



OFFICE OF THE
EXECUTIVE VICE PRESIDENT FOR
FINANCE & ADMINISTRATION

ANNUAL REPORT

FY 2023



EVPFORFA@UNM.EDU









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A WORD FROM THE EXECUTIVE VICE PRESIDENT FOR FINANCE AND ADMINISTRATION

Each year, as part of the University of New Mexico's permanent record, we compile an annual report that provides an inside look at the fiscal year history of the departments that report to the Executive Vice President for Finance and Administration (EVPFA). The purpose of the annual report is to ensure accountability and provide a measure of how well we are fulfilling our overall mission which includes teaching, research, health and public service programs.

I am very proud to present to you the EVPFA's Annual Report as it is a privilege to lead such a professional and accomplished organization. Below is the high-level fiscal cycle overview for FY 2022-23.

Our annual fiscal cycle began on March 22, 2022 with the Board of Regents approving a 3% increase in resident base tuition, a 5% increase in non-resident base tuition, with a flat rate starting at 15 credit hours for undergraduate residents, and a flat rate at 12 credit hours for graduate residents and undergraduate and graduate non-residents. In addition, the budget presented included a 1% increase in mandatory student fees as recommended by the Student Fee Review Board (SFRB) and \$15 increase in the ASUNM fee as approved by the student body in a constitutional referendum held on March 9, 2022.

State appropriations for Main Campus Operating increased by \$32.6 million, or approximately 15.5% for FY 2022-23. The legislature approved a 3% compensation increase for the fourth quarter of FY 2021-22, effective on April 1, 2022, and an additional 4% increase effective July 1, 2022, for an effective FY 2022-23 salary increase of 7.12%. In addition, the legislature approved a 2% ERB employer contribution increase for higher education.

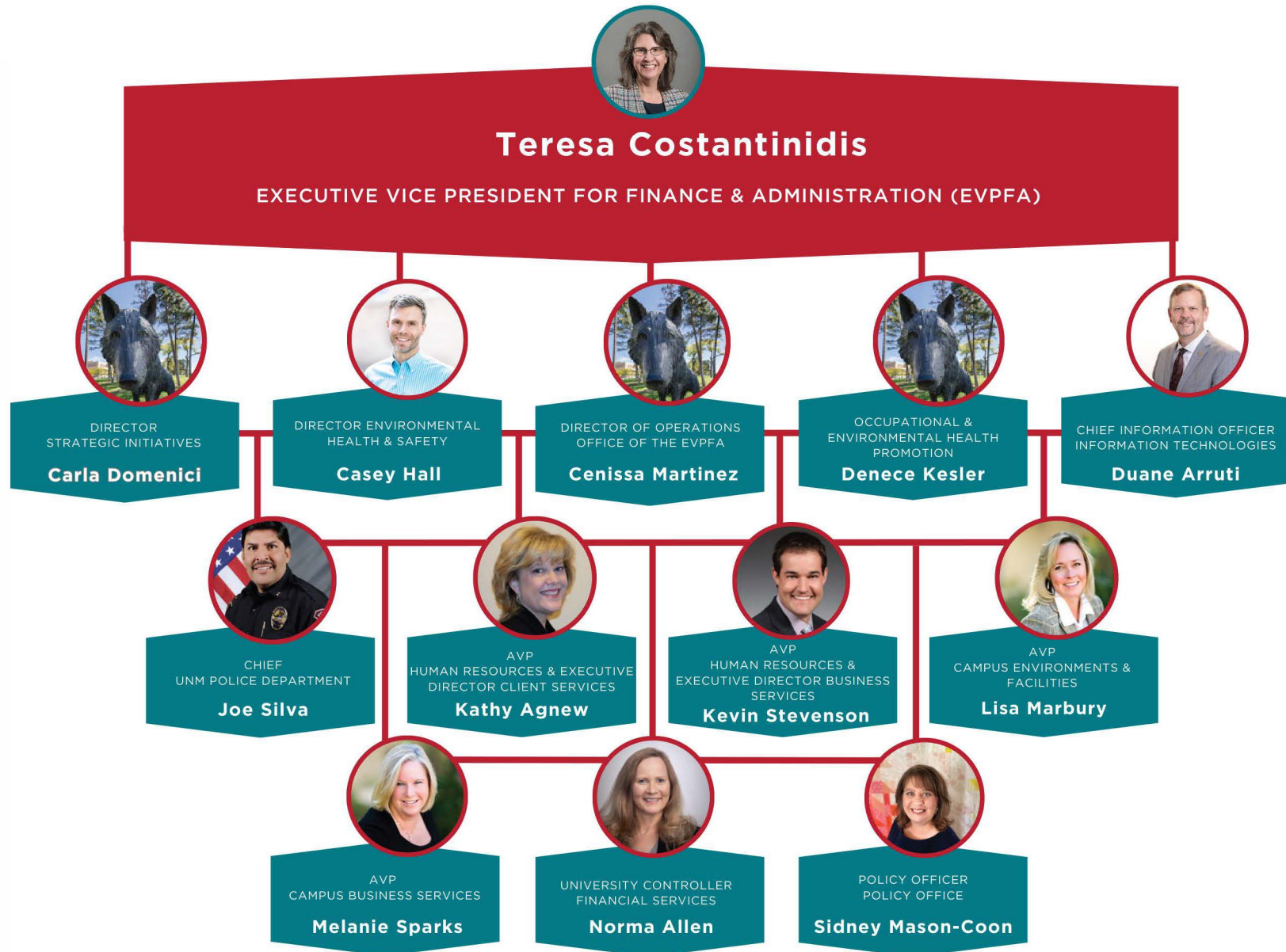
As I hope you will see, we put in a lot of hard work and effort throughout the year to successfully accomplish our goals which aim to continue to do great things for this institution. These countless successes and future initiatives of our team are carefully showcased in this annual report. I would like to thank our Finance and Administration team for their commitment, dedication and overall contributions this year. We look forward to continuing our services next year.

