contracts Signature Authority and Review”)
- October 1, 2014
 - 3210 (“Recruitment and Hiring”)
 - 3500 (“Wage and Salary Administration”)
- January 8, 2015
 - 2300 (“Inspection of Public Records”)
 - 7610 (“Investment Management”)
- February 20, 2015
 - 3215 (“Performance Management”)
 - 4000 (“Allowable and Unallowable Expenditures”)
 - 8210 (“Tuition and Related Fees”)
- March 26, 2015
 - 2290 (“Animal Control on University Property”)
 - 2500 (“Acceptable Computer Use”)
 - 3410 (“Sick Leave”)
 - 3700 (“Education Benefits”)

Professional Development

Conferences

- Cornell University's Institute for Internet Culture, Policy, and Law, Ithaca, New York (September 17-19, 2014) [Ms. Deutsch].
- Association of College and University Policy Administrators' Conference, Orlando, Florida (October 19-22, 2014).

Webinars

- Student & Faculty International Travel (July 10, 2014)
- Responding to Whistleblowers: Campus Policies & Protocol (August 7, 2014)
- Minors on Campus (November 20, 2014)
- Title IX and LGBTQ Issues (June 18, 2015)

Professional Organizations

- Members, Association of College and University Policy Administrators (Pioneer Members for new ACUPA organization and active members of its listserv)
- Member, ACUPA Membership Committee (Ms. Reifsteck)
- Member, Association of Governing Boards (Ms. Deutsch)
- Member, College and University Professional Association for Human Resources (Ms. Deutsch)

III. CURRENT PROJECTS

In connection with ongoing policy development, the Policy Office continues to facilitate or participate in substantial committee work regarding policies on Smoke-and-Tobacco-Free Campus, Background Checks, Whistleblowers and Reporting Misconduct, Clery Act Compliance, and Minors on Campus. Some of these policies remain under revision by committees or will go to public comment and final issue in the fall semester.

The Policy Office also contributes to other campus committees including Institutional Compliance, Loss Prevention and Control, Accreditation Committee – Criterion Two, Insurance Committee, and the Staff Engagement Survey Action Team.

In order to promote the Policy Office website and its policies, promotional items were developed and distributed on campus. The spork/knife combo item has been a big hit with constituents.

IV. FUTURE PLANS/GOALS

A major project for the upcoming academic year is to continue uploading scanned historical policies into the LoboVault online digital archives that are part of the UNM Archives. Once the project is complete, members of the campus community will be able to access superseded versions of the

policies on their own through LoboVault, without having to make a request for copies to the Policy Office.

The Policy Office intends to hire a contracted proofreader to review all policies on the Policy Office website.

The Policy Office hopes to develop and implement a successful strategy for conducting a comprehensive review and revision of the RPM, most of which has not been revised since 1996, the time of its inception.

The Policy Office continues to assign Process Owners to UAPPM policies currently without designated Owners, provide education to Owners about their responsibilities, and periodically notify Owners of policies within their purview that are in need of review.

Though the Policy Website currently receives about 400 visits each workday, the Policy Office is planning additional efforts to make the website more visible to the UNM community.

V. PERSONNEL APPOINTMENTS AND SEPARATIONS

Appointments

In February 2015, Nicole Gayer was hired as a graduate research assistant to assist with the LoboVault project. In March 2015, Melanie Baise was hired as an on-call professional consultant to provide assistance in policy research and development.

Separations

Nicole Gayer declined a continuation of her research assistantship into the next academic year in favor of a position within her major.



FY 2014-2015 Annual Report

Safety and Risk Services

Submitted by:

Carla P. Domenici, Director, SRS

<http://srs.unm.edu>

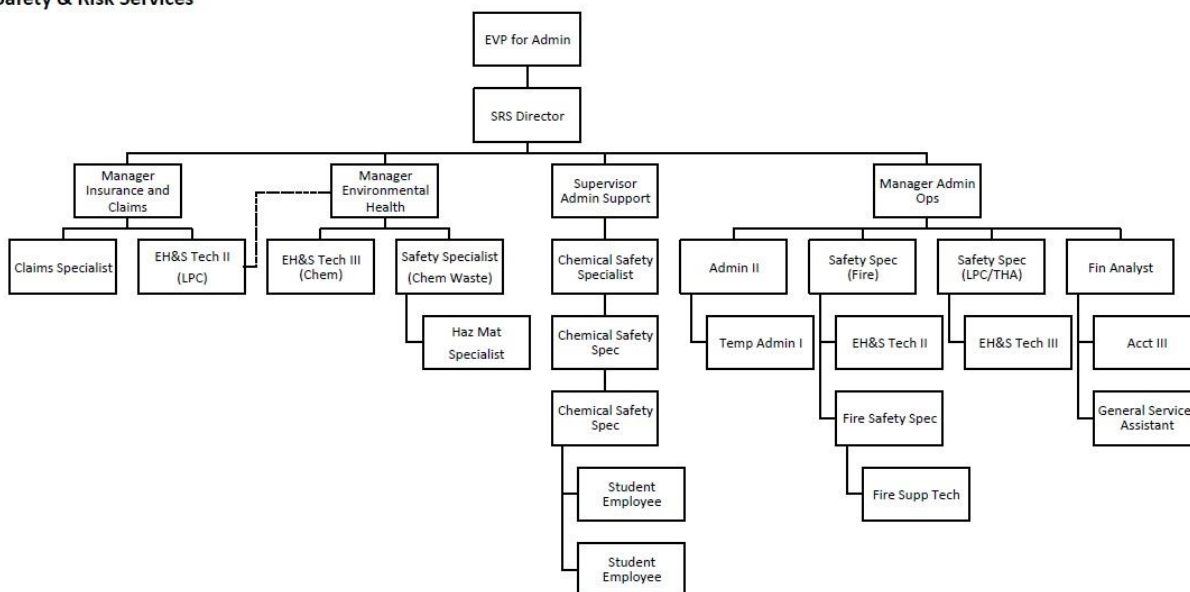
Mission and Vision

The Department of Safety & Risk Services supports the University's core mission by advancing the safety and health of the University community through risk management, best practices, education, consultation, and collaboration.

Organizational Chart



Safety & Risk Services



2014-2015 Annual Report**Table of Contents**

I.	Executive Summary	4
II.	Overview	5
III.	Accomplishments	6
IV.	Current Projects	6
V.	Future Plans/Goals FY15-16	13
VI.	Personnel/Staffing Information	14

I. EXECUTIVE SUMMARY

UNM proactively manages the occupational health and safety of its employees to insure a viable and productive environment. UNM responds to these obligations through the work of the Safety and Risk Services Department. SRS employees develop and implement occupational and risk management policy, monitor and audit University activities, staff various safety and risk management related committees, and interact with regulators as part of their departmental mission.

SRS promoted the health, well-being, and occupational safety of employees, students, and visitors. SRS employees accomplished this by ensuring that UNM was compliant with federal, state, and local regulations. SRS staff provided information, advice, training, and guidance to faculty, staff, and students to prevent injury and to promote safety.

SRS agreed to take on a new and important task during Fiscal Year 2015. This task is the testing of alarm systems on campus. UNM IT was formerly responsible for this task. As the testing was not occurring per Code, SRS agreed to take on the role. SRS worked with the Purchasing Department to finalize a contract with the necessary vendors and has embarked on this task.

During Fiscal Year 2015, SRS developed evacuation maps for the entire campus, including branches, and initiated fire evacuation drills. SRS also purchased fire extinguisher software to begin conducting monthly inspections in-house.

SRS was also a partner in the Gathering of Nations event. Its staff worked with vendors to ensure compliance with all state regulations. SRS also trained crowd control volunteers and made sure its employees were present throughout the event.

In the area of chemical safety, SRS hired and trained a crew of Chemical Inventory Specialists to inventory chemicals and train users of the ERM Software. SRS also launched the ChemWatch software that provides computer access to anyone at UNM who works with chemicals access to SDS sheets.

SRS developed and formed the UNM Insurance Committee and the UNM Fire Safety Capital Committee. These committees will assist SRS in making decisions on the purchase of insurance for campus and in making recommendations for expenditures to improve fire safety.

SRS continued to work collaboratively through the UNM Minors on Campus Committee with stakeholders from across campus to develop new policy guidelines for UNM.

SRS began the process of redeveloping its website with support from UNM's Information Technology Department. It is SRS' goal to complete the new website during Fiscal Year 2016.

During FY 2015, SRS renovated its chemical and hazardous material storage warehouse. SRS filled a retention pond that was situated on the north side of the chemical and hazardous materials shed. This process was facilitated by an appropriation of BR&R funds from the Budget Office.

SRS purchased furniture and cubicles for its office facilities to make the work environment more comfortable for SRS staff. The plans for an SRS break room were started and will be completed in Fiscal Year 2016.

SRS engaged in a team building activity with Ombuds Services. The Ombuds Services staff worked with SRS to create a safe forum to build trust among all employees and to improve communication. SRS employees worked very hard at this process and the results have been very rewarding. SRS learned how to work as a team and appreciate co-workers. The process assisted all SRS employees to identify commonalities and respect differences.

SRS is looking forward to making even more improvements in the upcoming fiscal year. SRS employees will always be striving to make UNM safer and to find innovative techniques to incorporate safety into day-to-day work.

II. OVERVIEW

Risk Services

SRS staff is responsible for a variety of risk management duties. The Risk Services Group is comprised of the following staff members: Miguel Delgado, Interim Manager Insurance and Claims; Emilee Soto, J.D., Claims Specialist; Joel Jackson, Claims Specialist; and Joshua Padilla, Professional Intern. Mr. Delgado also serves as the UNM Loss Prevention and Control Coordinator.

The Risk Services Group is responsible for implementing and overseeing the Loss Prevention and Control Program at UNM. The Risk Services Group staffs the Loss Prevention and Control Committee, prepares the Loss Prevention Quarterly Reports and insures that campus stakeholders are meeting loss prevention requirements.

In addition to the loss prevention and control responsibilities, the Risk Services Group staffs the SRS Insurance Committee. This committee was established in Fiscal Year 2015 and is intended to support SRS' role in managing insurance coverage for UNM, UNMH, and SRMC. The Risk Services Group works with the New Mexico General Services Department's Risk Management Division to insure that UNM and its affiliates have the requisite coverage to mitigate risk. These duties include paying insurance premium, allocating premium internally, disputing premium assessments when appropriate, and serving as a liaison with the New Mexico General Services Department, Risk Management Division, or private carriers.

Lastly, the Risk Services Group directly handle workers' compensation claims for UNM, general liability claims for UNM, SRMC, and UNMH and all property claims for UNM and UNMH. This responsibility means that the Risk Services Group responds to all losses large or small. The Risk Services staff frequently handles claims that exceed a million dollars. Further, this staff insures that settlement or claims checks are timely and appropriately distributed to the departments where claims occur.

Occupational Safety

The SRS safety staff is organized into the following groups: Environmental Health Group, Fire Safety Group, General and Construction Safety Group, Chemical Safety Group, and Hazardous Materials Group. SRS oversees numerous occupational safety areas that include construction safety, fire safety, air quality, storm-water, petroleum storage tanks, ergonomics, N-95 fit testing and certification, defensive driving, asbestos testing and abatement, lead and mold testing and abatement, laboratory safety, machine shop safety, hazardous waste disposal, chemical inventory, and training.

III. ACCOMPLISHMENTS

Publications of the Division and Staff

SRS Quarterly Loss & Risk Report
 UNM Stormwater Management Plan
 Loss Prevention and Control Plan
 Chemical Hygiene Plan

Outside Professional Activities of Staff Members

National Safety Council
 National Fire Protection Association (NFPA)
 International Code Council (ICC)
 New Mexico State Bar
 American Society of Safety Engineers (ASSE)
 New Mexico Society of Hazardous Materials Professionals
 University Risk Management Insurance Association
 OSHA Certified Trainer

Certifications and Training

CPCU 500- Foundations of Risk Management & Insurance
 AINS 21- Property and Liability Insurance Principles
 Asbestos Contractor/Supervisor Certification through EPA/AHERA standards
 RCRA Certification
 HAZWOPPER Certification
 DOT Certification
 EPA Method 9 Opacity Certification
 Ergonomics Certification
 N-95 Respirator Fit Testing
 Emergency Response Training
 HazMat Operations for First Responders
 Machine Guarding
 511 Construction 1926 OSHA 30 Hour

IV. CURRENT PROJECTS

Risk Services

The Department of Safety and Risk Services has spent the last year actively advancing the health and safety of the University community through adopting risk management and institutional safety best practices. The following are just a few examples that illustrate the progress SRS has made.

Risk Management and Insurance

One of the most significant events of the year was a departmental audit conducted by the State. The State of New Mexico's Risk Management Division announced in late 2014 that all insured State Agencies would be audited in Spring 2015 in relation to the Loss Prevention and Control NMAC provisions. The Department of Safety and Risk Services assisted in gathering and preparing all required documentation for UNM, UNMH, and SRMC pursuant to the Audit. All three agencies passed the Audit with a score of 96%.

This year has seen the establishment of two new committees: (1) the UNM Insurance Committee, and (2) the Loss Prevention and Control Safety Committee. The UNM Insurance Committee was formed in July 2015. Members were selected/appointed and a Charter was drafted. The purpose of the committee is to review our current insurance coverages, identify potential gaps, and recommend new coverage for loss exposures not otherwise covered. The UNM Insurance Committee is an innovative tool that will help to protect the University in a constantly changing environment that presents constantly changing risks. In the same vein, SRS formed a new committee called the Loss Prevention and Control Safety Committee. This committee focuses on safety programs and measures associated with Loss Prevention and Loss Control.

SRS has continued our process of providing a Quarterly Report to upper management. This report identifies any current trends, issues, and ideas related to risk management and loss prevention. SRS also has continued to plan, organize, and host Quarterly LPCC Meetings to accomplish the same goals. These meetings assist the UNM community with loss prevention and loss control ideas and ensure compliance with the LPCC NMAC. An example of SRS' efforts to address emerging risks is illustrated in our endeavors to protect minors on campus. SRS has provided assistance to the UNM Community in regards to policies formulated to address the issue of minors on campus. This eventually led to the formation of a special task force to draft a new administrative policy. SRS is represented in this task force and participates in several sub-committees.

Safety and Risk Services has assisted a multitude of departments and organizations across the UNM community with evaluating, procuring, and managing various insurance policies and programs, including the following:

- SRS continued to assist the Research Park Corporation with obtaining insurance quotes and procuring necessary insurance not provided by RMD.
- SRS worked with UNMH to procure Terrorism and Crime Insurance Coverage, which is contractually required.
- SRS supported UNM in purchasing Kidnapping and Abduction Insurance Coverage. This insurance covers staff and faculty while traveling on behalf of UNM.
- SRS aided UNM in purchasing Crime coverage, which provides protection for employee dishonesty losses, burglary losses, etc.
- SRS facilitated the purchasing Terrorism coverage. UNM's insurance with RMD has exclusion for damages caused by war, terrorism, etc. This coverage provides protection for those types of losses.
- SRS assisted SRMC with obtaining Property Insurance Coverage at a discounted rate when compared to their previous policy.
- SRS assisted in the process of procuring travel insurance for Students, Faculty, and Staff when traveling away from the University. Travel insurance policies ensure that Students, Faculty, and Staff are protected at all times.

In regards to University-wide insurance coverage and premiums, SRS worked with the purchasing department to design a program that allows SRS to review all requests to purchase insurance. This program ensures that any existing insurance coverages are not duplicated unnecessarily. SRS continued to implement the changes made to our internal premium allocation process. This process allows SRS to allocate portions of our insurance premiums in a fair and equitable manner between our various organizations. SRS worked with RMD to provide required information related to the

Annual Survey. This survey assists RMD with calculating insurance premiums for the next fiscal year. SRS worked to improve this process and ensure that information submitted was accurate and complete.