With kind regards,

Teresa A. Constantino



FY 2023 Organizational Chart





Environmental Health & Safety

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Director
CASEY HALL

Mission and Vision

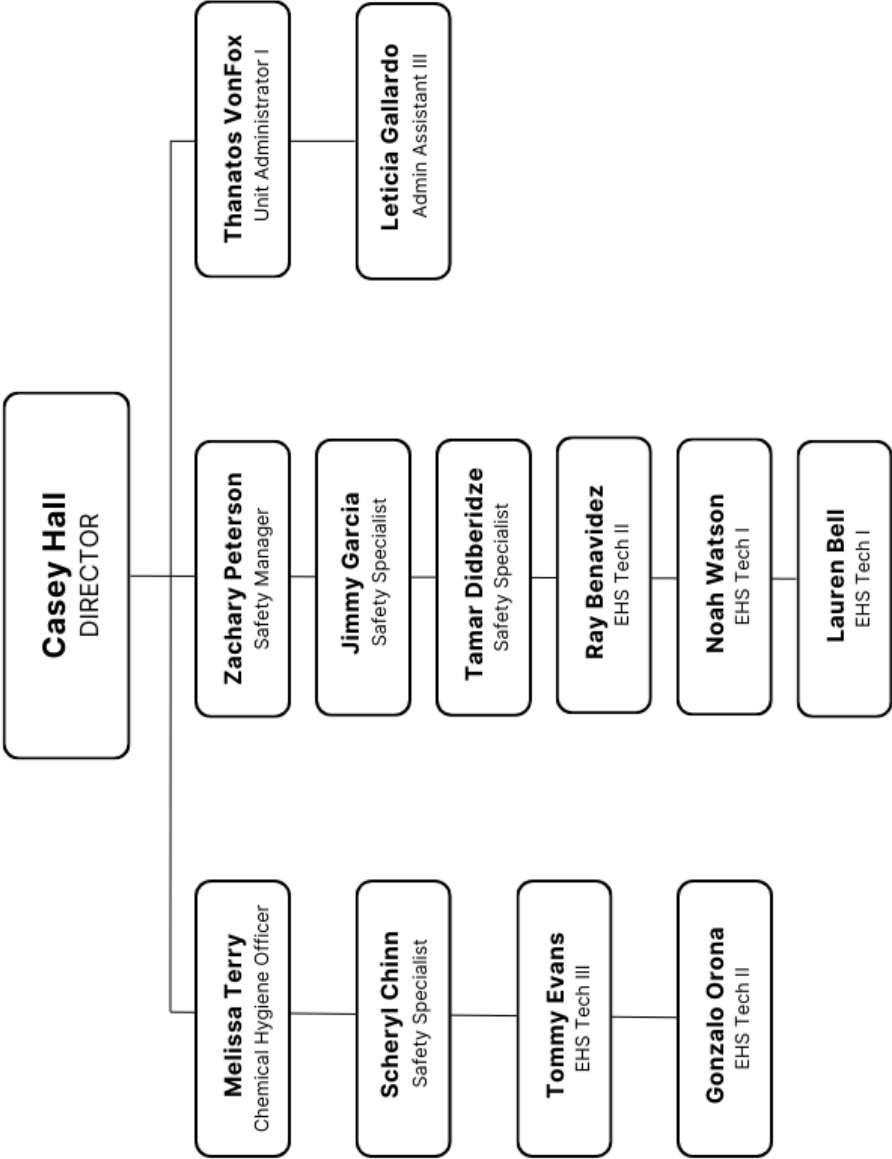
Mission

The Department of Environmental Health and Safety 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.

Vision

To become the premier occupational safety department and the organizational model of superior quality and service in the eyes of our customers, stakeholders, and the campus community.

Organizational Chart



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i. EXECUTIVE SUMMARY

Welcome to the Fiscal Year 2022-2023 Environmental Health and Safety Department (EHS) Annual Report. This report would not be possible without the dedication to excellence and collaboration our staff strives for daily.

As a team, we take great pride in our accomplishments and in contributing to the improvement of our community's health and safety. EHS continues to foster a culture that is both community-oriented and customer-focused. As a service organization, EHS values communication, collaboration, and customer service.

EHS provides guidance, services, and recommends plans that enable UNM to effectively execute its mission safely and while protecting the environment. EHS works in the best interest of UNM to provide collaborative institutional oversight while enabling local control and solutions to safety, health, and environmental issues.

The EHS department has brought forth three primary goals that guide departmental actions.

- Fostering a culture of safety on UNM campus
- Protecting the environment
- High quality and efficient service

EHS promotes a strong culture of safety and compliance by:

- Establishing expected behaviors through training and consultation
- Incentivizing desired behaviors
- Working with departments to disincentivize undesired behaviors
- Providing consultation on regulatory requirements and best practices

As UNM's regulatory representative, EHS ensures UNM remains compliant with local, state, and federal regulations by preparing and submitting reports and permit-required data to our regulators. EHS hopes this report gives you a look into the many programs EHS offers and the strides we have made in Fiscal Year 2022-2023 towards establishing a culture of safety at UNM.

In Fiscal Year 2022-2023, EHS received \$662,000 in Facility Investment Needs (FIN) funding. This funding was primarily used for fire suppression system testing and maintenance, fire alarm testing, and roof safety upgrades. EHS continued to support the Cancer Center per our Memorandum of Understanding (MOU) by providing safety and environmental health services. This MOU, along with an Instruction and General (I&G) allocation from Main Campus and the Health Science Center (HSC), provided EHS with a budget of \$1.6 million dollars. Staff salary and fringes made up approximately 77% of that budget.

ii. SIGNIFICANT ACCOMPLISHMENTS

Occupational and Construction Safety

- In Fiscal year 2021-2022, the Construction Safety Committee identified gaps in safety evaluation for contractors on construction projects. Correcting this issue was a major priority for EHS.
 - In Fiscal Year 2022-2023, EHS worked with Planning Design and Construction (PDC), Purchasing, Facilities Management (FM), and HSC Construction to develop a database to contain all contractor safety plans and Experience Modifier Rating (EMR).
 - EHS implemented monthly jobsite safety inspections for all construction activity on campus that has a Fatal Four hazard. The Fatal Four have been identified by Occupational, Health and Safety Administration (OSHA) to cause 60% of construction related fatalities. By focusing inspections on work with these hazards, EHS is ensuring the highest hazard construction work at UNM happens as safely as possible.
- EHS developed and implemented a new Departmental Audit program to review safety protocols and procedures within departments and provide guidance and assistance with updates. This program mirrors a typical audit by an OSHA inspector and thereby improves compliance within departments while also improving safety.

Fire Safety and Emergency Response

- Our department has spearheaded the revitalization of emergency plans throughout campus. EHS created a working group, template, and registration form. We then contacted every mail stop code on campus asking them to register and submit an Area Emergency Plan (AEP). Each level 3 org leader was then sent a letter and email detailing which departments under their purview needed to submit a plan. To date, we have received over 280 new or revised AEPs which have been reviewed for completeness.
- Utilizing a third-party contractor, EHS completed Fire Code Audits of FM Areas 1, 2, and 4. The resulting reports detail all work that must be done to bring buildings up to current code requirements. The buildings are currently in compliance due to grandfathering; however, any large remodel scope would require upgrading life safety systems. This information will help the Asset Management Program appropriately grade building value by considering life safety systems.

Administration

- In collaboration with Risk Services, UNM Medical Group, and Employee Occupation Health Services (EOHS), EHS developed and launched a new single reporting form for incidents and injuries across campus. This form reduced reporting to a single location. In tandem with this effort, EHS

developed and implemented a new Accident Investigation Process and Database that allowed for more thorough root cause analysis identification and hazard mitigation.

- In Fiscal Year 2021-2022, EHS undertook a comprehensive scanning and archiving project. This initiative aimed to digitize and organize vital records related to environmental health and safety. One of the pivotal outcomes of this project was the development of the asbestos records database, fully finished in Fiscal Year 2022-2023; a place where all historical and new records are stored, as most vendors now send fully electronic reports. This allows EHS to proactively identify areas where asbestos may pose a risk. Additionally, this is the first step in notifying all building managers on campus of the Asbestos Containing Materials (ACM) contained in their building.

Research Safety

- EHS has successfully increased chemical safety trainings across campus and outreach across campus.
 - The Training for Pizza incentive program that has resulted in a nearly 250% increase in attendance to lab safety trainings.
 - EHS increased attendance by over 200% to the Lab Safety Series – a three-part training course on the fundamentals of lab safety offered in Spring and Fall.
 - EHS spoke with over 1,800 people at outreach events such as Welcome Back Days, EHS Roadshow, New Faculty Orientations, New Graduate Student Orientations, Panel Discussions, the UNM Sustainability Fair, and Safety Week.
- EHS has been working to identify unsatisfactory facility conditions in laboratory spaces across campus.
 - EHS has identified 31 labs that did not have immediate access to a safety shower, then worked with PDC and a contractor to obtain a quote for the design and installation of the showers; EHS is currently in the process of requesting Facility Investment Needs funding to fix these issues across campus.
 - EHS identified 33 labs that needed oxygen sensors based on the room size and the quantity of liquid nitrogen stored in the room. We then applied for FIN funding, \$65,000 was allocated and installations are ongoing.

Environmental Health

- EHS has been spearheading efforts in incorporating improved Green Stormwater Infrastructure (GSI) into UNM's built environment. We employed a contractor to complete three studies of GSI at campus

locations which resulted in 30% engineering drawings which were funded through reserves. EHS then took the engineering studies and proposal for additional studies and applied for and received \$200,000 in grant funding from the NMED Clean Water State Revolving Fund. The funds will be used to complete a GSI pilot project in the Centennial Engineering Courtyard as well as fund three additional engineering studies across campus.

- EHS identified a proposed air quality regulation that poses a threat to UNM's mission, expansion, and current operations. The regulation is currently being considered by the Albuquerque Bernalillo County Air Quality Control Board. UNM, through close collaboration with EHS, became a party to the rule making. UNM has set out through the pre-hearing negotiation process and rulemaking hearing with the goal of producing a final rule that is protective of human health while allowing UNM and UNM Hospital to expand services and achieve their missions.

iii. FUTURE PLANS

In Fiscal Year 2023-2024 and beyond, EHS plans will continue to promote safety, environmental protection, and high-quality service. Selected projects EHS will focus on are outlined below:

- In Fiscal Year 2023-2024 EHS will complete a culture of safety assessment for faculty, staff, and paid students. The assessment will be completed through an outside vendor and includes a campus wide survey, focus groups, leadership interviews, and a final culture assessment report with an action plan to improve the safety of the campus community through cultural changes.
- EHS will continue to advocate for and find pathways to fund green stormwater infrastructure on campus. Three projects currently planned are:
 - Remodel of the Centennial Engineering Courtyard to integrate GSI and improve communication and training of the importance of GSI to future engineering students. This project will be fully complete in Fiscal Year 2023-2024.
 - Complete three engineering studies of potential GSI locations on campus with 30% drawings and an estimated budget. This project will be complete by early Fiscal Year 2024-2025.
 - Collaborate with the Albuquerque Metropolitan Arroyo Flood Control Authority to begin studying the North Diversion Channel south of Indian School Road. The study will investigate the feasibility of GSI in the North Diversion Channel and potential integration into a north campus green space. The study will begin in Fiscal Year 2023-2024.

- EHS is working with Albuquerque Fire & Rescue to develop Pre-Incident Plans (PIPs) for our highest risk buildings across campus, beginning with the dormitories.
- Lithium ion batteries are high energy density devices that can fail catastrophically resulting in fires. EHS will partner with Facilities Management, campus experts, and users to develop programs or policies governing the use of lithium ion powered transportation on campus with a goal of preventing fires.



FINANCIAL SERVICES

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**UNIVERSITY
CONTROLLER**
NORMA ALLEN

Mission

The mission of Financial Services (FS) is to provide sound stewardship of the University of New Mexico's fiscal activities while meeting the needs of students, faculty, and staff who are engaged in learning, teaching, research, and community service activities.

Our ongoing commitment serves to:

- Educate students, faculty, and staff about the compliance requirements associated with various state, local, federal, and agency rules, regulations and policies concerning financial expenditures.
- Deliver accurate, timely, and useful financial reports to leadership and external constituencies.
- Stay current in the latest accounting standards and regulations. Apply them to business and operational practices.
- Service our faculty, staff, and student customers in an efficient, timely, courteous, and professional manner, while balancing adherence to State, Federal, and University policies.