Throughout the year, our risk staff has processed and handled hundreds of claims across all areas of the University. To do so more efficiently and effectively, SRS developed Standard Operating Procedures for Claims Processing and Investigation. As part of our preparation for the LPCC Audit conducted by the State, SRS updated our SOPs in relation to how we investigate and process new claims. Establishing investigation techniques also helps to ensure that UNM is not held monetarily responsible for fraudulent insurance claims.

Documentation and management of insurance claims has been facilitated this year by SRS' utilization of Time Matters software. All new insurance claims (including Property, Auto, Liability, and Workers' Compensation) are stored in a database called Time Matters. This database provides format consistency and shared access (for authorized users) to the claims records.

To analyze trends in the claims that arise, SRS implemented the process of providing a Quarterly Claims Analysis to upper management. This analysis provides a comprehensive review of all first party claims filed by UNM/UNMH with RMD and all third party claims filed against UNM/UNMH, with the exception of medical malpractice and civil rights claims.

In 2015, SRS handled and assisted with multiple large property losses including the large flood loss occurring on 8/1/2014, the MRI Magnet Claim in May 2014, and the large water/flood loss occurring in the Cancer Center in July 2015.

SRS made major changes to the UNM Ergonomics Program. These changes include an improved website with relevant information to perform self-assessments and the ability to request an in-person evaluation through the website. The Ergonomics Program helps to minimize repetitive motion injuries in administrative positions. In Fiscal Year 2015, SRS provided 71 ergonomic evaluations.

To improve internal functioning and ensure accountability, SRS continued to implement changes and improvements to our check deposit process. These improvements ensure that incoming checks are accounted for, deposited, and then transferred to the appropriate department.

Safety and Environmental Health

Indoor Air Quality

The Department of Safety and Risk Services worked throughout the year to ensure that adequate indoor air quality standards are met. To this end, SRS coordinated with environmental consultants to facilitate inspection and testing on suspect locations and materials for mold or other limited indoor air quality (IAQ) concerns to include fungi, "sick building syndrome," moisture penetration assessment in building materials, and allergen spore count analysis. SRS also administered and coordinated with certified Industrial Hygiene (IH) vendors 45+ tests for mold and other various IAQ issues in 2015. These mold and indoor air quality assessments were catalogued and maintained in SRS archives.

Moreover, SRS provided liaison with IH vendors to consolidate and draft request for quotes, scope of work project management, and scheduling for specific IAQ testing and follow-up remediation scheduling through certified and licensed abatement vendors.

Asbestos

In 2015, SRS administered and coordinated with vendor services to conduct more than 35 asbestos tests. This process includes coordinating with environmental consultants to facilitate inspection and testing on suspect building materials for asbestos content prior to demolition, renovation, or repair for utility and building maintenance services.

SRS coordinated with remodel project managers, building facilities managers, and area maintenance managers to serve as liaison with certified asbestos abatement contractors. Our department conducted request for quotes, scope of work project management, and scheduling coordination for specific asbestos abatement following EPA/AHERA regulations and UNM contract guidelines.

SRS worked with vendor services to execute more than 42 contracts for specific asbestos abatement projects to include floor tile, mastic, drywall, cove-base, transite fume hood panels, air-cell pipe insulation (TSI), ceiling tiles, and rooftop flashing and asphalt shingles.

SRS followed through in obtaining oversight and air quality clearance through laboratory sampling of asbestos work perimeter monitoring on containment areas prior to disengagement and deactivation of contained regulated areas.

One SRS employee was trained and certified as Asbestos Contractor/Supervisor through EPA/AHERA standards; this employee is now responsible for project management of the asbestos program archive and is the asbestos vendor liaison.

Chemical and Laboratory Safety

In the area of Chemical and Laboratory Safety, SRS continued to staff the main campus Chemical and Laboratory Safety Committee and the HSC Chemical Safety Committee. The HSC Chemical Safety Committee is currently reviewing a chemical hygiene plan developed by SRS earlier this year. SRS developed a similar plan for the UNM main campus and it was approved in 2014 by the main campus Chemical and Lab Safety Committee.

SRS completed a re-inventory of the chemicals present on main campus, branch campuses, and satellite campuses, as well as the HSC. SRS continued to provide the training it developed on how to use ERM chemical inventory management software to the labs that have had the inventories completed. This training allows the PIs of the lab the ability to manage the chemical inventories of their labs.

The re-inventory process was facilitated by the development of a student-run chemical inventory management program. This program was successful in cataloging the complete chemical contents of all UNM laboratories. Going forward, this program will expedite the re-inventory process.

The chemical inventory process is important because it provides information about Chemicals of Interest (COIs) currently on campus. Our department collected and compiled information on UNM's COIs for compliance with Department of Homeland Security regulatory requirements.

Finally, SRS implemented preventive maintenance (PM) work orders to verify ERM scanner functionality in the field on an annual basis and to ensure that the ERM scanner inventory is accurate. The ERM scanner allows departments in possession of chemicals to update their inventories instantly.

Hazardous Waste Program

The Department of Safety and Risk Services responded to chemical spills as needed throughout the year. The chemical spill response team is in place and continues to receive training. The team has acquired the necessary personal protective equipment and equipment. In addition, the SRS Hazardous Waste staff completed RCRA, DOT, and HAZWOPER compliance training. The staff also became proficient in data loading of all chemical pick-ups and ensuring that the chemical inventory is valid prior to sending the shipment to RFP.

In effort to prevent future chemical spills, the SRS Hazardous Waste Program has continued to conduct its chemical waste storage area inspections on a weekly basis, and the inspection reports are being filed in a timely manner.

SRS completed the project to renovate the chemical waste warehouse in 2015. The scope of work included recoating the CRC floor; lowering the general exhaust to within 12 inches of ground level in order to exhaust any fumes that are heavier than air; plumbing the chemical cabinets to provide exhaust to the lower part of the cabinet; changing out the cabinet exhaust fan to increase exhaust to the chemical cabinets; and replacing the wood pallets under the chemical cabinets with chemical resistant pallets. The storm-water retention pond was also backfilled as part of this project, and a tank was installed and engineered to collect and pump storm-water as necessary.

In coordination with University Services, SRS conducted audits of bio-contaminated equipment prior to being released to surplus. SRS' recommendations to decontaminate the equipment allowed the equipment to be deemed safe prior to being released to surplus personnel. SRS inventoried all the IH (Industrial Hygiene) equipment, surplused those that were obsolete or underutilized, and will ship the remaining equipment to the manufacturers to be calibrated.

Lastly, six waste shipments were sent out from Safety and Risk Services. No safety issues were raised during these shipments and there have been no chemicals rejected by the waste vendors. All regulatory files have been placed in an "audit ready" format. Additionally, weekly bio-hazardous waste pick-ups by a third party vendor are ongoing. There have been no reportable spills or releases as a result of the weekly shipments.

Fire Safety

The SRS Fire Safety Program has continued efforts to complete fire alarm testing, fire drills, and evacuation maps for all UNM entities.

Fire Suppression Systems

SRS oversees the service, testing, and inspection of all fire suppression systems for all sprinkled buildings at UNM. Further, SRS coordinates the on-call fire suppression system maintenance support service for scheduled maintenance and emergencies.

Fire Extinguishers

SRS reviews and oversees fire extinguisher inspections, replacements and repairs for all UNM buildings to include annual inspections and five year recharge cycles.

SRS facilitates replacement plan for discharged fire extinguishers for buildings and coordinates vendor support for Student Residence Life and other critical areas throughout campus.

Fire Alarm Testing

Fire Alarm TSRS reviews and oversees RFPs for proprietary fire alarm panel vendors in conjunction with elevator inspection and maintenance, fire suppression system vendors, and other UNM entities for coordination and facilitation of fire alarm tests in alarmed buildings.

Scheduling and coordination of fire alarm tests span the course of a year and include cooperation with branch campuses to obtain copies of testing records to satisfy NFPA and New Mexico State Fire Marshal inspection requirements for fire alarm testing frequency.

Fire Drills

SRS developed and implemented a strategy to align fire drills with Clery Act compliance standards for dormitories that require the oversight of fire drills to be conducted at the start of each semester and during off-hours. SRS coordinates with Lobo Village and Casas del Rio management to obtain copies of fire drills and fire safety trainings to comply with Clery Act requirements and maintains liaison with safety committee for fire drill schedules and conduct of fire drills throughout campus.

Fire Inspections

The New Mexico State Fire Marshal continues to work with SRS staff on fire inspections by area. SRS fire safety staff accompany the inspectors and prepare follow up memos to stakeholders to insure corrective action.

Evacuation Maps

In conjunction with fire alarm testing and frequency of fire drills, SRS maintains a database of all evacuation maps placed throughout the campus buildings in main hallways, avenues of egress, and dormitory rooms. SRS audits and revises evacuation maps as necessary to ensure that every building in UNM has a reliable and legible evacuation map posted in key areas.

Fire Safety Training

SRS continues to conduct training in fire safety to include safe egress, fire extinguisher safety, and fire safety awareness. SRS employees have conducted fire safety training for all PPD maintenance and custodial staff and Residence Life RAs.

Environmental Health*Title V Permit*

In Fiscal Year 2015, SRS underwent an environmental audit to improve compliance with UNM's air quality permits under the Clean Air Act. SRS retained two consultants to complete this task, and a final report was presented to the Director of SRS and other campus stakeholders from PPD. SRS is working with other departments, notably PPD and PCD to implement the recommendations of the audit. Air emissions from UNM's permitted emission units continue to be below permitted limits during routine operations.

SRS completed and submitted for approval, significant modifications to UNM's Title V Operating permit for compliance with Air Quality regulations. The modifications removed some insignificant sources from the permit and added new sources.

Watershed Basin Permit

A new watershed-based NPDES permit to replace the existing storm-water permit has been issued by the EPA. UNM has submitted a Notice of Intent to request coverage under this permit. UNM revised its Storm-Water Management Plan (SWMP) to meet the requirements of the new permit. UNM continues to cooperate with the CABQ, NMDOT, and AMAFCA to ensure compliance with the existing NPDES permit requirements for storm-water monitoring and reporting until the new SWMP is approved by the EPA.

UNM operates under a voluntary pollution prevention program with the ABCWUA. The P2 program allows UNM to take proactive measures to reduce pollution discharge into its sanitary sewer which discharges to the ABCWUA sanitary sewer. SRS has submitted for review an updated version of this P2 agreement, which was signed in 2002. The agreement allows UNM to operate outside a formal permit process that requires strict monitoring and reporting. Developing an internal storm-water educational program.

Petroleum Storage Tanks

SRS continues to conduct monthly inspections of UNM's petroleum storage tanks as required by the NMED PST regulations. Two SRS personnel are certified to conduct these inspections. The tanks inspected continue to be in compliance. SRS also ensured that the tanks were registered and fully insured in case of a spill into the environment.

N-95 Fit Testing

SRS provides N-95 and Respirator Training campus wide. In Fiscal Year 2015, SRS provided 932 N-95 and Respirator Fit Tests and Training. SRS also arranges for Self-Contained Breathing Apparatus. To accomplish the high number of requests, SRS worked with HSC leadership to set up group trainings for providers. It also holds trainings twice a week at SRS to accommodate the credentialing schedules for providers. SRS enters all training documentation into Learning Central.

Fume Hood and Biosafety Cabinet Testing and Certification

SRS is responsible for the inspection and certification of fume hoods and biosafety cabinets across campus. Historically, SRS has used CScan to inspect and certify biosafety cabinets. With the assistance of CScan, 213 biosafety cabinets were inspected and certified.

In Fiscal Year 2015, the Director reviewed the fume hood program and instituted a change. SRS entered into a contract with CScan so that this company would conduct chemical fume hood testing and certification. For the past several years, SRS staff had been handling this internally. After investigating whether to continue this practice, the Director deemed that it is a better practice to engage a vendor with training in testing and certification. In Fiscal Year 2015, SRS tested and certified 714 fume hoods.

Defensive Driving

SRS continued its work with the online defensive driving course. SRS staff works with the campus community to grant access to the online course. SRS staff runs driving record background checks to insure that employees have valid licenses and to review other salient information from the driving record.

Safety

Machine Shop Inspections

In Fiscal Year 2015, two SRS employees successfully completed training in OSHA Machine Guarding Standards. These two employees prepared an informational handout that outlines the scope and goal of the SRS Machine Shop Program. SRS developed inspection checklist criteria and initiated a machine shop inspection program launched February 2015. By August 2015, SRS completed initial inspections of all UNM machine shops. As part of the Machine Shop Inspection Program, SRS distributed 43 inspection reports to principal stakeholders with the authority and responsibility to oversee machine shop operations. Presently, SRS is conducting follow-up inspections with an expected date of completion of February 2016.

Safety Analysis and Hazard Mitigation Reports

SRS conducts safety assessments based on the applicable OSHA, fire, life-safety, or building code standard in regard to hazard identification and recommendations for abatement of the specific hazard. Hazard assessment reports generated by SRS create awareness of safety issues and also provide for recommendations to improve the condition through engineering and administrative control measures to help mitigate risk to employees in their daily duties.

Loss Prevention Inspections

SRS complies with the NM Loss Prevention Program through building inspections for Loss Prevention Inspections (LPCs) with emphasis on identifying areas where slip, trip, and fall incidents could likely occur, egress capacity, lighting, and emergency equipment (alarms, smoke detectors, fire extinguishers) are serviceable and ensures hazards have not been introduced into employee work areas. SRS conducts LPC inspections on every UNM building every six months and maintains a database of inspection reports to identify trends and to help educate to mitigate hazards and risk for employees and UNM property.

Accounting

During Fiscal Year 2015, SRS added two positions to Accounting: Manager of Administrative Operations and Financial Analyst. The purpose of these positions is to insure that SRS adheres to SRS and UNM policies and procedures. Accounting prepared standard operating procedures that include Checks Received for Insurance Claims Procedures.

V. FUTURE PLANS/GOALS FY15-16

- Utilize lab inspections program to drive early identification of safety risks and hazard prevention, communications, and training across the University.
- Implement a customer feedback mechanism to assist SRS in providing better customer service.
- Create methodology to measure progress by developing a survey form that could be tracked using a spreadsheet identifying which labs have been inspected. A comments section would capture feedback on SRS customer service.

- Complete UNM comprehensive storm-water monitoring and analysis plan for proposed watershed-based permit.
- Pull UNM from storm-water monitoring cooperative (contingent on funding availability). Complete installation of UNM storm-water monitoring stations and begin storm-water monitoring.
- Update UNM storm-water management plan.
- Submit annual compliance reports pursuant to current MS4 permit.
- Build staff capacity on storm-water
- Fill the Manager, Safety position
- Fill the Safety Specialist position dedicated to laboratory safety
- Bolster the laser safety program
- Host an open house for HSC
- Develop a space to serve as central receiving for chemicals
- Implement and in-house fire extinguisher inspection program
- Create an administrative suite of offices
- Inspect fire hydrants not maintained by Ford Utilities
- Inspect all alarm systems on campus
- Implement the purchase of chemicals via ERM

VI. PERSONNEL/STAFFING INFORMATION

Appointments to Staff

Arthur Bishop, Manager, Administrative Operations
 Michael Withrow, Financial Analyst
 Christopher Gallegos, Accountant III
 Martin Giron, Fire Safety Specialist
 Desiree Monette, EH&S Tech III
 Michael Buchanan, EH&S Tech III
 Louis Gonzales, Fire Suppression Tech

Separation of Staff

Henry Romero, Manager, Hazardous Waste
 Frank Taylor, Manager, Health
 Eddie Enriquez, Safety Specialist
 Tracy Counasse, Claims Specialist
 Delma Baca, Fiscal Services Tech
 Michael Burt, EH&S Tech I



FY 2014-2015 Annual Report

UNM Athletics

Submitted by:

Paul Krebs, Vice President, Athletics

Frank Mercogiano, Asst. A.D., Communications, Athletics

<http://www.golobos.com>

Mission and Vision

Mission

Developing Lobos For Life!

Vision

The University of New Mexico athletics aspires to be the premier athletic program in our Conference and recognized as a national leader in intercollegiate athletics with an international reputation for excellence.

Core Values

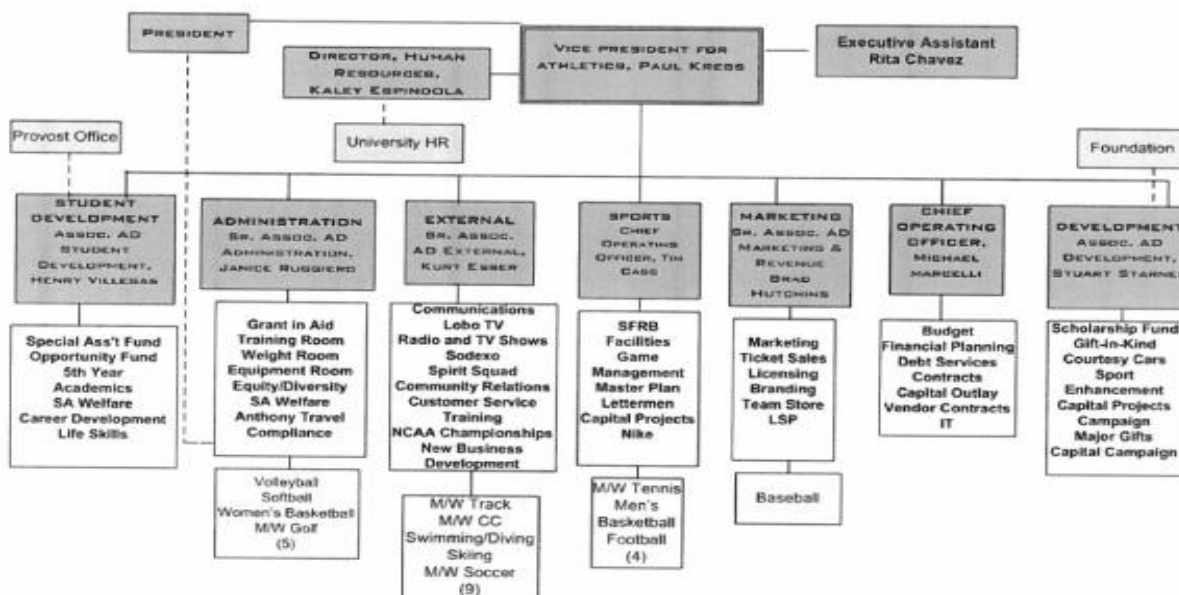
Student Athlete Experience: We provide an environment that promotes personal, academic, athletic, and social development. We prepare Lobos for Life!

Integrity: We are honest, respectful, and accountable.

Excellence: We maximize our efforts and talents to ensure success of the Lobos.

Respect: We value the importance of diversity, fairness, goodwill, and sportsmanship.

Lobo Pride: We support an atmosphere that embraces school spirit, honors tradition, and develops Lobos for Life!



2014-2015 Annual Report**Table of Contents**

I.	Executive Summary	4
II.	Accomplishments	4
III.	Current Projects	20
IV.	Future Plans	20
V.	Appendices	20
	Appendix A: Athletic Department 2015-2020 Strategic Plan	21

I. EXECUTIVE SUMMARY

The AY 2014-15 was another successful one for The University of New Mexico Athletics Department. The program won six conference championships, which ran UNM's total over the last four years to 34, the best four-year run in school history. Overall, 13 of UNM's 22 sports competed in the postseason. In addition, the student-athletes represented the institution well in the classroom and in the community.

II. ACCOMPLISHMENTS

UNM won conference championships in the following sports:

- Men's Cross Country (6th straight title)
- Women's Cross Country (7th straight title)
- Men's Indoor Track and Field (3rd straight title)
- Women's Indoor Track and Field (2nd straight title)
- Men's Tennis (Regular Season)
- Women's Tennis (Conference Tournament)

Sports that advanced to the postseason were (finish indicated):

National Finishes

• Women's Cross Country	NCAAs	3rd
• Men's Cross Country	NCAAs	11 th
• Men's Indoor Track and Field	NCAAs	31st
• Women's Indoor Track and Field	NCAAs	46th
• Skiing	NCAAs	5 th
• Women's Basketball	WBI	T-5 th
• Men's Outdoor Track & Field	NCAAs	36th
• Women's Outdoor Track & Field	NCAAs	T-48 th
• Men's Golf	NCAAs	49 th (Regionals-9 th)
• Men's Tennis	NCAAs	T-33rd
• Women's Tennis	NCAAs	T-33 rd

*Women's Golf had only an individual participant in the postseason.

UNM finished 58th in the final Learfield Director's Cup standings, the sixth consecutive year that the Lobos finished in the top 60. The Lobos finished as the top Mountain West school for a fourth consecutive year.

The Lobos picked up 423.5 points to finish in 58th place, which was the sixth highest non-Power 5 Conference finish among all institutions. The Lobos earned points from men's golf, men's track and field, women's track and field, men's tennis and women's tennis in the spring. The Lobos picked up 135 spring points after getting 142 in the winter and 146.5 in the fall.

The Lobo student-athletes again were active in the community, as the student-athletes, including the spirit squad, logged over 6,000 hours of community service, the fifth consecutive year with at least 6,000 hours.

Three programs ranked among the top 25 in attendance in men's basketball, women's basketball, and men's soccer, while three others (baseball, women's soccer, and volleyball) were in the top 50. The men's basketball team finished in the top 25 in attendance for the 49th straight year.

Academics

UNM Athletic NCAA Graduation Success Rate (GSR) was 76% for 2014 (this factors in transfer students and mid-year enrollees). In Spring 2015 UNM Student-Athletes scored a 3.24 cumulative GPA, nearly matching the all-time high of 3.25 that was achieved in Fall 2013 and Spring 2014. It marked the seventh consecutive semester in which UNM Student-Athletes have achieved at least a 3.20 grade point average.

Lobo Female Student-Athletes had a record high 3.52 GPA in Spring 2015, just 0.01 behind the record mark of 3.53 set in Spring 2014. This marked the tenth consecutive semester that UNM's Female Student-Athletes have garnered a cumulative GPA of 3.40 or better and the 16th straight semester of a 3.30 or better. UNM's Female Student-Athletes have now had a cumulative GPA of 3.0 or better for 34 straight semesters.

Lobo Male Student-Athletes earned a cumulative GPA of 3.01 for Spring 2013 semester. This is the seventh consecutive semester the Lobo Men have had a GPA of a 3.0 or higher. Spring 2012 was the first semester in school history that the men had a term GPA above a 3.0.

The Mountain West 2014-15 Scholar-Athlete Award honored a conference-high 112 UNM Student-Athletes. The award is one of the highest academic honors bestowed by the Conference. To be eligible, Student-Athletes must have completed at least two academic terms at the member institution, while maintaining a cumulative grade point average of 3.5 or better and have participated in varsity competition in an NCAA sponsored sport.

New Mexico led the Mountain West in 2014-15 Academic All Conference Awards as 189 Student-Athletes were honored. In addition, many Lobo individual sports led the conference, including women's cross country, women's soccer, men's basketball, women's basketball, men's golf, softball, and men's tennis. The award recognizes Student-Athletes who have completed one academic term at the member institution while maintaining a cumulative grade point average of 3.0 or better, and who started or were significant contributors on their athletic teams.

For the fifth consecutive year, UNM had all 21 sports above the mandated 930 mark in the NCAA Academic Progress Rate Institutional Report, released publicly by the NCAA today. The 2013-14 report does not contain sand volleyball, which began this past academic year.

APR is a combination of eligibility and retention scores. For each semester, a Student-Athlete can account for two points, one for returning to school, and one for being eligible. The total points accumulated is divided by the total points possible, and then multiplied by 1,000 to get the raw score.

All 21 of UNM's sports were easily above the 930 mark established by the NCAA, and in fact, 19 of the 21 sports were above 964. Five sports, men's golf, men's tennis, women's golf, women's tennis and softball had perfect 1,000s for the 2013-14 single-season report.

Women's tennis, men's tennis women's cross country and women's golf had perfect four-year scores of 1,000, while nine others scored in a 980s or 990s (women's indoor track 996, women's outdoor track 996, women's soccer 991, men's golf 987, men's skiing 987, men's basketball 985, women's skiing 984, men's indoor track 983 and women's swimming & diving 981.

The NCAA recognized men's tennis, women's tennis, women's cross country, and women's golf for having APR scores in the top 10 percent in the nation for their sports. The UNM Athletic Department celebrated 59 student-athlete graduates in Spring 2015 and 29 in Fall 2014 for a total of 88 over the AY 2014-15.

Two Academic All-Americans were honored this past year: Josh Dye of men's soccer (Second Team) and Peter Callahan of men's track & field (First Team). It marked the 14th consecutive year that UNM had two student-athletes earn CoSIDA Academic All-American honors. Overall they were the 90th and 91st CoSIDA Academic All-Americans in school history.

16 student-athletes earned Academic All-District honors:

Dakota Cox	Football	
Reece White	Football	
Garrett Adcock	Football	
Cassie Ulrich	Women's Soccer	Second Team
Dylann O'Connor	Women's Soccer	Second Team
Josh Dye	Men's Soccer	
Niko Hansen	Men's Soccer	
Nick Miele	Men's Soccer	
Chris Wehan	Men's Soccer	
Alex Estrella	Baseball	
Brandi Heimburg	Softball	
Christian Otto	At-Large (Skiing)	
Sam Iftikhar	At-Large (Men's Tennis)	
Peter Callahan	Men's Track & Field	
Alice Wright	Women's Track & Field	
Sammy Silva	Women's Track & Field	

UNM recognized 293 Student-Athletes as a part of the 2014-15 Scholar-Athlete Banquet. The event recognizes Student-Athletes who have achieved excellence in the classroom and on the playing field with a cumulative GPA of 3.20 or higher.

Former UNM Scholar-Athlete and placekicker Katie Hnida addressed the student-athletes as a part of the Lobo Leadership Institute. The Institute brings former Student-Athletes, who have achieved a high level of success in their careers and lives, to campus to inform and inspire current Student-Athletes.

Fundraising and Financials

Athletics is proud that over 75% of the UNM athletics budget is self-generated. Ticket sales, advertising sales, Lobo Club donations for scholarships, and gift-in-kind make up a large majority of the self-generated amount.

The Lobo Club had 4,150 members for 2014-15, and raised approximately \$14.7 million in restricted and unrestricted cash, utilized gift-in-kind, and major gift pledges to support UNM Athletics (included in that total is \$3.05 million in the Lobo Scholarship Fund). A total of nearly 300 gift-in-kind partners pledged over \$3 million, a total that includes numerous local businesses.

Significant Developments

UNM had facility and digital improvements in 2014-15. Facility-wise, a new football-only weight room expansion opened, with the resulting video of the unveiling becoming one of the most viewed YouTube videos on UNM's official playlist. In addition, the weight room unveiling was featured on ESPN and CBS during their college football programming.

There were other smaller facility improvements, including completion of the restroom project that serves the McKinnon Family Tennis Stadium, Lobo Baseball Field, and Lobo Softball Field.

Digitally, UNM successfully hosted the 2015 Mountain West Tennis Championships, broadcasting every match on Campus Insiders/Mountain West Network. UNM was the first school to ever undertake the task of broadcasting every match of the entire men's and women's tournament, using a unique four-camera set-up, broadcasters, and sideline reporters, and whip-around coverage that allowed the broadcast to focus on the most meaningful matches. The resulting media coverage made its way via NCAA channels and received major accolades from the tennis community including the ITA and the USTA.

The McKinnon Family Tennis Stadium was the only collegiate facility to earn a USTA Facility Award for 2015.

New Mexico's Twitter presence increased nearly 67%, jumping from 21,000 followers to just over 33,000 followers. New Mexico's Facebook page now has over 75,000 likes. Every program for UNM now has a presence on social media, and Athletics launched an infographic initiative where game/match results are sent out via Instagram and Twitter in photo form that has proven popular. UNM's Instagram infographics for post-game results are some of UNM Athletics' most popularly shared social media forms.

Along with hosting the 2015 Men's and Women's Mountain West Tennis Championships, UNM once again served as the host institution for the 2015 Men's and Women's Mountain West Indoor Track and Field Championships.

Staff Appointments

The University of New Mexico added several staff members in 2014-15:

- Academics: Derek Johnson, Student Success Manager for Football
- Academics: Keyana Smith, Student Success Manager for Men's Basketball, Softball
- Academics: Jesse Duran, Football Advising Intern
- Academics: James Gehrke, Learning Specialist Intern

- Athletic Performance: Carla Garrett, Women's Basketball Athletic Performance Coach
- Athletic Performance: Brett Nakashima, Olympic Sports Athletic Performance Coach
- Baseball: Tony Cappuccilli: Volunteer Assistant Coach
- Men's Basketball: Chris Harriman, Associate Head Coach
- Men's Basketball: Terance Rencher, Assistant Coach
- Men's Basketball: Chris Birmingham, Administrative Assistant (transfer from football)
- Compliance: Austin Brobst, Director of Compliance
- Lobo Club: Stuart Starner, Senior Associate A.D. for Development
- Lobo Club: Kole McKamey, Assistant A.D. for Major Gifts
- Football: Clay Davie, Tight Ends Coach (promotion from graduate assistant-offense)
- Football: Al Simmons, Cornerbacks Coach
- Football: Trent Martin, Director of Player Development
- Football: Evan Barker, Assistant Director of Operations
- Football: LaMar Bratton, Graduate Assistant-Offense
- Football: Mitchell Kleinschrodt, Graduate Assistant-Offense
- Football: Andrew Aho, Graduate Assistant-Defense
- Football: Ivan Cordova, Graduate Assistant-Defense
- Men's Golf: Drew McGee, Assistant Coach
- Lobo Sports Properties, David Fatzinger, Account Executive
- Lobo TV: Stephen Williams, Assistant Producer
- Skiing: Mark Miller, Assistant Coach
- Women's Soccer: Heather Dyché, Head Coach
- Women's Soccer: Missy Strasburg, Assistant Coach
- Women's Soccer: Karley Nelson, Assistant Coach
- Women's Soccer: Brad Keller, Director of Operations
- Spirit Program: Jessie Truitt, Large Co-Ed Cheer Coach
- Spirit Program: Madison Warren, Small Co-Ed Cheer Coach (Additional duties)
- Spirit Program: Cosmic Narvaiz, Small Co-Ed Cheer Coach
- Swimming & Diving: Jake Tapp, Assistant Swimming Coach
- Swimming & Diving: Katelyne Herrington, Director of Operations
- Women's Tennis: Kelcy McKenna, Head Coach (promoted from Associate Head Coach)
- Women's Tennis: Amy Sargeant, Assistant Coach
- Cross Country/Track & Field: Rodney Zuyderwyk, Associate Head Coach (promoted from Asst.)
- Cross Country/Track & Field: James Butler, Assistant Coach
- Cross Country/Track & Field: Jade Ellis, Assistant Coach
- Cross Country/Track & Field: Laura Bowerman, Assistant Coach
- Athletic Training: Corey DeBarbrie, Assistant Athletic Trainer for Men's Basketball
- Athletic Training: Keith Cross, Graduate Assistant Athletic Trainer for Men's Soccer
- Athletic Training: Kate Zimmerman, Graduate Assistant Athletic Trainer for Volleyball
- Athletic Training: Alexandra Shoup, Graduate Assistant Athletic Trainer for Swimming & Diving

- Athletic Training: Sarah Bair, Graduate Assistant Athletic Trainer for Track and Field
- Athletic Training: Jeremy Cobb, Graduate Assistant Athletic Trainer for Football
- Athletic Training: Michael Waller, Graduate Assistant Athletic Trainer for Football/Track & Field
- Athletic Training: Kaylah Nieschwitz, Graduate Assistant Athletic Trainer for Softball
- Athletic Training: Krystal Gomez, Graduate Assistant Athletic Trainer for Men's & Women's Tennis
- Athletic Training: Heidi Haller, Graduate Assistant Athletic Trainer for Women's Soccer
- Athletic Training: Elizabeth Garcia, Graduate Assistant Athletic Trainer for Dance & Football

As a whole, Athletics is proud of the athletic and academic successes that occurred during the AY 2014-15, and will continue to strive to represent UNM, the city of Albuquerque, and the state of New Mexico in the highest possible manner.