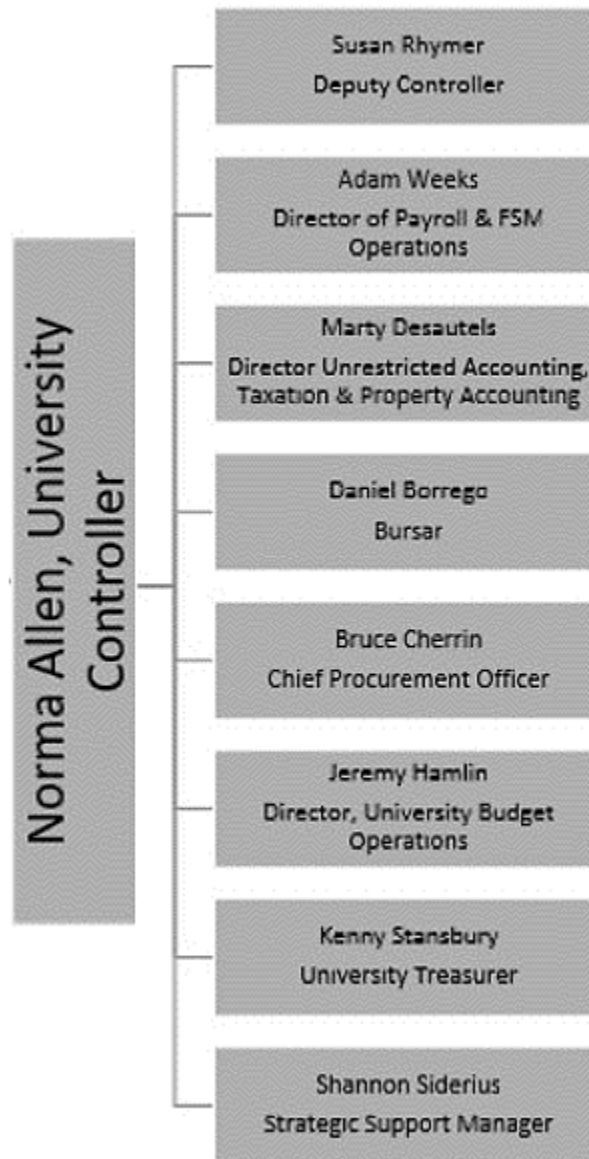
Vision

We seek to be recognized as the most knowledgeable, trusted, and respected organization at the University of New Mexico (UNM) regarding financial information, compliance, and safeguarding assets.

Improving our processes and equipping our staff will enable us to provide the best customer service and training to students, faculty, and staff.

Providing a work environment that supports our employees and the work they do is essential.

ORGANIZATIONAL CHART



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i. EXECUTIVE SUMMARY

Welcome to the Fiscal Year 2022-2023 Financial Services (FS) Annual Report. This report would not be possible without the dedication to excellence and collaboration our staff strives for daily.

As a team, we take great pride in our accomplishments and in contributing to the improvement of financial transactions and processes. Financial Services continues to create and foster a culture that is both community-oriented and customer-focused. As a service organization, Financial Services values communication, collaboration, customer service and process improvement.

Financial Services ensures compliance with all financial policies, rules, and regulations adopted by the University and/or imposed by external agencies, including state and federal audit and regulatory requirements and generally accepted accounting principles. Additionally, the organization oversees the maintenance of the official financial records of the University.

Our organization is made up of thirteen (13) departments and six (6) sub departments that reside within Purchasing and University Services. We are responsible for all central accounting functions, procurement, risk management insurances, mailing, shipping, receiving, surplus property, research chemical storage and other vital services for the University. Financial Services operational budget for Fiscal Year 2022-2023 was \$27,934,641 of which \$4,304,000 was budgeted for risk management insurance premiums for the University.

ii. SIGNIFICANT ACCOMPLISHMENTS

- **Controller's Administration**
 - The University Controller along with the Deputy Controller established the FS Leadership Team which is a leadership body that meets weekly to discuss strategic initiatives, organizational issues as well as considers and approves department budgetary requests. This is fundamental to ensure that the organization and department requests are in alignment with UNM's 2040 goals and objectives.
 - Completed the external access control to the John and June Perovich Business Center. Also, we activated internal access control to various suites that were currently inactive. In addition, we installed access control to the Purchasing Suite which currently did not have an access control mechanism. This will provide a safe and secure working environment for our employees.
 - Hired a full-time University Treasurer and engaged National Association of College and University Business Officers

(NACUBO) consulting to do a treasury review and provide recommendations. Previously, due to budget cuts, the treasury responsibilities were being done by a .25 working retiree. This position is a critical component of Financial Services because it provides important cash flow information that informs how much cash is needed in our general depository account to meet payroll and other obligations and opportunities for sound and profitable investment strategies.

- Hired a Strategic Support Manager to oversee and manage hiring actions, performance management, building coordinator responsibilities, and administrative functions within Controller's Administration. Previously, this position was eliminated because of budget cuts. This position is critical because it supports the University Controller's strategic initiatives, FS human resources, operational safety, and administrative functions.
- Executive Vice President for Finance and Administration (EVPFA) 2040 tactic: Rolled out individual budgeting and projections responsibilities to FS managers and directors. Worked with Deputy Controller on refinement of Workday model and development of UNM 10-year financial plan including income statement, balance sheet, and cash flows.
- Financial Reporting, Finance Systems Management IT and Business Process Improvement Team
 - Deploying appropriate technologies and engaging in policy review to facilitate business process refinement throughout FS. Instituting Smartsheet and Oracle Apex to facilitate a variety of process improvements throughout FS.
 - Development of an FS Business Process Improvement team to serve as an auxiliary unit designed to focus on infrastructure tasks such as partnering with departments to refine key business processes in order to reduce administrative burden and institutional expertise ahead of key personnel retirements.
 - Creating a culture of financial resources planning, alignment, and accountability throughout the organization by introducing the Workday Adaptive Planning Project which seeks to further decentralize the annual budget development process and standardize index reconciliations. This application will refine programming and capabilities of Workday Adaptive Planning UNM product model which will forecast institutional cash flows, identify borrowing capacity, and provide balance sheet information in support of the University Controller and EVPFA.

- The development of a 10-year institutional forecast encompassing income statements, balance sheets, and capital projections.
- Office of Planning, Budget, and Analysis (OPBA)
 - Budget Leadership Team (BLT) and Student Fee Review Board (SFRB) are a few of the university-wide initiatives OPBA has been involved with. Others include Tuition and Fee Simplification Working Group, Capital Planning Leadership Team (CPLT), Debt Investment Advisory Committee (DIAC), Facilities Investment Needs Committee (FIN), Fire Safety Capital Committee, Loss Prevention and Control Committee (LPCC), Asset Management Program Committee (AMP) and Retirement Plan Investment Committee (RPIC).
 - In conjunction with FS and EVPFA, OPBA is promoting a culture of multi-year budgeting and planning to align with Objective 5 of Goal 4: Sustainability in UNM's 2040 Strategic Planning Framework. This effort will align with Workday Adaptive Planning mentioned within the Financial Reporting summary.
 - Successfully redesigned the Operating and Capital Budget Book presented to the Board of Regents (BOR) and posted in the OPBA website. The Fiscal Year 2024 Budget Book redesign included incorporating UNM branding elements provided in consultation with University Communications and Marketing (UCAM), a fully linked table of contents, an Executive Summary from President Stokes, a 'UNM by the Numbers' summary sheet, a capital projects map, and introduction to the budgeting process at UNM. In addition, with the help and support of the Financial Services Reporting Team, we were able to incorporate UNM branding elements (font and colors) into our tables and reports through the OPBA MyReports portals.
 - Successfully compiled and submitted the new fiscal original budget, revised budget, and report of actuals for Main Campus funds to NMHED. OPBA staff worked with Health Sciences and the Branch Campuses to coordinate and ensure consistency on all submitted reports. New Fiscal Year and revised budgets were presented to Finance and Facilities Committee (F&F) and BOR for approval prior to submission to NMHED.
 - Provided support to EVPFA units as part of mid-year budget projections.