Women's Soccer (Kit Vela, Head Coach) * 10-6-2, 7-2-2 MW

- Named Heather Dyche, an Albuquerque native as the new head coach after the season. Dyche played collegiately at Florida State.
- Finished in the top-15 in attendance among NCAA schools.
- Emily Chavez, Dylann O'Connor, and Cassie Ulrich were named Second Team All-Mountain West
- Ulrich and O'Connor were named Capital One/CoSIDA Second Team Academic All-District.
- Went undefeated in true road games (4-0-1) for first time in school history.
- The Lobos had 15 Mountain West All-Academic selections, leading the Mountain West for a fifth straight season.

Men's Soccer (Jeremy Fishbein, Head Coach) * 11-6-1, 4-4-0 Conference USA

- Ranked in the Top 25 for most of the season.
- Team went 7-1-1 in non-conference play, losing only to No. 1 UCLA 2-1
- Six All-Conference USA selections in Chris Wehan, Ben McKendry, Matthew Gibbons, Nick Miele, James Rogers, and Niko Hansen
- Oniel Fisher and James Rogers were drafted by the MLS, and Ben McKendry signed a free agent contract.
- 24 players qualify for the C-USA Academic Honor Roll, most among C-USA soccer programs.
- Josh Dye was named a Second Team Capital One/CoSIDA Academic All-America, and he, Miele, Hanson, and Dye were Academic All-District, the most for the program since 2007.
- Finished 10th in NCAA in attendance.

Football (Head Coach Bob Davie) * 4-8, 2-6 MW

- Finished fourth nationally in rushing yards, making UNM the only NCAA team to have finished in the top five and average 300 yards each of the last three years.
- Had its most wins and conference wins since the 2007 season.

- Dakota Cox led the nation in tackles per game and Jhurell Pressley led the nation in yards per carry.
- Pressley had more 60-yard runs on his own (5) than all but four teams in the NCAA.
- Lowered its defensive points allowed by almost 20%.
- 20 Mountain West All-Academic selections, third-highest total in the Mountain West and a program record.

Volleyball (Head Coach Jeff Nelson) * 19-12, 11-7 MW

- Chantale Riddle was named Honorable Mention AVCA All-America.
- Riddle was named the Sports Imports/AVCA National Player of the Week, only the ninth honor in Mountain West history.
- Julia Warren and Chantale Riddle were named All-Mountain West, and Cassie House and Hannah Johnson were named Honorable Mention.
- Riddle broke the Mountain West records for career points and kills.
- Devanne Souers and Julia Warren and head coach Jeff Nelson competed in Europe with the Mountain West All-Stars.
- Had eight Mountain West All-Academic selections, the third-highest total in program history.

Men's Cross Country (Head Coach Joe Franklin)

Mountain West Conference Champions * 14th at NCAA Championships

- The team won its sixth consecutive Mountain West Championship.
- Joe Franklin was named Men's MW Cross Country Coach of The Year for the fourth straight year.
- Matthew Bergin, Alex Cornwell, Ross Matheson, and Jake Shelley were all named First Team All-Mountain West, and Elmar Engholm, and Daniel Studley were named Second Team.
- Hosted 2014 NCAA Mountain Regional Women's Championships; will host again in 2015.
- Had eight Mountain West All-Academic selections, second in the Mountain West, the fourth straight year of at least seven honorees.

Women's Cross Country (Head Coach Joe Franklin)

Mountain West Conference Champions * 3rd at NCAA Championships

- The team won its seventh consecutive Mountain West championship.
- Finished third at the NCAA Championships, the highest finish ever for a women's sport at The University of New Mexico.
- Joe Franklin was named Women's MW Cross Country Coach of The Year for the seventh straight year.
- Charlotte Arter, Calli Thackery, and Alice Wright were all named First Team All-MW, with Tamara Armoush, Nicole Roberts, and Amber Zimmerman named Second Team.
- Alice Wright and Charlotte Arter earned NCAA All-American honors.
- Hosted 2014 NCAA Mountain Regional Women's Championships; will host again in 2015.
- The Lobos had nine Mountain West All-Academic selections, leading the Mountain West, and UNM the only Mountain West program with eight or more in each of the last eight years.

Swimming & Diving (Head Coach Kunio Kono) * 8th in MW

- Earned Scholar All-America honors from the College Swimming Coaches Association of America. It marks the 10th straight semester that UNM has been honored by the CSCAA.
- Morgan Ginnis, Anna Lengyel, and Kaela McKee all earned All-Conference honors.
- The Lobos had 23 Mountain West All-Academic selections, making UNM the only Mountain West program with 20 or more in each of the last four years.

Men's Basketball (Head Coach Craig Neal) * 15-16, 7-11 MW

- Senior Hugh Greenwood started “The Pink Pack” to raise funds for breast cancer research with proceeds going to UNMH. To date he has raised over \$60,000.
- Greenwood played for Australia in the World University Games, and he was also named to the NABC All-District team as well as All-Mountain West.
- Lobos led the Mountain West in attendance averaging 14,571. It was the 49th straight year in the top 25 for the Lobos, who finished 18th in NCAA in attendance.
- Seven Mountain West All-Academic selections, giving UNM 13 under Craig Neal in two seasons after having 14 the previous six seasons. In addition, the seven were the most by any Mountain West men's basketball team since BYU had eight in 2006-07.

Women's Basketball (Head Coach Yvonne Sanchez) * 21-13, 14-4 MW***Mountain West Tournament Runners-Up***

- The Lobos advanced to the postseason for the first time since 2010, getting to the quarterfinals of the WBI.
- The team won 20 games for the first time since the 2008-09 season and set a school record with 14 conference wins.
- Team honored by the WBCA for finishing in the top 25 academically for a eighth straight season.
- Team finished 16th nationally in attendance and UNM led the Mountain West in attendance for the 16th straight season.
- Anteisha Brown was named All-Mountain West and All-Defense, Cherise Beynon was named to the All-Freshman team, and Yvonne Sanchez was named Coach of the Year.
- Had 10 Mountain West All-Academic selections, which tied for the second-most in program history.

Skiing (Head Coach Fredrik Landstedt) * 3rd in RMISA***5th in NCAA Championships***

- UNM was the only school with two individual NCAA champions as Emilie Cedervärn won the NCAA title in the Nordic Classical and Mateja Robnik won the giant slalom.
- The Lobos had nine All-Americans in 11 events: Armin Triendl, Eva Sever Rus (two), Sean Horner (two), Mats Resaland, Karoline Mykelbust, Aku Nikander, Mateja Robnik, and Aljaz Praznik.
- The Lobos finished fifth nationally, the program's 32nd straight top-10 national finish.
- Cedervärn was named the RMISA Female Nordic Athlete of the Year after setting a school record for four straight wins and five wins on the season.
- Christian Otto earned Capital One/CoSIDA First Team Academic All-District honors.
- The Lobos had 13 named to the National Collegiate All-Academic Ski Team.

Softball (Head Coach Erica Beach) * 29-25, 13-11 MW

- The team's 29 wins were the most under Erica Beach and the 13 conference wins were the second-most in school history.
- The team finished fourth in the Mountain West, the best finish since a fourth place finish in 2007 when the league had just six teams.
- Brandi Heimburg earned Capital One/CoSIDA Academic All-District honors.
- Heimburg was named First Team All-Mountain West and Mariah Rimmer was named Second Team.
- Led all MW softball teams for the third straight season with 12 Mountain West All-Academic selections. The 12 tied a program and Mountain West record.

Men's Tennis (Head Coach Bart Scott) * 20-11, 6-1 MW***Mountain West Regular Season Champions***

- Won the Mountain West regular season title for the first time since 2008 and qualified for the NCAA Tournament for the first time since 2009.
- Advanced to the NCAA Tournament, playing Oklahoma State.
- Bart Scott was named Mountain West Coach of the Year in his first season as a head coach.
- Samir Iftikhar was named a First Team Capital One/CoSIDA All-District.
- Had eight Mountain West All-Academic selections to lead the Mountain West for the fourth straight year. The eight tied a school and MW record as UNM also had eight in 2012-13.

Women's Tennis (Head Coach Erica Perkins Jasper) * 16-10, 4-2 MW***Mountain West Tournament Champions***

- Defeated Wyoming 4-2 in the Mountain West Championship match, giving the program its first conference title in school history.
- Advanced to the NCAA Tournament, playing LSU. It was UNM's first tournament appearance since 2006.
- Natasha Smith and Emily Olivier both earned All-Mountain West honors.
- The team was named an ITA All-Academic squad with four players: Rachana Bhat, Dominique Dulski, Dalina Dahlmans, and Meredith Hopson were named ITA Scholar-Athletes.
- Erica Perkins Jasper was named ITA Region Coach of the Year.
- Had five Mountain West All-Academic selections, which kept up UNM's amazing streak as the Lobo women's tennis team is the only Mountain West women's tennis program with at least five selections in all 13 years of the All-Academic team's existence

Men's Golf (Head Coach Glen Millican)***Mountain West Champions; 6th at NCAA Regionals***

- The team won its second straight Mountain West Tournament title, and Gavin Green won medalist honors.
- Green was named All-Mountain West along with Sean Romero and Sam Saunders. Green won three tournaments during the year giving him a UNM career record of eight.
- Green was named the Mountain West Player of the Year for the second straight season, joining Tim Herron as the only Lobos to turn that trick.

- Green was named a First Team Ping All-American giving him All-America honors three straight years.
- Team finished 12 shots out of the NCAA Championships after advancing to the NCAA Regionals.
- Team finished the season ranked No. 23 and was in the top 25 all season.
- Had six Mountain West All-Academic, tied for league lead. That also tied for second-most in school history behind the 2008-09 squad which had eight.

Women's Golf (Head Coach Jill Trujillo)

Mountain West Championship Runners-Up.

- The Lobos finished second at the Mountain West Championships
- Manon Mollé won the Mountain West Individual Medalist honors after a birdie on the first hole of the sudden death playoff.
- Mollé was named Second Team All-Mountain West for the second straight year and she represented UNM at the NCAA Regionals.
- The program was given public recognition by the NCAA for its APR performance for the second straight year.
- Mollé competed in the World University Games.
- Had five Mountain West All-Academic, tied for third in the Mountain West. The women's golf program is the only Mountain West program with at least five Academic All-Conference selections each of the last nine years.

Baseball (Head Coach Ray Birmingham) * 32-27, 20-10 MW

Mountain West Tournament Runners-Up

- Finished in the top-10 in NCAA hitting for the fourth straight year and sixth time in the last seven. The four straight finishes in the top-10 can only be matched by one other team since 1989.
- Cory Voss was named Co-Mountain West Freshman of the Year, giving UNM two straight Rookie of the Year awards. Toller Boardman and Danny Collier were named First Team All-Mountain West and Jack Zoellner and Carl Stajduhar named Second Team.
- Toller Boardman (22nd, Detroit Tigers) and Sam Haggerty (24th, Cleveland Indians) were both selected in the 2015 MLB Entry Draft.
- The Lobos advanced to the Mountain West Championship game despite a lineup of seven underclassmen.
- Voss, Stajduhar, and Tyler Stevens were all named Louisville Slugger Freshmen All-Americans by Collegiate Baseball Newspaper.
- Had 13 Mountain West All-Academic honors, making UNM the only baseball program with double-digit honorees over the last three seasons.

Track & Field (Head Coach Joe Franklin)

Mountain West finishes of 1st (Men's Indoor), 1st (Men's Outdoor)

2nd (Women's Indoor), 3rd (Women's Outdoor)

NCAA Finishes of 31st (Men's Indoor), 36th (Men's Outdoor)

NCAA Finishes of 46th (Women's Indoor), 48th (Women's Outdoor)

- The men's team won its third consecutive indoor conference championship and the women's team won its second straight indoor conference championship.
- Adam Bitchell was the Mountain West Men's Indoor Track and Field Student-Athlete of the Year.
- Joe Franklin was named the Mountain Region Women's Indoor Track and Field Coach of the Year.
- Adam Bitchell, Allan Hamilton, and Sammy Silva earned All-America honors indoors and Logan Pflibsen, Peter Callahan, Calli Thackery, and Alice Wright earned All-America honors outdoors.
- Peter Callahan, Alice Wright, and Sammy Silva were all named Capital One/CoSIDA First Team All-District, with Callahan earning First Team Academic All-America.
- The men's squad finished seventh in the "Program of The Year" race while women's program finished 14th.
- The women's team had 25 Mountain West All-Academic honors, the most since 2009 and second-most in program history, and the men's program had 17, the highest program total in five years.

Beach Volleyball (Jeff Nelson, Head Coach) * 3-11

- Debuted as the 22nd sport at New Mexico in 2015.
- Defeated TCU 5-0 for the program's first win, coming at a neutral site match in Phoenix.
- Went 2-2 at home, including a pair of 5-0 wins over Colorado State.
- Team of Julia Warren and Eastyn Baletto went 6-6 at No. 3, the top mark for the Lobos.

Below is a list of other individual honors earned by the Lobos this past year.

Conference Players of the Year/Individual Honors (7)

Chantale Riddle	Volleyball, Preseason
Carlos Wiggins	Football, Preseason
Adam Bitchell	Men's Indoor T&F
Emilie Cedervärn	Skiing, Nordic Skier of the Year
Bart Van Leijsen	Men's Tennis, Freshman of the Year
Gavin Green	Men's Golf
Cory Voss	Baseball, Co-Freshman of the Year

National Champion (2)

Mateja Robnik	Skiing, Giant Slalom
Emilie Cedervärn	Skiing, Nordic Classical 15K

Region or District Players of the Year/Individual Honors (4)

Alice Wright	Women's Cross Country
Natasha Smith	Women's Tennis (Most Improved)
Bart Van Leijsen	Men's Tennis Rookie of the Year
Hayden Sabatka	Men's Tennis Player to Watch

Region or District Coach of the Year/Individual Honors (3)

Joe Franklin	Women's Indoor T&F
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Erica Perkins Jasper	Women's Tennis
Ben Dunbar	Men's Tennis (Asst. of the Year)

Conference Coach of the Year (4)

Joe Franklin	Men's XC
Joe Franklin	Women's XC
Yvonne Sanchez	Women's Basketball
Bart Scott	Men's Tennis

Conference Players of the Week (46)

Dakota Cox	Football, <i>Defensive Player of the Week</i>
Kimmie Carson	Football, <i>Defensive Player of the Week</i>
Charlotte Arter	Women's Cross Country
Adam Bitchell	Men's Cross Country
Chantale Riddle	Volleyball
Chantale Riddle	Volleyball
Ruth Bruciaga	Women's Soccer, <i>Offensive Player of the Week</i>
Dylann O'Connor	Women's Soccer, <i>Offensive Player of the Week</i>
Emily Chavez	Women's Soccer, <i>Offensive Player of the Week</i>
Cassie Ulrich	Women's Soccer, <i>Defensive Player of the Week</i>
Deshawn Delaney	Men's Basketball
Antiesha Brown	Women's Basketball
Antiesha Brown	Women's Basketball
Aasha Marler	Women's Indoor T&F, <i>Field Athlete of the Week</i>
Ridge Jones	Men's Indoor T&F, <i>Track Athlete of the Week</i>
Sammy Silva	Women's Indoor T&F, <i>Track Athlete of the Week</i>
Calli Thackery	Women's Indoor T&F, <i>Track Athlete of the Week</i>
Sammy Silva	Women's Indoor T&F, <i>Track Athlete of the Week</i>
Elmar Engholm	Men's Indoor T&F, <i>Track Athlete of the Week</i>
Django Lovett	Men's Indoor T&F, <i>Field Athlete of the Week</i>
Adam Bitchell	Men's Indoor T&F, <i>Track Athlete of the Week</i>
Alice Wright	Women's Indoor T&F, <i>Track Athlete of the Week</i>
Mateja Robnik	Skiing
Emilie Cedervärn	Skiing
Mats Resaland	Skiing
Sydney Staples	Skiing
Logan Pflibsen	Men's Outdoor T&F, <i>Field Athlete of the Week</i>
Calli Thackery	Women's Outdoor T&F, <i>Track Athlete of the Week</i>
Allan Hamilton	Men's Outdoor T&F, <i>Field Athlete of the Week</i>
Allan Hamilton	Men's Outdoor T&F, <i>Field Athlete of the Week</i>
Hayden Sabatka	Men's Tennis
Sam Iftikhar	Men's Tennis
Natasha Smith	Women's Tennis
Gavin Green	Men's Golf, <i>Monthly Winner</i>
Gavin Green	Men's Golf, <i>Monthly Winner</i>
Gavin Green	Men's Golf
Sam Saunders	Men's Golf
Cory Voss	Baseball, <i>Hitter of the Week</i>

Jake Cole	Baseball, <i>Pitcher of the Week</i>
Tyler Stevens	Baseball, <i>Pitcher of the Week</i>
Tollar Boardman	Baseball, <i>Pitcher of the Week</i>
Carl Stajduhar	Baseball, <i>Hitter of the Week</i>
Lane Milligan	Baseball, <i>Hitter of the Week</i>
Lauren Soles	Softball, <i>Pitcher of the Week</i>
Carrie Sheehan	Softball, <i>Pitcher of the Week</i>
Jasmine Casados	Softball, <i>Hitter of the Week</i>

First Team All-Conference (83)

LaMar Bratton	Football, <i>Preseason</i>
Carlos Wiggins	Football, <i>Preseason</i>
Dakota Cox	Football
LaMar Bratton	Football
Matthew Bergin	Men's Cross Country
Alex Cornwell	Men's Cross Country
Ross Matheson	Men's Cross Country
Jake Shelley	Men's Cross Country
Charlotte Arter	Women's Cross Country
Calli Thackery	Women's Cross Country
Alice Wright	Women's Cross Country
Julia Warren	Volleyball
Chantale Riddle	Volleyball
Chris Wehan	Men's Soccer
Ben McKendry	Men's Soccer
Antiesha Brown	Women's Basketball
Adam Bitchell	Men's Indoor T&F, <i>Mile; 3,000 Meter; 5,000 Meter</i>
Warrick Campbell	Men's Indoor T&F, <i>Triple Jump</i>
Elmar Engholm	Men's Indoor T&F, <i>Mile</i>
Allan Hamilton	Men's Indoor T&F, <i>Long Jump; Triple Jump</i>
Edwin Herring	Men's Indoor T&F, <i>800 Meter</i>
Ridge Jones	Men's Indoor T&F, <i>60 Meter</i>
Django Lovett	Men's Indoor T&F, <i>High Jump</i>
Ross Matheson	Men's Indoor T&F, <i>Mile</i>
Yannick Roggatz	Men's Indoor T&F, <i>Long Jump</i>
Chris Graham	Men's Indoor T&F, <i>Distance Medley Relay</i>
Cheyne Dorsey	
Adam Monroe	
Ross Matheson	
Tamara Armoush	Women's Indoor T&F, <i>800 Meter</i>
Samantha Bowe	Women's Indoor T&F, <i>Pentathlon</i>
Sophie Connor	Women's Indoor T&F, <i>Mile</i>
Jannell Hadnot	Women's Indoor T&F, <i>Triple Jump</i>
Aasha Marler	Women's Indoor T&F, <i>Triple Jump</i>
Sammy Silva	Women's Indoor T&F, <i>800 Meter; Mile</i>
Calli Thackery	Women's Indoor T&F, <i>3,000 Meter</i>
Holly VanGrinsven	Women's Indoor T&F, <i>400 Meter; 60 Hurdles</i>
Alice Wright	Women's Indoor T&F, <i>3,000 Meter; 5,000 Meter</i>

Haley Sanner	Women's Indoor T&F, <i>4x400 Relay</i>
Zoe Howell	
Faith Cobb	
Holly VanGrinsven	
Nicola Hood	Women's Indoor T&F, <i>Distance Medley Relay</i>
Kelsi Lewis	
Emily Hosker-Thornhill	
Nicole Roberts	
Emilie Cedervärn	Skiing, <i>Nordic</i>
Mateja Robnik	Skiing, <i>Alpine</i>
Mats Resaland	Skiing, <i>Nordic</i>
Kaela McKee	Swimming and Diving
Anna Lyngyel	Swimming and Diving
Morgan Ginnis	Swimming and Diving
Sam Iftikhar	Men's Tennis, <i>Singles</i>
Hayden Sabatka	Men's Tennis, <i>Singles</i>
Hayden Sabatka	Men's Tennis, <i>Doubles</i>
Bart Van Leijsen	
Natasha Smith	Women's Tennis, <i>Singles</i>
Emily Olivier	Women's Tennis, <i>Singles</i>
Gavin Green	Men's Golf
Sam Saunders	Men's Golf
Sean Romero	Men's Golf
Brandi Heimburg	Softball
Danny Collier	Baseball
Tollar Boardman	Baseball
Allen Hamilton	Men's Outdoor T&F, <i>Long Jump; Triple Jump</i>
Scott Bajere	Men's Outdoor T&F, <i>100 Meter</i>
Matt Bergin	Men's Outdoor T&F, <i>10,000 Meter</i>
Peter Callahan	Men's Outdoor T&F, <i>1,500 Meter</i>
Beau Clifton	Men's Outdoor T&F, <i>Javelin</i>
Michael Ellis	Men's Outdoor T&F, <i>Javelin</i>
Elmar Engholm	Men's Outdoor T&F, <i>3,000 Meter Steeplechase</i>
Django Lovett	Men's Outdoor T&F, <i>High Jump</i>
Allan Hamilton	Men's Outdoor T&F, <i>4x400 Relay</i>
Scott Bajere	
Ridge Jones	
Carlos Wiggins	Women's Outdoor T&F, <i>1,500 Meter; 5,000 Meter</i>
Calli Thackery	Women's Outdoor T&F, <i>10,000 Meter; 5,000 Meter</i>
Alice Wright	
Janell Hadnot	Women's Outdoor T&F, <i>Triple Jump</i>
Tamara Armoush	Women's Outdoor T&F, <i>1,500 Meter</i>
Casey Dowling	Women's Outdoor T&F, <i>Long Jump</i>
Nicola Hood	Women's Outdoor T&F, <i>3,000 Meter Steeplechase</i>
Holly VanGrinsven	Women's Outdoor T&F, <i>400 Meter Hurdles; 100 Meter Hurdles</i>

Second Team All-Conference (18)

Elmar Engholm	Men's Cross Country
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Daniel Studley	Men's Cross Country
Tamara Armoush	Women's Cross Country
Nicole Roberts	Women's Cross Country
Amber Zimmerman	Women's Cross Country
Emily Chavez	Women's Soccer
Dylann O'Connor	Women's Soccer
Cassie Ulrich	Women's Soccer
Mattie Gibbons	Men's Soccer
James Rogers	Men's Soccer
Nick Miele	Men's Soccer
Eva Sever Rus	Skiing, <i>Nordic</i>
Sydney Staples	Skiing, <i>Alpine</i>
Aljaz Praznik	Skiing, <i>Nordic</i>
Aku Nikander	Skiing, <i>Nordic</i>
Mariah Rimmer	Softball
Jack Zoellner	Baseball
Carl Stajduhar	Baseball

Third Team All-Conference (2)

Niko Hansen	Men's Soccer
Hugh Greenwood	Men's Basketball

Freshman All-Conference (1)

Cherise Beynon	Women's Basketball
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Honorable Mention All-Conference (5)

Jamal Price	Football
Jhurell Pressley	Football
David Guthrie	Football
Cassie House	Volleyball
Hannah Johnson	Volleyball

All-Defensive Team (Conference Level) (1)

Antiesha Brown	Women's Basketball
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All-Region/District (14)

Charlotte Arter	Women's Cross Country
Calli Thackery	Women's Cross Country
Alice Wright	Women's Cross Country
Anna Burton	Women's Cross Country
Nicola Hood	Women's Cross Country
Ross Matheson	Men's Cross Country
Chantale Riddle	Volleyball
Chris Wehan	Men's Soccer, <i>First Team</i>
Mattie Gibbons	Men's Soccer, <i>Second Team</i>
James Rogers	Men's Soccer, <i>Second Team</i>
Ben McKendry	Men's Soccer, <i>Second Team</i>
Hugh Greenwood	Men's Basketball

Gavin Green	Men's Golf, <i>PING</i>
Carl Stajduhar	Baseball

National Players of the Week (1)

Chantale Riddle	Volleyball
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All-America (18)

Charlotte Arter	Women's Cross Country
Alice Wright	Women's Cross Country
Carlos Wiggins	Football, <i>Preseason</i>
Chantale Riddle	Volleyball, <i>Honorable Mention</i>
Adam Bitchell	Men's Indoor T&F, <i>3,000 Meter</i>
Allan Hamilton	Men's Indoor T&F, <i>Long Jump</i>
Sammy Silva	Women's Indoor T&F, <i>Mile</i>
Emilie Cedervärn	Skiing, <i>Freestyle</i>
Eva Sever Rus	Skiing, <i>Freestyle</i>
Mateja Robnik	Skiing, <i>Giant Slalom</i>
Emilie Cedervärn	Skiing, <i>Classical</i>
Aku Nikander	Skiing, <i>Classic</i>
Mateja Robnik	Skiing, <i>Slalom</i>
Gavin Green	Men's Golf, <i>First Team PING; All-Nicklaus</i>
Logan Pflibsen	Men's Outdoor T&F, <i>Pole Vault</i>
Peter Callahan	Men's Outdoor T&F, <i>1,500 Meter</i>
Calli Thackery	Women's Outdoor T&F, <i>5,000 Meter</i>
Alice Wright	Women's Outdoor T&F, <i>10,000 Meter</i>

NCAA Regional Champion (2)

Emilie Cedervärn	Nordic Classical
Emilie Cedervärn	Nordic Freestyle

National Coaches Association Team Academic Awards (7)

Men's Soccer
Women's Soccer
Men's Cross Country
Women's Cross Country
Swimming & Diving
Men's Golf
Women's Golf

National Finishes

Women's Cross Country	NCAAs	3rd
Men's Cross Country	NCAAs	11 th
Men's Indoor Track and Field	NCAAs	31st
Women's Indoor Track and Field	NCAAs	46th
Skiing	NCAAs	5 th
Women's Basketball	WBI	T-5 th
Men's Outdoor Track & Field	NCAAs	36th
Women's Outdoor Track & Field	NCAAs	T-48 th

Men's Golf	NCAAs	49 th (Regionals-9 th)
Men's Tennis	NCAAs	T-33 rd
Women's Tennis	NCAAs	T-33 rd

III. CURRENT PROJECTS

Athletics recently completed its 2015-2020 Strategic Plan (included as Appendix A). There are many on-going current project including upgrading facilities including improving wireless network capabilities in our venues.

Athletics is continuing ambitious scheduling for its teams, including the addition of the University of Notre Dame in football in 2019. Work is ongoing on sound upgrades for Branch Field, some of which were completed in time for the 2015 football season.

IV. FUTURE PLANS

The main project will be a permanent Olympic Sports Athletic Performance facility where the current temporary facility is currently housed. We are also in the planning and site survey stages for a permanent home for our newest sport, Beach Volleyball (formerly known as Sand Volleyball).

V. APPENDICES

Appendix A: Athletic Department 2015-2020 Strategic Plan



Appendix A: 2015-2020 Strategic Plan



UNIVERSITY OF NEW MEXICO

DEVELOPING LOBOS FOR LIFE
A STRATEGIC PLAN • 2015-2020

UNIVERSITY OF NEW MEXICO



DEVELOPING LOBOS FOR LIFE *STRATEGIC PLAN FOR ATHLETICS*

STATEMENT OF PURPOSE

The University of New Mexico Department of Athletics is at the end of a planning cycle that has seen tremendous growth and positive change in the department and within its sports programs. The accomplishments of the 2009-2014 plan are defined in the Appendix I of this document. The purpose of the accompanying Strategic Plan is to build upon the success of the past and create a vision for the future of Lobo Athletics.

The accompanying plan will serve as a guide the University of New Mexico Department of Athletics as it sets new priorities, identifies and allocates resources, and serves to create a unifying direction for coaches, student-athletes, and athletics' staff, the University community, including faculty, administration, alumni and supporters. As the University of New Mexico asserts itself as a regional University and the Flagship University of the state of New Mexico, this plan seeks to:

- Clearly define the Department of Athletics' Mission, Vision, and Core Values;
- Ensure alignment with the University and the region's Vision and Core Values;
- Identify specific goals and action steps that will enable New Mexico Athletics to achieve its commitment to the University, student-athletes, alumni and supporters;

- Provide a management, planning and assessment tool for the President and the Director of Athletics;
- Enable and foster a collaborative positive working environment for students, faculty, coaches, and staff through common goals initiatives.

The **DEVELOPING LOBOS FOR LIFE** Strategic Plan establishes goals and priorities for Athletics and clearly defines the Department's purpose and mission—"Developing Lobos for Life." The Plan is intended to serve as a clear and collaborative guide for the operation of the Athletics program through at least 2020, although some initiatives may carry over beyond that date. The Plan is intended to be a fluid document that will adapt as the ever-changing landscape of college athletics demands. With ever increasing demands upon athletics, this plan encourages growth, expansion and a clear plan for regional growth. The plan encourages broad-based oversight and University-wide participation in the future of Lobo Athletics.

The core of a successful implementation of the plan will rest upon the University community's ongoing commitment to building a quality Division I intercollegiate athletic experience for a diverse population of student-athletes. The effectiveness of the Plan will be further reliant upon the University and the region to assume a shared commitment to the Athletics program, its contributions to the state and its shared commitment to the well-being of the student-athletes that has characterized the planning process.

EXECUTIVE SUMMARY

In late May 2014, the New Mexico Department of Athletics was nearing the end of the five-year plan that had guided their program since the plan's implementation in 2009. The Athletics Department, led by Vice President for Athletics Paul Krebs, initiated a process to develop a strategic plan that would serve the Department into the year 2020 and beyond. Collegiate Sports Associates (CSA) was engaged by Krebs to assist in the planning process.

With the objective of the plan being to create a plan that could lead the Department through an ever-changing landscape of intercollegiate athletics, the Vice President for Athletics appointed a Strategic Planning Steering Committee of eighteen (18) members from a wide range of constituent groups to oversee the strategic planning process. The Strategic Plan that was created will serve as a guide and unifying document of reference for coaches, student-athletes, athletics department staff, the University community, alumni, stakeholders throughout the region, and supporters of Lobo Athletics.

A broad based Mission, Vision, and Core Values (M/V/CV) Work Group supported the Steering Committee. The Committee's charge to the M/V/CV Work Groups, composed of eleven (11) members was to review the current Athletics' Mission and Vision Statements as well the established Core Values for the Athletics Program and make any revisions that would provide a foundation for the overall strategic planning process. The resulting Mission, Vision, and Core Values statements were shared with constituent groups and approved by the Vice President for Athletics and the Strategic Plan Steering Committee.