- The Bursar's/Cashier's Office
 - Implemented Automated Clearing House (ACH) validation for LoboWeb Payments as required by National Automated Clearinghouse Association (NACHA).
 - Worked with Information Technologies (IT) to change retiree billing from a paper and e-bill process to an e-bill with paper opt-in process. This effort will support the University's goals for sustainability as well as generate budget savings.
 - Reviewed and improved the fiscal management of the office by promoting three (3) internal employees and hiring a position to replace one of the promotions.
 - Presented to multiple constituent groups such as: the Advising Institute, Budget Leadership Team Subcommittee on Tuition and Fee Modeling, Campus Compliance Committee, Enterprise Resource Planning (ERP) Leadership, ERP Operations Committee, General Person Data Standards Committee, Housing Appeals Committee, New Student Orientation, Presidential Scholarship Selection Committee, and Residency Appeals Committee.

- Contract and Grant Accounting (CGA)
 - Streamlyne Award Module
 - CGA actively participated in the implementation of Streamlyne's Award Module. This included collaboration with the Office of Sponsored Projects (OSP) in determining new processes as both departments are involved with the module. The award module implementation occurred November 1, 2022.
 - Streamlyne to Banner Integration
 - CGA collaborated with IT in preparation for Phase I Implementation of the Streamlyne-to-Banner integration. Phase I was the import of overall grant information from Streamlyne to Banner. CGA's participation included mapping fields from Streamlyne to Banner, discussions of errors, and major testing for the integration process. Phase I was implemented July 1, 2023.
 - New Effort Certification Process
 - CGA has been participating in a committee to review and replace the current Effort Certification process with a system that is more efficient and user friendly for Principal Investigators (PI's) and Department Administrators while retaining compliance with Federal requirements. The

expected go-live date for this new process is in the Quarter 2 of Fiscal Year 2024-2025.

- PI Financial Responsibility
 - CGA replaced the restricted award signature page with a Streamlyne acknowledgement option for certifying PI's financial responsibility. For older grants not in Streamlyne, the signature page was updated to only require PI signature certifying their financial responsibility on the award. The new process eliminates duplication done by system approval processes and reduces administrative burden to the departments.
- Section 117
 - In collaboration with The Office of University Counsel (OUC), CGA reviewed foreign gift and award information for years prior to CGA's involvement with Section 117 of the Higher Education Act, updated processes, and assisted in responses to the US Department of Education Office of the General Counsel's communication regarding reporting.
- Finance Systems Management (FSM) Operations
 - FSM Operations continues a successful partnership with ChromeRiver in championing continuous process improvement efficiencies and effectiveness which lead to resolution of operational issues, improved compliance, outstanding customer support to campus and further collaboration with ChromeRiver users. Redesigns to make a more user-friendly interface were also completed.
 - Successfully coordinated and completed numerous Banner upgrades for Financial Services.
 - Completed all month-end and year-end processes, continued Chart of Accounts maintenance, finance security maintenance and support Effort Certification and Payroll processes.
 - Consolidated Banner Authorizations Requests (BAR) security roles for faculty who must certify effort. This will alleviate the need for faculty to select multiple roles to certify effort.
 - Built a process to enhance direct deposit vendor changes for Accounts Payable.

- Payroll
 - Payroll registrations and withholding for employees working outside of the state of New Mexico continue to progress. Currently, Payroll has registered in 34 states outside of New Mexico.
 - New vital errors process created for Employment areas and Payroll to make aware and minimize the impact to UNM employees, Employment areas, and Payroll staff.
 - Payroll collaborated with Human Resource (HR) Benefits to create Banner tracking regarding Family Medical Leave (FML).
- Property Accounting (formerly Inventory Control)
 - Streamlined operations by combining the Inventory Control department and Capital Asset Accounting functions into a new department, Property Accounting.
 - Conducted and facilitated the Fiscal Year 2023-2024 Annual Physical Inventory counts as required by law, achieving 100% completion campus-wide.
 - Revised UNM Policy 7710, Property Management and Control, to exclude non-capital computers and drones from UNM's official Annual Physical Inventory, resulting in significant reduction in workload across campus, including Health Sciences, and branch campuses.
- Purchasing and University Services
 - The Purchasing Department served as the lead agency for the State of New Mexico via OMNIA Partners Group and Cooperative Purchasing Partners in the solicitation, evaluation and awarding of Job Order Contracts that allows UNM and other State entities the ability to utilize the agreement for construction jobs up to \$4M and will provide a rebate to UNM when entities utilize these agreements.
 - Print Management developed and implemented a new multifaceted tracking and billing system using the Oracle Application Express (APEX) application, adding efficiencies and detailed information for departments while simultaneously adding a stable environment in support of the program.
 - The Strategic Purchasing Team enhanced end-to-end training processes on Purchasing, LoboMart, Remote Monitoring and Management (RMM), and UNM Travel training for departments,

including both virtual and in-person training sessions, conducted campus visits to all UNM Branch campuses and provided on-demand virtual courses via Learning Center to assist employees and departments across the enterprise.

- Purchasing Card (PCard) and Accounts Payable (AP) coordinated efforts with Walmart and Kroger to establish a central process for ordering and receiving bulk gift card orders. The centralization allows for a more efficient process for departments requiring cards in bulk.
- The UNM Copy Center enhanced and grew production efforts in Fiscal Year 2022-2023, acquiring additional business from a multitude of UNM departments across campus evolving into new avenues including apparel, signage, branding, banners, backdrops, stickers, and promotional items.

- Risk Services

- Completed site visits, risk assessments, and risk awareness training at Taos and Los Alamos Branch campuses.
- Facilitated the acquisition of a cyber insurance policy for the University system at a substantial year over year premium discount of approximately 54%, due to lower than anticipated claims volume and additional security controls.
- Developed and deployed volunteer and group accident insurance coverage online signup tools to increase access and utilization of these coverages.
- Managed the transfer of First Baptist Church real property to the property coverage umbrella for UNM main campus, effectively reducing the net property insurance premium spent and the administrative burden associated with managing a separate property insurance policy for this asset.
- Led conversations involving UNM Hospital, Bernalillo County Metropolitan Detention Center (MDC) Joint Powers Authority, and the State of New Mexico Risk Management Division in the acquisition of medical malpractice liability coverage for hospital employees providing medical care to MDC inmates.