After thoroughly reviewing the results of a Landscape Analysis of the current status of the Athletic Program, the M/V/CV Work Group developed a draft of Goals and Objectives for the Athletics Program. These Goals and Objectives became the starting point for other Work Groups charged with fully developing the various components of the Strategic Plan. Work Groups were appointed to further refine the Goals and Objectives in six priority areas. Ultimately each of the six Work Groups identified the strategies needed to reach the goals set for their area of concentration as well as the action steps required to implement the strategies, assigned accountability for each action step and time frames for completion, anticipated resource requirements, and identified key metrics for measuring progress.

Todd Turner, President of Collegiate Sports Associates and the lead consultant for the Strategic Planning process, initiated the planning project with a presentation on the future of intercollegiate athletics to the entire Athletics Department on May 18, 2014. A Landscape Analysis of the status of the Department and its aspirations was conducted in June. The analysis included an on-line survey of the observations and opinions of staff, faculty, supporters, students, student-athletes, head coaches and athletic staff. The survey yielded 211 responses and the results of the survey were shared with the M/V/CV Work Group, as were the

observations of Vice President for Athletics, Paul Krebs. The assessment also included personal interviews by consultants Todd Turner, and CSA VP Pam Overton with a member of the Board of Regents, distinguished donors, student-athletes, athletics staff and University administration, including the President of the University, Dr. Robert G. Frank.

The Landscape analysis indicated that the Department is healthy and moving forward in a cohesive mission to support student-athlete development, excel in athletic competition, and to do so with integrity. The analysis also revealed the need to tell this story effectively within the University and the region. While the University and the Athletics Department have always valued doing more with less, it is increasingly more difficult to achieve excellence within the resources available. The survey indicated it will be necessary to make a renewed effort to identify new sources of revenue and additional regional support for the athletics program. The analysis indicated great pride in the accomplishments of student-athletes in the classroom and the staff and facilities that have been put in place to support academic achievement. The department rightfully takes pride in the fact that the current debt for athletic facilities is well below other comparable programs, but maintenance and upgrades continue to be of concern. Many of those surveyed and the VP for Athletics indicated a need for better communication. As athletic programs develop there is a tendency to develop operational silos that would benefit from better communication and collaborative efforts. Responses indicated that morale within the Department would improve if there were better avenues of communication within the department. As the quest for competitive excellence becomes more and more complex, there is a need to establish clear goals for individual sports programs and the expectations within the changing landscape of college sports. As these goals are set, the Department would benefit from some reward system and acknowledgement of those who go above and beyond to be part of the team.

These analyses were presented to the Strategic Planning Steering Committee on July 23, 2014. The results served as a basis for the work of the M/V/CV Group that initially developed the goals and objectives that were the basis of the Strategic Plan. This M/V/CV Work Group met for a one-day retreat to thoroughly review the Landscape Analysis and develop the framework of what was to become the framework for the Strategic Plan.

After the M/C/CV Work Group completed their work, six additional Work Groups were appointed by the Director of Athletics to complete the work on the six priority areas identified by M/V/CV Work Group. The six Work Groups were made up of individuals with a wide range of expertise from throughout the athletic department and the University. The Work Groups were charged with identifying strategies in six goal categories. The Groups developed major goals spread among the six priority areas. The priority areas and their goal statements include:

1. **STUDENT-ATHLETE WELL-BEING** – Lobo Athletics will prepare Student-athletes to be Lobos for Life.
2. **COMPETITIVENESS** - All Lobo teams will be positioned to compete regularly for Conference Championships and advance in postseason play.

3. **COMMUNICATIONS** - Lobo Athletics will effectively tell our story to all our internal and external constituents.
4. **RESOURCES** - Lobo Athletics will generate resources to support a 3.6 % annual growth in budgeted revenue, assuming a 3% annual growth in budgeted expenditures, which will lead to a one million dollar reserve fund.
5. **GOVERNANCE** – Lobo Athletics is a source of pride for all of New Mexico because we compete successfully, operate with integrity and represent the entire state with dignity.
6. **CULTURE** - Lobo Athletics Developing Lobos for Life is all inclusive—(staff, coaches, fans).

The Work Groups developed nineteen (19) strategies to be implemented in order to achieve the strategic goals and objectives. Additionally they identified ninety-four (94) action steps that would be needed to fully activate the nineteen strategies to achieve the goals of the Plan. In addition to identifying strategies and action steps, the Work Groups developed a tracking grid that assigned accountability, estimated resource requirements, identified key measurements, and set time frames for the completion of each action step and strategic initiative. They also put together a detailed master time-line for tracking progress on the implementation of the plan.

During the months of September and October, Mr. Krebs was kept abreast of the progress of these working groups and in late October the groups met to share their work with each other and presented a draft to Mr. Krebs. On November 12, 2014 a meeting was held to share the draft with the Department of Athletics staff and the Strategic Plan Steering Committee for their endorsement and ultimate adoption. The resulting Strategic Plan, which serves as a management tool for the Department of Athletics and as a guide for the University is set for adoption and immediate implementation.

THE STRATEGIC PLANNING PROCESS

The preparation to begin a Strategic Plan began in May 2014. The University of New Mexico Vice President for Athletics, Paul Krebs engaged Collegiate Sports Associates for Athletics, to assist in the planning process.

The initial step in the CSA planning process for the Strategic Plan was to provide context for developing the plan and clearly define expected outcomes. Paul Krebs, and CSA Consultant, Todd Turner, presented an overview of the planning process and desired outcomes to the Athletics Department on June 18. (Exhibit A)

LANDSCAPE ANALYSIS

In August, 2014, Collegiate Sports Associates conducted personal interviews and collected data via an electronic survey as a part of the landscape analysis (Exhibit B)

As a part of the analysis Todd Turner, President of Collegiate Sports Associates/Lead Consultant, and Pam Overton VP of Collegiate Sports Associates, visited campus for two days. They met various stakeholders including senior administrators in the Athletics Department, University administrators, and faculty. They also met with key supporters Rick Galles, Jerry Geist, Steve Chavez and Adam Harrington as well as Regent Jamie Koch.

An electronic survey designed to gather observations and opinions of key stakeholders was administered to all athletic staff, SAAC Board (student-athletes), Athletic Council, Lobo Club Board and the Steering Committee for the Strategic Plan. In addition to this analysis were the observations of Vice President for Athletics Paul Krebs (Exhibit C).

The interviews and survey findings revealed many of the unique features of the University of New Mexico Athletics. Among them are:

1. **There is a sense of pride in being a visible and successful part of the Flagship University of the state of New Mexico and the region and state leadership is very supportive.**

This is enviable and something to be nurtured and directed to help the athletics program grow its base of support. Many responses indicated that efforts should be stepped up and that the entire region will be enhanced through the visibility and success of a competitive athletics program.

2. There is an unwavering commitment to the academic success and the well-being of the student-athlete.

The Center for Student-Athlete Success represents a significant commitment to the mission of the University and the Department of Athletics. There has been a commitment to staff (Clinical Psychologist and a Certified Sports Nutritionist have been added to staff) and other resources to support the academic mission. Those interviewed take great pride in the success of student-athletes in the classroom.

3. Championship performances have been an expectation even in a culture of doing “more with less.”

UNM has fostered the development of championship performances and has won Conference championships in eight sports in each of the past two years. As these Championship performances have been achieved, expectations have risen and all teams are striving for Top 3 finishes in the Mountain West Conference.

4. There is a strong culture of integrity and compliance.

UNM Athletics has a reputation of integrity and commitment to rules, regulations and University guidelines. All those interviewed or responded indicate this culture must be nurtured in order for the program to be successful.

5. There is a commitment to cultivating and rewarding coaching talent.

UNM remains competitive in coaching salaries and in identifying and attracting coaching talent.

There also appeared to be a consistent acknowledgement of trends that challenge the effective operation of the Athletic Department:

1. Communication within the Department needs to be improved.

Staff feels underappreciated and feels that better communication would lead to better morale within the department. While most of the staff supports the administration, they are looking for a more inclusive administrative process and one that rewards success.

2. Silos have started to re-emerge and the Department needs a renewed commitment to teamwork.

For the Department to operate most effectively, the administration needs to address the issues of transparency and teamwork. A more supportive culture needs to be established in recruiting, identifying resources, and getting out the message of Lobo

Athletics. Things such as coaches and staff attending each other's events, socializing across sports, and developing a Department-wide commitment to recruiting in all sports should improve teamwork.

3. National governance issues are affecting all athletics programs and UNM needs a clearly articulated response plan.

As the landscape continues to change, the University, the Department of Athletics, the Board of Regents, and the support base must be aligned in their plan to keep UNM viable as a part of the Conference and the national competitive landscape.

4. Revenue generation is essential for continued success.

While this is not new to the Department of Athletics, it is certainly growing in its sense of urgency. For the program to continue to perform and meet the expectations of its constituencies new revenue sources must be identified and support must continue to grow.

5. There is a need to "tell our story" locally, regionally, nationally, and throughout the expanding international recruiting base.

As the Department recommits to a solid foundation of teamwork, coaches and staff must unite in their efforts to get out the message of Lobo Athletics. This kind of teamwork can pay tremendous dividends. The Department should embrace all available technology and media.

There is a great anticipation that a universally supported Strategic Plan for Athletics supported by a well-articulated Vision for Lobo Athletics will make a difference in the collaborative success of the academic and athletic mission.

THE VICE PRESIDENT FOR ATHLETICS PERSPECTIVE

Paul Krebs is a veteran athletics administrator who has been serving as Director of Athletics since June 1, 2006. In spring of 2007 he was named Vice President for Athletics. Under Krebs, New Mexico programs have been competing for conference championships and national recognition in every sport. The program has continually ranked among the top non-BCS institutions in the Learfield Sports Directors' Cup. His observations and assessment provided important context to the development of the strategic plan and included the following:

What is working well

1. Competitiveness – doing more with less.
2. Academic Center – student-athlete success.
3. Paying and recognizing talent – coaches.
4. Campus and State leadership is very supportive.
5. Improvement to facilities – comprehensive, all with no debt (private & state support).

Challenges (needed improvements)

1. Communication, internally especially.
2. Football & developing support.
3. Silos have started to re-emerge – need more teamwork.
4. Operating budgets.
5. Appreciation for what has been accomplished – celebrating success (championships won, s-a achievements, facility improvements, etc.).
6. Need an “identity” that speaks to who we are and what makes us unique and a high quality place to work and compete.
7. National governance issues – how will they impact UNM, how will we identify and implement our responses.
8. Fundraising and resource development, especially for operating budgets and major giving.
9. Changes in representation on the UNM Board of Regents.
10. Explaining funding models to campus colleagues.

Opportunities

1. We should compete for the conference championship in Football.
2. Build fan support.
3. New Regents.
4. Relationship with state government.

Goals & Priorities

1. NCAA Governance changes: How do we stay relevant nationally as a school and conference?

2. Facilities – continue to improve and maintain (baseball, track & field, skiing, wt. room for Olympic programs, football stadium renovation, branding and esthetics/identity packages).
3. Improve communication – tell our story, create a sense of team, use of social media, utilize technology effectively.
4. Student-athlete well-being – holistic support expanded to include postgraduate opportunities.
5. Improve Student-athlete participation in decision-making.
6. Revenue generation.
7. Develop a long-range fiscal strategy with projections.
8. Celebrate successes and tell our story.

STRATEGIC PLANNING STEERING COMMITTEE & STRATEGIC PLANNING WORK GROUP

To oversee the planning process, a Strategic Planning Steering Committee (Exhibit D) was appointed by the Vice President for Athletics. The Strategic Planning Steering Committee members were selected to ensure broad based participation and included senior University officials, members of the faculty, senior athletics administrators, Lobo Club, Alumni Association, Letterman’s Association, SAAC, coaches, and the community. The committee was supported by a Mission/Vision/Core Values (M/V/CV) work group comprised of ten (10) individuals with significant experience in University positions, both internal and external to the Athletics Department. (Exhibit E) The (M/V/CV) group met on July 23 for a planning retreat to initiate the formal planning process.

Mission, Vision, and Core Values Statements

The Mission/Vision/Core Values Work Group spent a great deal of time reviewing and discussing the information gathered in the landscape analysis. The VP for Athletics, Paul Krebs, also led a discussion of his assessment and views on where the Department’s challenges and opportunities.

The Work Group reviewed the University’s Mission, Vision, and Values (Exhibit F) as a foundational document for their planning. The Work Group also reviewed the recently adopted Mission, Vision, and Core Values of the Athletics program and discussed the relevance to the current position of UNM and the changing landscape in Division I athletics (Exhibit G).

The groups spent considerable time with the foundational aspect of the Athletics Department’s Mission. After a lengthy review, it was decided that while the currently stated Mission reflected a core commitment, it did not rise to the level of a simple statement that left no uncertainty as to the Mission the Department wanted all constituents to embrace. After considerable discussion, the M/V/CV Work Group changed the Mission Statement to

“Developing Lobos for Life.” The Work Group felt that statement reflected their commitment to student-athletes, alumni, university programs and athletic success.

After thoroughly reviewing the University of New Mexico’s stated Mission, Vision, and core Values and discussing how the Department of Athletics fit within that umbrella, the Mission Vision and Values Work Group collectively endorsed the following statements (Exhibit H):



UNIVERSITY OF NEW MEXICO • DEPARTMENT OF ATHLETICS

MISSION

DEVELOPING LOBOS FOR LIFE!

VISION STATEMENT

The University of New Mexico athletics aspires to be the premier athletic program in our Conference and recognized as a national leader in intercollegiate athletics with an international reputation for excellence.

CORE VALUES

Student Athlete Experience - We provide an environment that promotes personal, academic, athletic, and social development. We prepare Lobos for Life!

Integrity - We are honest, respectful, and accountable.

Excellence - We maximize our efforts and talents to ensure success of the Lobos.

Respect - We value the importance of diversity, fairness, goodwill and sportsmanship.

Lobo Pride - We support an atmosphere that embraces school spirit, honors tradition, and develops Lobos for Life!

PRIORITIES, GOALS AND STRATEGIES

After completing the Mission, Vision, and Values Statements, the M/V/CV Work Group began identifying specific priorities for the Department. Six Priority areas were identified for the Department:

1. Student-athlete Well-being.
2. Competitiveness.
3. Communications.
4. Resources.
5. Governance.
6. Culture.

With recommendations from Kurt Esser, Departmental Coordinator of the Strategic Planning Process, and other appropriate staff, the VP for Athletics appointed six additional Work Groups (Exhibit H) to assist the M/V/CV Work Group in setting measurable goals in each of the priority areas. Ultimately, relying on the combined expertise and efforts of all groups the following goal statements were developed:

1. STUDENT-ATHLETE WELL-BEING - Prepare Student-athletes to be Lobos for Life.
 - a. Student-athletes achieve their full potential as students.
 - b. Student-athletes train and compete to reach their full potential as athletes in a safe, non-threatening environment that prioritizes their physical and emotional health.
 - c. Student-athletes are well prepared to pursue a career of their choice.
2. COMPETITIVENESS - All of our teams will be positioned to compete regularly for Conference Championships and advance in postseason play
 - a. Our teams will finish at the top of the Mountain West Conference.
 - b. We will recruit student-athletes who are champions.
 - c. Our coaches will be excellent teachers, respected national for their expertise, dedication, and competitive success.
 - d. We will provide championship facilities at the top of the Mountain West Conference.

3. COMMUNICATIONS - We will effectively tell our story to all our internal and external constituents.
 - a. The UNM “Brand” will be widely known.
 - b. We will be fully engaged in the life of our State and local community.
 - c. We will use all available technology to deliver our message.
 - d. We will enhance communication with student-athletes and staff.

4. RESOURCES - We will generate resources to support a 3.6 % annual growth in budgeted revenue, assuming a 3% annual growth in budgeted expenditures, which will lead to a one million dollar reserve fund.

5. GOVERNANCE - UNM is a source of pride for all of New Mexico because we compete successfully, operate with integrity and represent the entire state with dignity.
 - a. We will operate with integrity and ethical behavior and comply with all rules, regulations and laws that are applicable to the Athletic Department.
 - b. We are positioned to proactively address changes in the national landscape of NCAA Division I athletics.
 - c. We are committed to engaging University leadership, legislators, and community leaders on the mission of the Athletics Department and the University as a whole.

7. CULTURE - Developing Lobos for Life includes all of us—(staff, coaches, fans)
 - a. The entire athletics staff will be fully engaged in the Athletic Department, including the daily operation and the implementation of the Strategic Plan.
 - b. We will recognize and celebrate our collective and individual accomplishments.
 - c. We will promote a spirit of good sportsmanship, great customer service and community.
 - d. We will seek opportunities for professional growth for all staff and coaches.
 - e. We will study office and facility logistics as an element in a great department culture.

Each of the six Work Groups also developed a series of strategies and action steps that when pursued, would enable the successful attainment of the Strategic Plan.

ACTION STEP MATRIX

The Work Groups developed a comprehensive list of action steps that would be undertaken to implement the strategies and achieve the goals identified in the plan. The Matrix also defined accountability, key measurements, resource requirements, and time frames for completion that were developed and put into a management matrix document for use in tracking progress on the plan. (Exhibits I – N)

THE FINAL REPORT

The Department of Athletics Strategic Plan for 2015-2020, DEVELOPING LOBOS FOR LIFE, was completed and submitted to the VP for Athletics and to the President for adoption in December 2014.

EPILOGUE

The true value of Strategic Planning is not in the document that is created but in the planning process that brought people together to review, assess, examine, visualize, explore and to contribute and create. The process used to give life to this tremendously important document was intentionally inclusive to encourage broad-based participation that will ultimately lead to buy-in and ownership by the University, its many constituents, stakeholders and supporters. It is intended to be a document that encourages continuous improvement, not only in the content of the Plan, but also in continued collaboration and support for the successful operation of the Department.

Until changed through a similar collaborative and inclusive process, the Mission, Vision, and Core Values should serve as constant reminders of the significant value of the Athletics program to the distinct culture that characterizes the University of New Mexico. The values should be celebrated widely and serve as a constant reminder of the University of New Mexico's commitment to the student-athlete and the success of the entire program.

As conditions change, so too may the goals, strategies, and action steps in place to achieve change. Thus, this Strategic Plan should always be viewed as a dynamic and ever-changing document that will guide the University of New Mexico for years to come as it Prepares Lobos for Life!

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY						
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS	
IV.1.c.i. Close Naming Rights Gift for The Pit	VP/Athletics, Associate AD/Development	Staff time, cost of re-branding arena	Average of \$500,000 per year to the Pit Renovation Fund	COMPLETED	PK	
I.2.i.i Develop and facilitate the Wellness & Intervention Team (WIT) for the purpose of identifying student-athletes in distress and engaging early intervention and support.	Clinical Psychologist	Staff / Time	Annual psych services analysis	2014 - Summer (On-Building) - COMPLETED	VV/HV	
VI.2.b.ii Lead all staff with a recognition of fellow staff (thank yous!)	C.O.O./Culture Committee	First 5 min of All-Staff		Fall 2014 (On-building) - COMPLETED	KME/TC	
V.3.c.i. Provide updates to University President and Regents on a regular basis.	Vice President for Athletics	HR: staff time	Updates provided on a regular basis.	On-Building - COMPLETED	PK	
V.3.c.ii. Provide updates to elected officials as needed.	Vice President for Athletics	HR: staff time	Updates provided on an as-needed basis.	2015 - Spring (On-Building) - COMPLETED	PK	
I.1.a.i Conduct of a survey of SAAC on how to improve their academic experience.	Life Skills Coordinator	Survey instrument & Staff Time	Develop and have students complete the survey. Review the data and develop strategies	2015 - Spring		
I.1.b.i Evaluate UNM Athletics Academic Performance Metrics	VP for Athletics & Assoc. A.D for Student Dev.	Staff Time	Performance Metrics	2015 - Spring		
I.1.c.iii Develop in-house new advisor training and continuing education programming	Life Skills Coordinator & Assoc. A.D. for Student Dev.	Staff Time	Plan developed Plan implemented	2015 - Spring		

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY						
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS	
I.1.d.i. Develop student major selection process and educational opportunities	Assoc. A.D. Student Dev. & Advisement Staff	Staff Time Campus Collaboration	Educational Programs Implemented Major Selection Process	2015 - Spring		
I.3.a.i. Create a survey to send out to current & former student-athletes	Athletic Career Specialist & Life Skills Coordinator	Staff Time	Survey bank of questions	2015 - Spring		
II.2 a.i. Develop a "profile" for successful Student-Athletes (Academics, social, competitive)	Head Coaches, Asst. Coaches, Sport Supervisor Assoc. AD Student Development	Staff Time	Profile for each sport is complete	2015 - Spring		
II.4.a.ii Create a list of facilities that have deferred maintenance. Prioritize needs and present a budget to address needs.	Assoc. AD Facilities	Staff Time / TBD	Annual review	2015 - Spring		
II.4.a.iv. Create a set of expectations and protocols for maintaining excellent facilities.	Assoc. AD Facilities	Staff Time	Protocols presented to Athletic Director with proposed budget requirements	2015 - Spring		
III.3.a.ii. Cost analysis of current web provider for GoLobos.com. Includes apps for both apple and android.	Assistant Director/ Communications	Staff time/Amount of \$\$	Measure current costs and needs assessment to update.	2015 - Spring		
VI.1.d. Create templates for staff/committee make up, including attention to demographic makeup	H.R./Leadership Team approval	Time	Must be used and be current	2015 - Spring		

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY						
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS	
VI.1.e. Develop a list of staff interested in working on various committees	H.R./AD Admin.	Time, organization	Must be used and be current	2015 - Spring		
VI.2.b. Review and track ticket opportunities (Balloon Fiesta, etc.)	Fun Committee/AD Admin.	Time	Give priority to non-LT & non-HC staff. Better communication methods	2015 - Spring		
VI.3.a.iii. Enhance staff involvement in community service projects with S-A	Community Service/Sr. Assoc. AD Ext.	Time, organization	Participation (Lobo Day of Service)	2015 - Spring		
VI.4.a.i. Launch a "PD" committee to plan create/review ideas for admin and staff	Leadership Team	Annual budget for education	Participation	2015 - Spring		
VI.4.a.iv. Encourage Senior Staff and Head Coaches to develop relationships/mentorships with new HC and Asst Coaches	Leadership Team/Head Coaches	Time, organization	Participation/retention/Asst. Coaches advancement	2015 - Spring		
II.1.a.i. Message the expectation of competitive success.	VP for Athletics & Sport Supervisors	Staff Time	Evidenced by including competitive success notes in staff communication and meetings and chance encounters.	2015 - Spring (On-going)		
II.2.a.iv. Fully develop the potential of student athletes, by gaining testimonials from former Student Athletes and displaying them prominently.	Alumni Lettermen's Association, Associate AD Student Development	Staff time, potential increase in Lettermen's Budget	Testimonials collected and shared.	2015 - Spring (On-going)		

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY						
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS	
VI.1.a. Re-Launch (AND re-name) the "Fun Committee" to plan social activities for staff	Sr. Assoc. for Ext.	Time (new events may require a budget)	Committee Re-Launched Plan Introduced to Staff	2015 - Spring (On-building)		
VI.1.b. Ask members of Leadership team to "kick off" social events with a message, update or call for input	Leadership Team	Time	Participation & Feedback	2015 - Spring (On-building)		
VI.1.f. Create key messages for all staff to have on Department Goals and priorities.	Communications	Timely distribution	Annual and situational (use hazing incident template) messages	2015 - Spring (On-building)		
VI.5.a.i. Identify needs for work stations, furniture, branding elements	Culture Committee/Facility Assoc. AD/C.O.O.	Time, organization, office space?	Participation	2015 - Spring (On-building)		
iii.4.a.i. Athletic Director will meet quarterly with the SAAC	VP for Athletics	Staff Time	Communication strategies developed and created	2015 - Spring (On-building)		
III.4.a.ii. SAAC members will continue to be included in staff meetings and leadership team meetings.	Associate AD/Student Development	Staff Time	Communication strategies developed and created	2015 - Spring (On-building)		
iii.4.a.iii Staff will seek input from student-athletes on great inclusion in departmental policy decisions.	Associate AD/Student Development	Staff Time	Survey & solicit feedback on department decisions	2015 - Spring (On-building)		

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY						
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS	
IV.1.a.i. Increase visibility of Football Head Coach & Coaching Staff through community appearances/speaking engagements per year, starting in 2014-15	Assistant AD for Marketing, Director of Football Operations	Staff & Coaches' time	Monitor coaches' appearances and report annually	2015 - Spring (On-building)		
IV.1.a.v. Explore spring events & other fan oriented events such as autograph sessions	Assistant AD/Marketing, Director of Football Operations	Staff, Team & Coaches' time	3-5 fan engagement events per sport	2015 - Spring (On-building)		
IV.1.c.ii. Increase Annual Major Gifts for The Pit Renovation Fund	Associate AD/Development, Assistant AD/Major Gifts	Staff Time	Minimum of \$200,000 per year to the Pit Renovation Fund	2015 - Spring (On-building)		
IV.1.c.iii. Improve Collection Rates for Scholarship Fund and Premium Seats	Associate AD/Development	Staff time, cost of mailings	Increase in collection rates	2015 - Spring (On-building)		
V.1.a.i. Provide education throughout the year to university staff and student-athletes regarding rules and regulations.	Asst. Athletics Director for Compliance	HR: staff time; potential printing costs	Ensure that at least one rules education session was available to every staff member and student-athlete during the academic year.	2015 - Spring (On-building)		
V.1.a.ii. Provide education to donors and community members (i.e. high school students and personnel, etc.) regarding rules and regulations applicable to them.	Asst. Athletics Director for Compliance	HR: staff time; potential printing costs	Meet with Lobo Club Board of Directors at least once each academic year. Outreach to community members through in-person meetings or distribution of educational materials/information at least	2015 - Spring (On-building)		

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY						
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS	
V.2.a.ii. Anyone active on a committee must provide updates to the Athletic Department regarding national news/trends on an annual basis.	Staff who serve on various committees	HR: staff time; potential cost to travel to meetings	Address Athletic Dept. staff at least once per academic year at an All-Staff Meeting regarding the work of their committee and any national news or trends.	2015 - Spring (On-building)		
V.2.b.i. Develop policies for coaches and staff to attend their National Association Meetings. Reward those who take leadership positions in their associations.	Director of Human Resources and Leadership Team	HR: staff time; cost for membership fees and potential travel costs	Attendance rate reported to Leadership Team on annual basis for staff in each area. This should include who in each area holds leadership positions in their associations.	2015 - Spring (On-building)		
V.2.b.ii. Coaches and staff are required to provide an update on their association status.	Coaches and staff who have associations that they could choose to join	HR: staff time	Reports collected on an annual basis	2015 - Spring (On-building)		
V.3.a.i. Invite staff and faculty leaders to an athletic event with legislator/community leaders to promote open communication.	Assoc. AD for Student Development (with input from Leadership Team about who should be invited)	HR: staff time	Review program annually to ensure that invitations have been extended to staff and faculty leaders.	2015 - Spring (On-building)		
I.1.d.iii Educate students on the proper use of Lobo Trax (degree audits and degree plans)	LCSAS Advisement Staff	Staff Time	Student Advisement Survey	2015 - Spring (On-building)		
I.1.d.iv Have students review and follow their degree plans for their respective majors upon the acceptance into a major	LCSAS Advisement Staff	Staff Time	Student Degree Plans	2015 - Spring (On-building)		

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY						
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS	
I.3.a.ii Work with athletic Alumni Letterman's Association to gather contact info/connect with former students	Asst. A.D. for Student Dev. & Director of Alumni Lettermen's Association	Staff Time	Meetings & follow-up	2015 - Spring (On-building)		
I.1.a.ii Enhance summer bridge program for Freshmen student-athletes	Learning Specialist & FAR	Staff Time & Collaboration with Campus Partners	Plan Dev., Plan implementation and Evaluation	2015 - Summer		
I.1.b.ii Develop new Academic Performance Metric Goals	VP for Athletics & Assoc. A.D. Student Dev.	Staff Time	Performance Metrics Goals	2015 - Summer		
I.2.a.i Review physician hours in the clinic to ensure they are meeting the needs of our students.	Head Athletic Trainer & Head Team Physician	Staff time	Schedule Change	2015 - Summer		
I.2.a.ii Review medical personnel in the training room and need for additional ATC staff.	Head Athletic Trainer & Head Team Physician	Additional Staff	Staff hired	2015 - Summer		
I.2.a.iv Schedule monthly in-service with physicians and other healthcare providers	Head Athletic Trainer & Head Team Physician	Staff Time \$500	Information dissemination	2015 - Summer		
I.2.b.ii Develop a facility improvement plan in coordination with the OPC project	Head Athletic Trainer & Athletic Trainer	Staff time	Improvement plan	2015 - Summer		

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY					
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS
I.2.b.iii Develop a capital equipment plan and proposal.	Head Athletic Trainer	Staff Time	Capital equipment plan and proposal	2015 - Summer	
I.2.d.iii Evaluate staffing needs	Clinical Psychologist	Staff Time	Evaluation of Staffing Needs.	2015 - Summer	
I.2.e.i Execute a needs analysis.	Athletic COO & Nutritionist	Staff/Time	needs Analysis	2015 - Summer	
I.3.a.iii Survey JR/SR student-athletes and recent graduates (within 3 yrs.) to identify needs	Asst. A.D. for Student Dev. & Life Skills Coordinator	Staff Time	Listserv Email	2015 - Summer	
I.3.a.iv. Analyze feedback to guide next steps	Asst. A.D. for Student Dev. , Life Skills Coordinator & Athletic Career Specialist	Staff Time	Final Report, Meetings & follow-up	2015 - Summer	
II.1.a.ii. Develop a bonus incentive program that rewards competitive success.	VP for Athletics & Sport Supervisors	Costs TBD	Plan to recognize success is created and implemented	2015 - Summer	
III.3.a.ii Review coaches compensation packages to remain competitive within conference.	VP Athletics, Chief Operating Officer, Sports Supervisors	Costs TBD	Based on last 5 years compensation increases, moving expenses, Head Coaches salary in top 3 of MW	2015 - Summer	
IV.1.b.i. Capitalize on all licensing opportunities, including international licensing	Sr Assoc AD/Marketing	Staff time & travel costs	Increase in international licensing revenue	2015 - Summer	

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY						
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS	
IV.1.d.ii. Maximize Contract Terms for Special Events by analyzing facility rental fees, concessions/parking/merchandise agreements, etc.	C.O.O.	Staff Time	Increase special event revenue at The Pit and University Stadium	2015 - Summer		
VI.2.c. Establish criteria and process for nominating individuals for recognition (within athletics, campus wide and/or nationally)	Community Service/H.R.	Time to review opportunities and write nominations	Diverse participation	2015 - Summer		
VI.3.a.i. Provide education on good sportsmanship. Setting a great example for our Coaches, S-A and fans	Sport Coordinators	Time, organization	MW measures	2015 - Summer		
VI.3.a.ii. Educate staff on good ways to resolve conflict, provide constructive feedback, etc.	H.R./Leadership Team	Time in "open forums"	Staff Feedback	2015 - Summer		
VI.3.a.iii. Enhance education on diversity, equity and inclusion	Community Service/Sr. Assoc. AD Ext.	Time, organization	Participation (Lobo Day of Service)	2015 - Summer		
III.3.b.iii Create streamlined communications plan to keep up with current trends/technologies	Senior Associate AD	Staff time/Amount of \$\$	Strategies developed and created.	2015 - Summer		