- Taxation

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

- Processed and filed monthly New Mexico Governmental Gross Receipts Tax.
 - Completed IRS 1042-S tax reporting for the University.
 - Provided website updates and guidance for Foreign Tax, UBIT, and other tax related topics.
- Treasury (formerly CCMS)
 - Treasury Staffing
 - Overhauled and re-established the UNM Treasury function, including hiring a new University Treasurer and a Financial Services Accountant, Sr.
 - Banking
 - Negotiated higher interest rates earned on cash balances with US Bank, 4.25% for commercial paper and 3.75% for ICS, effective May 5, 2023. Improved the earnings credit rate (ECR) for the checking balance. The ECR offsets the US Bank fees. Improvement in the ECR is to reduce the average daily balance held in checking, moved the funds to interest-bearing accounts, and still paid no (or low) net fees to US Bank.
 - NACUBO Treasury Consulting Project
 - Managed and coordinated the NACUBO Treasury Consulting Project to include coordinated on-site interviews with participants. Provided detailed framework on reporting findings to the NACUBO consultant. Shared the final report with Financial Services leadership and the Executive Vice President for Finance and Administration.
 - Cash Flow Projects
 - Improved short-term cash projections by providing detailed cash flow point analysis to the Controller weekly to plan the week ahead and schedule transfers. The detailed projections included line items for all significant (\$0.5M+) cash transactions for the remainder of the current month.
- Unrestricted Accounting
 - Provided day-to-day management oversight for other Financial Services departments including Risk Services, Treasury and Property Accounting.

- Absorbed Property Accounting department in conjunction with the elimination of its management team resulting in significant salary savings for Financial Services.
- Completed annual filing of State of New Mexico Unclaimed Property Reporting for Accounts Payable and Payroll, IRS 1099-K tax reporting and filing for the University.
- Participated in beta-testing and product development for enhancements and challenges pertaining to ChromeRiver, banner and strategic projects.

iii. FUTURE PLANS

- Controller's Administration
 - UNM Ambassador Program will be implemented in January 2024. This program is expected to be a comprehensive professional development practicum spanning 18 months focusing on FS personnel to provide in-depth theory and background on the FS organizations, an overview and discussion regarding regulatory frameworks governing institutional transactions, fiduciary responsibilities to the public in performance of responsibilities, review of current state existing processes for recommendations on improvement, along with the opportunity to cross-train with other departments to broaden and deepen understanding of other areas.
 - Finish the implementation of the joint project with Lobo Quality Improvement Process (LQIP), Human Resources, the Office of the VP for Research and Health Sciences Finance and Administration to streamline the process of staff hires and decrease the position vacancy time from job posting to offer letter generation.
 - Work on UNM 2040 EVPFA tactics: Multi-year budgeting and projections for FS managers/directors, ERP Roadmap and Strategy, Workday Adaptive Planning improvements, financial metrics dashboard, and Heliocampus process improvements.
- Financial Reporting, Finance Systems Management IT and Business Process Improvement Team
 - Align the FS technical environment to support the University Controller and EVPFA by performing a current state assessment of all financial, budgeting and procurement systems.

- Further enhance, accelerate, and refine financial statement preparation processes.
 - Work on UNM 2040 EVPFA tactics regarding Workday such as: finishing the refinements on the Workday model and UNM 10-year plan including income statement, balance sheet, and cash flows. Working with pilot departments to guide implementation of Workday instance for use and a development of a Workday dashboard to track financial metrics for the University.
 - Continued application and process improvement development using SmartSheet and Oracle Apex.
- Office of Planning, Budget, and Analysis (OPBA)
 - Finalize the redesign of the Quarterly Consolidated Financial Report presented at Finance and Facilities Committee (F&F), with a targeted Quarter 1 implementation date.
 - Work with Financial Services Reporting Team and Deputy Controller on Workday Adaptive Planning and multi-year planning projections, assumptions, and inputs for Core Fund Financial Plan, Debt Advisory Plan, and UNM 10-year Financial Business Plan.
 - Tuition Remission Simplification Working Group to further explore simplifications to the existing tuition and fee structure.
 - Infrastructure assessment simplification and explore new internal funding models as a recommendation to present to executive leadership and BLT. This includes working with IT on the IT funding model proposal. This would eliminate Banner Tax and move to a headcount fee.
 - Moody's to maintain the University's Aa3 credit rating and with S&P to keep UNM's AA- credit rating.
- The Bursar's/Cashier's Office
 - Streamline and automate the Tuition Remission process by working with Human Resources (HR), Payroll and FSM.
 - Create a process with the Student Financial Aid Office to better track and transport scholarship checks that require student endorsement.
 - Automate and streamline the credit card fee reallocation process and transfer it to the Treasury Organization.
 - Automate and streamline the Petty Cash Reimbursement process.
- Contract and Grant Accounting (CGA)

- Coordinate the National Science Foundation's (NSF) site to visit to UNM in January 2024. NSF will evaluate the effectiveness and efficiency of CGA's policies and procedures for managing restricted federal funding along with CGA's internal controls while offering guidance.
- Complete Phase II of the Streamlyne to Banner integration with expected roll out early in Quarter 2 of Fiscal Year 2023-2024. Phase II involves the import of fund, billing and terms, and conditions information into Banner. Phase II will reduce hours of manual work currently being performed by CGA.
- Complete the new Effort Certification Process with expected roll out in Quarter 2 of Fiscal Year 2023-2024. The new process will bring greater efficiency to reducing non-compliance on awards due to late submittal of certifications.
- Collaborate with Health Sciences (HS) regarding training materials, award closeout processes, and budget revisions. The goal is to give increased overall support to the research community while also creating the same processes for both Main and HS campuses.
- Reassess and update internal processes to ensure internal controls are working effectively and processes are as productive as possible while reducing administrative burden to CGA and/or departments.
- Finance Systems Management (FSM) Operations
 - Implement Effort Certification reporting alternative with CGA Offices.
 - Continue operational automation enhancements and monitoring.
 - Evaluate FSM enhancements.
- Payroll
 - Continue implementing of Payroll registrations and withholding for employees working outside of the state of New Mexico.
 - Support to HR for leadership and compliance initiatives.
 - Create a new process for Employment Areas and Payroll to work all payroll vital errors.