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY						
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS	
IV.1.a.iv. Explore the possibility of a fan referral & rewards program	Assistant AD/Marketing	Investment in scanning software infrastructure ~\$50K	Number of referrals and rewards program participants	2015 - Summer		
III.3.a.i. Develop a profile of success for Sport Supervisors, Head Coaches and VP for Athletics to use when a coaching opening comes at UNM.	VP Athletics, Head Coach, Sports Supervisor	Staff Time	Checklist created and shared with staff	2015 - Summer (On-going)		
III.2.c.i. Communicate important recruiting information (who is visiting, etc.) broadly within the athletics department.	Sport Supervisor, Coaches, Assistant AD Compliance	Staff Time	Point person is identified and messages are sent to all staff regarding recruiting updates.	2015 - Summer (On-going)		
II.2.a.ii. Fully educate coaches on strengths of UNM and New Mexico by updating Cosas Buenas, Lobos4Life and other recruiting materials	Sports Supervisors, Head Coaches	Staff Time	Education program developed and implemented	2015 - Summer (On-going)		
1.1.c.i Advisors participation in campus wide advisor institutes and Advise-L meetings	Assoc. A.D. Student Dev. & Asst. A.D. for Student Dev.	Staff Time	Assessment of staff participation	2015 - Summer (On-going)		
1.1.c.ii Advisors participation in state-wide, regional and national professional Dev. opportunities	Assoc. A.D. Student Dev. & Asst. A.D. for Student Dev.	Staff Time & \$4,000 annually	Assessment of staff participation	2015 - Summer (On-going)		
I.1.d.ii Develop and disseminate education and prevention on mental health and human performance topics in collaboration with Life Skills	Clinical Psychologist	Staff Time	Student-athlete surveys (SHAC, Exit Interviews & Athletics) Workshop evaluations	2015 - Summer (On-going)		

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY						
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS	
I.1.d.ii Student referrals to campus advisement resources	LCSAS Advisement Staff	Staff Time	Student Advisement Survey	2015 - Summer (On-going)		
II.1.b.ii Create a 5 year plan for each sport, with potential growth opportunities	Sports Supervisor, Coaches	Staff Time	Plans completed and given to Director of Athletics	2015 - Summer (On-going)		
III.1.a.i. Develop Policies on color usage, primary logo usage and Lobos font. Update & promote brand identity standards.	Senior Associate AD/ Marketing & Revenue & Equipment Operations Manager	Staff time	Policies created & implemented	2015 - Summer (On-going)		
III.1.a.ii Develop needs assessment on what teams using branding correctly. In addition, quantify costs to get all programs updated.	Equipment Operations Manager	Staff time	Needs assessment completed. Report shared with AD and staff	2015 - Summer (On-going)		
III.1.a.v Register marks internationally and align with University expansion (Mexico, China, Brazil, Australia, New Zealand, European Union and possibly Malaysia).	Senior Associate AD/ Marketing & Revenue & UNM Global Initiatives	Staff time/Amount of \$\$	Costs assessment of registered marks on an annual basis.	2015 - Summer (On-going)		
III.2.b.i Develop strategies to improve internal communication within athletics department including student-athlete's	Senior Associate AD & SAAC President	Staff Time	Strategies developed and created. Shared with AD and staff	2015 - Summer (On-going)		

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY					
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS
III.2.b.iii Create an internal committee to review and approve causes and initiatives supported by athletics units and student-athletes.	Senior Associate AD/Sprint Program Coordinator & Community Relations Coordinator/SAAC President	Staff Time	Develop team & survey department to determine causes and efforts to be supported. Shared with AD and staff	2015 - Summer (On-going)	
IV.1.a.ii. Increase ticket sales (season, single & group) by 3% per year through increased advertising and enhanced focus on group ticket sales	Sr Assoc AD/Marketing, IMG Learfield Ticket Solutions	Staff time, Increase marketing budget ~\$10K	Football & Women's Basketball ticket revenue	2015 - Summer (On-going)	
IV.1.a.iii. Enhance game day experience from arrival to departure by improving customer service, increasing interaction with student-athletes, and enhancing in-game/post-game entertainment	Assistant AD for Marketing, Assistant AD for Events	Staff time, increase game day staff budget	Customer satisfaction survey, renewal rates	2015 - Summer (On-going)	
V.1.c.i. On an annual basis, review and update the Athletic Dept.'s camp and clinic manual. Distribute to staff within the department who work with camps/clinics.	Asst. Athletics Director for Compliance	HR: staff time	Annual review and distribution.	2015 - Summer (On-going)	
I.1.b.iii Develop a new plan to improve institutions academic performance metrics	Assoc. A.D for Student Dev., LCSAS Staff & Campus Partners	Staff Time & Collaboration with Campus Partners	Academic Performance Plan Dev.	2015 - Fall	

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY						
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS	
I.1.c.i. Utilize completed study to develop a plan for an Olympic Performance Center.	Dir. of Athl. Perf., Asst. Dir. of Athl. Perf & Athletic COO	Staff / Time	Olympic Performance Center Plan	2015 - Fall		
I.1.c.ii Finalize the size, layout and essential equipment for the Olympic Performance Center.	Dir. of Athl. Perf., Asst. Dir. of Athl. Perf & Athletic COO & Assoc. AD of Facilities	Staff / Time	Layout and essential equipment established Project bid	2015 - Fall		
I.2.b.i Complete a facility audit to include comparison to other MW institutions	Head Athletic Trainer & Athletic Trainer	Staff Time	Facility Audit Comparison Report	2015 - Fall		
IV.1.b.vi. Review Athletics concessions opportunities by establishing a team to evaluate revenue potential from various concession options	VP/Athletics, Sr Assoc AD, University Purchasing	Staff time	Increase in concessions revenue	2015 - Fall		
V.1.b.i. Expand use of JumpForward database.	Asst. Athletics Director for Compliance	HR: staff time	Full implement the collection of practice log information to JumpForward.	2015 - Fall		
V.3.b.i. Create a committee to review the engagement of university leadership and community leaders on the mission of the Athletics Department.	Committee chair (appointed by Leadership Team) / Sr. Assoc. AD and SWA	HR: staff time	Creation of a committee.	2015 - Fall		
V.3.b.ii. Annual committee meeting with a report of progress and recommendations made to the VP of Athletics.	Committee chair (appointed by Leadership Team)	HR: staff time	Annual meeting and report.	2015 - Fall		

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY					
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS
VI.1.c. Develop an "open house" forum. Once a semester have lunch and an opportunity to ask questions	H.R./Culture Committee	Topics, Guest speakers, lunch are all costs	Participation & Feedback	2015 - Fall	
VI.4.a.ii. Launch an Assistant Coaches professional development forum	Sport Coordinators/Compliance	Time, organization	Success of Asst. moving into HC positions	2015 - Fall	
VI.4.v. Educate all staff on "Lobos for Life"	Leadership Team/Head Coaches	Time, organization, cost of new posters, banners	Staff can communicate the mission of "We Develop Lobos for Life"	2015 - Fall	
II.1.b.i Benchmark assets and resources against conference teams	Sports Supervisors	Staff Time	Benchmarked data is provided to Athletic Director	2015 - Fall	
II.2.c.ii. Develop and implement a plan to ensure that all staff understand their role in recruiting by developing a "one sheet" for all staff on recruiting tips	Sr. Associate AD, Sport Supervisors-Marketing, Assistant AD Compliance	Staff Time	One Sheet created and discussed with all staff	2015 - Fall (On-building)	
I.3.c.i Create/Maintain a database of graduates and business partners who have ties to Athletics & former athletic staff	Asst. A.D. for Student Dev. , Director of Alumni Lettermen's Association, Athletic HR Representative & Lobo Sports Properties General Manager	Staff Time	Meetings & regular upkeep of database	2015 - Fall (On-building)	
VI.2.a. Create a budget to purchase general athletics department apparel for all Athletic Department staff.	Equipment/licensing Dir.	\$10,000	Lobo Branded, not sport specific	2015 - Fall (On-building)	

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY						
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS	
VI.2.d. Create a program for season ticket holders/donors to identify and reward great team members	Asst. AD/Events & Sr. Assoc. AD Ext.	Use of GIK, Time, Printing or web based. Pins or signs "May I help you?"	Retention of "front liners", Fan Feedback	2015 - Fall (On-building)		
VI.4.a.iii. Create ways to enhance "YP" (young professionals) experience	Leadership Team/Sports Admin program	Time, organization	Participation	2015 - Fall (On-building)		
III.1.a.iv Update all facilities (fields, offices, signage, etc.)	Associate Athletic Director - Facilities	Staff time/Amount of \$\$	Review of all facilities to determine updates	2015 - Fall (On-building)		
III.2.b.ii Analyze current external affairs structure for improving communications & promotions of athletics	General Manager/Lobo Sports Properties	Staff Time	Review current external structure & strategies to improve communication. Shared with AD and staff	2015 - Fall (On-building)		
III.3.b.iv Analyze & Assess LoboTV department to keep up with current trends	Senior Associate AD/Lobo TV Producer	Staff time/Amount of \$\$	Strategies developed and created.	2015 - Fall (On-building)		
V.1.b.ii. Collect information about best practices at other institutions and implement where needed to improve procedures and oversight.	SWA/Asst. Athletics Director for Compliance	HR: staff time; membership costs for national organizations; possible travel costs to attend conferences and meetings	Annual review of best practices at peer institutions.	2015 - Fall (On-building)		

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY					
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS
V.1.c.ii. Ensure that all necessary documentation related to each camp and clinic is gathered and reviewed for adherence to department policies.	Asst. Athletics Director for Compliance and Director of Human Resources	HR: staff time	Annual review to ensure that paperwork has been turned in and reviewed for all camps/clinics.	2015 - Fall (On-building)	
V.2.a.i. Active review of openings on conference and national level.	Individual to be appointed	HR: staff time	Update list annually of spots on conference and NCAA committees that will be opening within the next academic year.	2015 - Fall (On-building)	
V.3.a.ii. Re-establish LOBO caravan to strengthen relationships with rural New Mexico. Take at least one trip each academic year.	Assoc. AD for Development and Senior Assoc. AD for Marketing	HR: staff time; cost to travel	At least one trip taken somewhere within NM each academic year.	2015 - Fall (On-building)	
IV.1.b.ii. Evaluate LoboTV sponsorship opportunities	Sr Assoc AD	Staff time, additional LoboTV staff ~35K	Number of subscribers, sponsorship revenue	2016 - Spring	
IV.1.b.iii. Explore/assess premium or reserved seating & parking opportunities at Olympic sports through the creation of premium or reserved seating and parking inventory outside of Football & Basketball	C.O.O., Associate AD/Development	Build premium seating at Olympic Sports facilities ~\$TBD	Premium seating revenue and Lobo Scholarship Fund donations	2016 - Spring	
IV.1.b.iv. Actively promote Athletic facility rentals by updating facility rental sales materials and website and increasing advertising regarding rental opportunities	C.O.O., IMG Learfield Ticket Solutions	Staff time, increase advertising budget ~\$5,000	Increase facility rental revenue	2016 - Spring	

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY						
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS	
IV.1.b.v. Propose exclusive tailgate opportunities at home events	Sr Associate AD, Associate AD/Development	Staff time, cost of tents, catering, extra game day staff	Increase in Lobo Club donations and tailgate revenue	2016 - Spring		
I.3.b.ii Implement curriculum/program	Assoc. A.D. Student Dev. & Amy Neel	Staff Time	Follow-up with participation data	2016 - Spring		
II.4.a.iii. Develop a library photos and notes of other MW and similar schools facilities	Head Coaches, Asst. Coaches, Sport Supervisor, COO Admin Asst.	Staff Time	Add to facility Master Plan wish list	2016 - Spring (On-Building)		
I.3.c.ii Provide targeted career informational sessions & excursions that tailor to the academic backgrounds of our student	Athletic Career Specialist & Life Skills Coordinator	Staff Time, Budget	Meetings, follow-up, Budget upkeep	2016 - Spring (On-Building)		
I.3.c.iii Create newsletter (quarterly) that focuses on anything and everything career Dev.	Athletic Career Specialist & Life Skills Coordinator	Staff Time	Follow-up with Career Center & other resource areas	2016 - Spring (On-Building)		
III.1.a.iii Quantify costs on all facilities (fields, offices, signage, etc.)	Associate Athletic Director - Facilities	Staff time	Costs assessment completed. Report shared with AD and staff	2016 - Spring (On-Building)		
I.1.c.iii Identify funding sources and raise the funds necessary to complete the Olympic Performance Center.	Dir. of Athl. Perf., Asst. Dir. of Athl. Perf & Athletic COO, VP for Athletics & Assoc. AD of Dev.	Staff Time/ \$5 Million	Funding sources identified and raised, construction complete	2016 - Summer		
I.2.e.ii Identify specifications of dining hall: identify potential space/existing space/size layout/staffing/etc.	Athletic COO, Nutritionist & Assoc. AD of Facilities	Staff/Time	Assessment of Needs Analysis	2016 - Summer		
I.2.e.iii Calculate cost/funding necessary to carry out project. Including cost of food.	Athletic COO, Nutritionist & Assoc. AD of Facilities	Staff/Time	Unknown until 1.2.e.i and 1.2.e.ii completed	2016 - Summer		

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY						
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS	
I.2.e.iv Develop a plan a of action for meeting student-athletes needs associated with a dining hall.	Athletic COO, Nutritionist, Assoc. AD of Dev. & Sr. Assoc. AD for Mktg and Rev.	Staff/Time	Plan of Action	2016 - Summer		
II.4.a.i. Appoint a committee to update facilities master plan	Chief Operating Officer, VP for Athletics, Assoc. AD Facilities	Staff Time / TBD	Committee completes plan and presents to Athletic Director	2016 - Summer		
IV.1.c.iv. Increase Lobo Club membership to 5,500 by improving our annual Ambassador Drive, enhancing our marketing efforts, investing in additional advertising, and selling more season tickets in donor areas at Football & Basketball	Associate AD/Development	Staff time, increase marketing budget ~\$5,000	Increase in renewal rates and overall membership number	2016 - Summer		
IV.1.c.v. Increase Revenue from Premium Seating areas to at least \$2.1 million	Director of Premium Seating	Increase advertising budget ~\$2,500	Increase in club seat season & single game tickets sold	2016 - Summer		
IV.1.d.i. Continue to explore strategy for securing special events at The Pit and University Stadium	C.O.O., Assistant AD/Events	Staff Time	Increase special event revenue at The Pit and University Stadium	2016 - Summer		
II.2.a.iii. Develop an employee recognition/reward program based upon contributions to recruiting.	Sports Supervisors, Head Coaches, Sr. Associate AD	Staff Time	Program developed and implemented. All staff fully engaged in recruiting	2016 - Summer (On-Building)		
II.1.a.iii. Recognize and reward competitive success in a central location.	VP for Athletics & Sport Supervisors	Costs TBD	Central location is identified and records and success become visible	2017 - Summer		

UNIVERSITY OF NEW MEXICO ATHLETICS • CHRONOLOGICAL ACCOUNTABILITY					
ACTION STEP	ACCOUNTABILITY	RESOURCE REQUIREMENTS	KEY METRICS	COMPLETION	COORDINATOR INITIALS
III.3.a.i. Coordinate needs assessment to enhance game day experience. This includes Wi-Fi technology in all venues	Associate Athletic Director/Facilities & Assistant AD/Events	Staff time/Amount of \$\$	Measure current costs and needs assessment to update.	2019 - Spring	