- Assess and improve Non-Standard Pay processes.
- Assess and improve File Maintenance file feeds into payroll processes.
- Evaluate time-keeping system for Campus wide upgrade and/or new application.
- Property Accounting (formerly Inventory Control)
 - Coordinate and implement an improved Inventory Application to be developed in-house by FSM using APEX.
 - Implement new Asset Write-Up guidelines for fully depreciated assets.
 - Update and implement new checklist for Donated Assets to increase process efficiencies.
 - Research and implement a new label developer to improve asset tag printing.
 - Continue to review areas where duplication of efforts may exist to streamline processes.
- Purchasing and University Services
 - UNM Travel will roll out a Non-UNM travel booking feature in Fiscal Year 2024 to provide departments with options for booking non-UNM employee business travel (students, interview candidates, etc.) with the same convenience, safety, value, and a multitude of booking options both domestically and internationally currently utilized by UNM staff and faculty.
 - PCard/AP will centralize bulk gift card orders in Fiscal Year 2023-2024 to create a more efficient process for departments requiring cards in bulk for business purposes.
 - Surplus Property will work with Property Management to provide a training platform for AppTree to the campus in Fiscal Year 2023-2024.
 - The vendor Virtual Payables (vPayables) effort will expand to partner with a provider and develop processes to enable vendor payments for virtual card which will allow for convenience and rebate opportunities.
 - Focus efforts on LoboMart punchout to identify new strategic partners, sponsors, punchout vendors and develop a list of small businesses for the UNM community.

- Risk Services
 - Complete risk assessments and training at the two remaining branch campuses.
 - Develop and lead a recurrent risk roundtable to include OUC and Compliance, Ethics, and Equal Opportunity (CEEEO) to facilitate more consistent communication for efficiency and accuracy in the handling of liability-based claims against the University.
 - Review with stakeholders and formalize changes to third-party facility user requirements including changes to applicable University Administrative Policy (UAP).
 - Continue development of a driving privileges committee to administer UAP 7780, Use of University Vehicles, including recommendations for corrective action when policy violations occur.
 - Obtain and develop additional staff to support an Enterprise Risk Management approach to achieve Risk Services objectives across the University campuses. The additional staff and systems are necessary due to record high campus enrollment, new facility construction, (the new University of New Mexico Hospital Critical Care Tower) and an increasingly challenging liability claims environment. Additional pricing pressures in the property and cyber insurance markets will also require additional underwriting and claims oversight.

- Taxation
 - Undergo a process improvement project to automate Unrelated Business Income Tax activity.
 - Determine and finalize out-of-state filing requirements related to remote employees.
 - Improve Taxation website to address Fringe Benefit and Tuition Expense Review guidelines.
 - Work to implement abbreviated W-8BENE tax form with foreign tax treaty language for department use.
 - Build PowerPoint presentation for Taxation website with FAQ's.

- Treasury (formerly CCMS)
 - NACUBO Treasury Consulting Project
 - Resolve remaining priority NACUBO report recommendations, financial ratio analysis, five-year cash

- flow projection, and operating cash investments liquidity and oversight.
- Cash Flow Projections
 - Enhance cash flow projections by projecting cash flow further to predict cash low points far in advance of when action is required. The new projections will improve the precision of short-term cash flow models with improved detail and accuracy. The goal of these enhancements is to provide better information further in advance so that realized losses on investment transactions can be minimized while meeting the University's cash needs.
 - Investment Reporting
 - Work with Financial Services Team (with input and guidance from the Executive Vice President for Finance and Administration) to redesign the investment reporting. Incorporate the redesigned investment reports into regular reporting.
 - Collections and Accounts Receivable
 - In May 2023, the Treasury Program team began work to enhance collaboration with institutional core offices to improve UNM's revenue cycle. This work to improve accounts receivable collection time and communication will decrease receivables, increase cash balances, and increase interest earned on cash reserves in Fiscal Year 2024-2025.
 - Higher Cash Interest Rates
 - Negotiate higher rates for Commercial Paper and ICS.
 - Implement a Commercial Paper sweep process that would allow UNM to earn interest on the depository balance (typically \$15M). Using the typical \$15M balance, this would produce a net \$500k in increased interest revenue over a year (assuming current interest rates).
 - Unrestricted Accounting
 - Use technology and automation to streamline the existing manual, paper-based, petty cash process.
 - Work towards clarification and application of the rules and laws related to donor cultivation expenses, as they relate to the State of New Mexico's anti-donation laws.

- Update and overhaul Internal Service Center Processes.

iv. **APPENDIX**

- The Bursar's/Cashier Office Statistics

	FY22		FY23	
	Trans	Dollars	Trans	Dollars
Cashier Receipts	49,212	72,872,705	49,115	82,122,346
LoboWeb Credit Card Payments	22,187	21,263,621	22,858	18,151,864
LoboWeb ACH Payments	74,801	69,599,951	68,735	55,420,525
Other Payments ⁽¹⁾	99	293,471	646	3,833,464
MarketPlace Payments	69,600	11,474,523	67,857	11,685,890
Total Receipts	215,899	175,504,271	209,211	171,214,089
LoboWeb Direct Deposit Refunds	60,017	90,402,535	43,633	86,175,065
Student Check Refunds and Short Term Loans	21,444	20,052,225	13,036	17,836,330
	81,461	110,454,760	56,669	104,011,395

⁽¹⁾ Includes international wires and 529 payments processed by Flywire as well as direct wire transfers.

Tuition and Fee Revenue	FY22	FY23
Undergraduate – Resident and Non-Resident ⁽¹⁾	\$ 133	\$ 136
Graduate – Resident and Non-Resident ⁽²⁾	59	52
Mandatory Student Fees ⁽³⁾	0	41
Course Fees ⁽⁴⁾	22	8
Total Revenue (to nearest million)	\$ 214	\$237

⁽¹⁾ FY22 included tuition, mandatory student fees, course premiums, and differential tuition. Mandatory student fees are reported separately in FY23.

⁽²⁾ FY22 included tuition, mandatory student fees, and differential tuition. Mandatory student fees are reported separately in FY23.

⁽³⁾ FY23 includes mandatory student fees, the athletics student fee, the student technology fee, the student health, and counseling fee, the ASUNM Fee, and the GPSA fee.

⁽⁴⁾ FY22 included course fees, the athletics student fee, the student technology fee, the student health, and counseling fee, and the GPSA fee. FY23 only includes course fees.

FY23 only includes course fees

- Payroll Statistics

FY23 Payroll direct deposits issued	240,753
FY23 Payroll paper checks issued	1,560
CY2022 W-2s issued	16,802 (8,172 were electronic consent)

- Purchasing and University Services Department Statistics

Purchasing Department	FY21	FY22	FY23
RFP's Issued	42	46	45
IFB's Issued	5	8	7
Total Solicitations	47	54	52
PO's Issued (\$)	\$168,232,029.16	\$159,323,381.59	\$203,205,728.26
PO's Issued	13,128	26,464	26,565
CO's Issued	3,917	4,281	4,177
PCard/FCard \$	\$47,397,791.15	\$61,090,246.22	\$68,939,309.53
PCard & Accounts Payable	FY21	FY22	FY23
Vendor Setups and Maintenance Requests	8,545	5,695	7,977
Banner Invoices	2,235	2,333	1,909
Direct Pay Invoices	42,100	26,097	40,240
Bookstore Invoices	4,741	6,034	4,815
PCard	91,124	124,717	136,921
Total Invoices Count	140,200	159,181	217,220
Checks	43,948	55,711	43,803
ACH Direct Deposits	41,075	34,636	41,280
Wire Transfers and Foreign Currency Checks	435	571	614
Total Disbursement Count	85,458	90,918	85,697
PCard/FCard \$	\$47,397,791.15	\$61,090,246.22	\$68,939,309.53
Total Disbursements Amount	\$853,188,348	\$848,443,852.69	\$969,620,758.06
Mailing, Shipping & Receiving	FY21	FY22	FY23
Outgoing Packages & Mail (Excluding Bulk)	647,935	655,750	587,176
Incoming USPS Mail Pieces	765,100	992,950	737,667
Campus Mail	125,050	323,200	148,175
Accountable Packages & Mail	65,905	73,258	80,257
Bulk/Permit Mail	1,276,185	1,666,758	3,086,582

FedEx Incoming	14,823	15,175	16,336
FedEx Outgoing	903	881	1,260
UPS Incoming	16,173	19,450	20,818
UPS Outgoing	1,660	1,182	1,431
Surplus Property	FY21	FY22	FY23
Total Surplus Property Items	9,595	24,967	26,055
Inventoried Equipment	1,742	5,734	5,719
Non-Inventoried Equipment	7,853	19,233	20,536
Number of Pickups	481	1,125	1,219
Records Management	FY21	FY22	FY23
Total Inventory (Boxes)	6,184	5,833	4,763
LoboMart Requests	188	104	75
CRLS	FY21	FY22	FY23
Total Sales	\$814,180.44	\$854,028.31	\$908,515.15
Total Orders	7,145	7,071	6,946
Stock Orders	5,963	6,030	6,783
Customer Orders	1,182	1,041	163
Copy Center	FY21	FY22	FY23
Black & White Copies	4,122,968	4,771,459	6,487,254
Color Copies	2,086,568	2,649,116	2,926,989
Total Copies	6,209,536	7,420,575	9,171,997
Total Sales (\$)	\$495,453.02	\$867,528.03	\$1,216,262.81

- Risk Services Statistics
 - Property Claims - July 1, 2022 to June 30, 2023
 - UNM: 68
 - UNMH: 3
 - SRMC: 2
 - Valencia: 0
 - Gallup: 3
 - Los Alamos: 0
 - Taos: 0
 - Auto Claims - July 1, 2022 to June 30, 2023
 - Total: 34
 - Liability Claims - July 1, 2022 to June 30, 2023 (non-civil rights or medical malpractice)
 - Total: 46
 - Workers' Compensation Claims - July 1, 2022 to June 30, 2023
 - Medical (total): 107
 - Most frequent
 - Needlestick: 21
 - Lost Time: 17
 - Workers' Compensation claims originated from the following areas:

- UNM: 47
- HSC: 46
- UNMMG: 12
- Valencia: 0
- Gallup: 1
- Los Alamos: 0
- Taos: 1
- Total: 107

- Unrestricted Accounting Statistics

Document/Process	FY20	FY21	FY22	FY23	FY22/FY23 Variance
Purchase Requisitions	2,753	2,513	3,663	4,962	1,299 (35.5%)
Petty Cash	122	8	38	38	0 (0.0%)
NSP and other Compensation Docs.	26	13	22	3	-19 (86.4%)
Chrome River Requests	23,116	17,556	15,273	17,389	2,116 (13.9%)
Journal Vouchers	10,769	9,801	13,722	14,622	900 (6.6%)
Scholarships Workflow Documents*	3,429	2,921	3,519	3,612	93 (2.6%)
Total Documents	40,215	32,812	36,237	40,626	4,389 (12.1%)
NSAR Billings (# invoices)	2,680	2,253	2,279	2,437	158 (6.9%)
NSAR Billings (million \$)	\$5.548	\$5.530	\$5.616	\$6.436	\$0.820 (14.6%)
NSAR Collections (million \$)	\$5.748	\$5.381	\$5.561	\$6.015	\$0.454 (8.2%)
Equipment Additions (million \$)	\$11.1	\$16.3	\$9.8	\$16.3	\$6.5 (66.3%)
Equipment Deletions (million \$)	\$6.3	\$6.9	\$15.2	\$10.7	-\$4.5 (29.6%)

- Taxation Statistics

<p style="text-align: center;">Tax Returns Filed</p> <p>State Governmental Gross Receipts Tax (monthly)</p> <p>State Water Conservancy Fee (monthly)</p> <p>Federal Fuel Excise Tax Refunds (quarterly)</p> <p>Form 1042 return and 542 1042S Forms for foreign nationals (annual)</p> <p>Form 990T - Unrelated Business Income Tax (annual)</p> <p>Form 990 – UNM Retiree Welfare Benefit Trust (annual)</p> <p>Form 720 – UNM PCORI Fees (annual)</p> <p>Form 8282/8283 – Donee/Donor Recognition (various)</p>
<p style="text-align: center;">Taxes Paid</p> <p>Governmental Gross Receipts Tax paid in FY23 = \$1,826,408</p> <p>Form 1042 Annual Withholding 2022 = \$ 238,081</p> <p>UBIT tax liability FY22 = \$17,537</p>
<p style="text-align: center;">Documents Processed</p> <p>Reviewed and Processed 1,388 transactions to non-resident aliens</p> <p>Reviewed and Processed over 1,300 Foreign scholarship awards</p>

- Treasury Statistics

- Higher interest rates earned on cash balances.
- Interest rates earned on non-cash balances were 0.2% for ICS and 2.4% for commercial paper on April 1, 2023.
- In May 2023, FS negotiated higher interest rates with US Bank, 4.25% for commercial paper and 3.75% for ICS, effective May 5, 2023.
- In Fiscal Year 2023-2024 the increased rates will increase interest revenue earned by over \$1 million, assuming current cash balances.
- Improved the earnings credit rate (ECR) for the checking balance. The ECR offsets the US Bank fees. Improvement in the ECR will allows us to reduce the average daily balance held in

checking, move the funds to interest-bearing accounts, and still pay no (or low) net fees to US Bank.

- The ECR rate was 0.5% of cleared checking balances on July 1, 2022.
- FS negotiated a 1.0% rate, effective May 5, 2023.
- In Fiscal Year 2023-2024 the ECR increase will save \$75k in fees annually, assuming current cash balances.



Human Resources

HR.UNM.EDU



**Assistant
Vice Presidents**
KEVIN STEVENSON
KATHY AGNEW

Mission and Vision

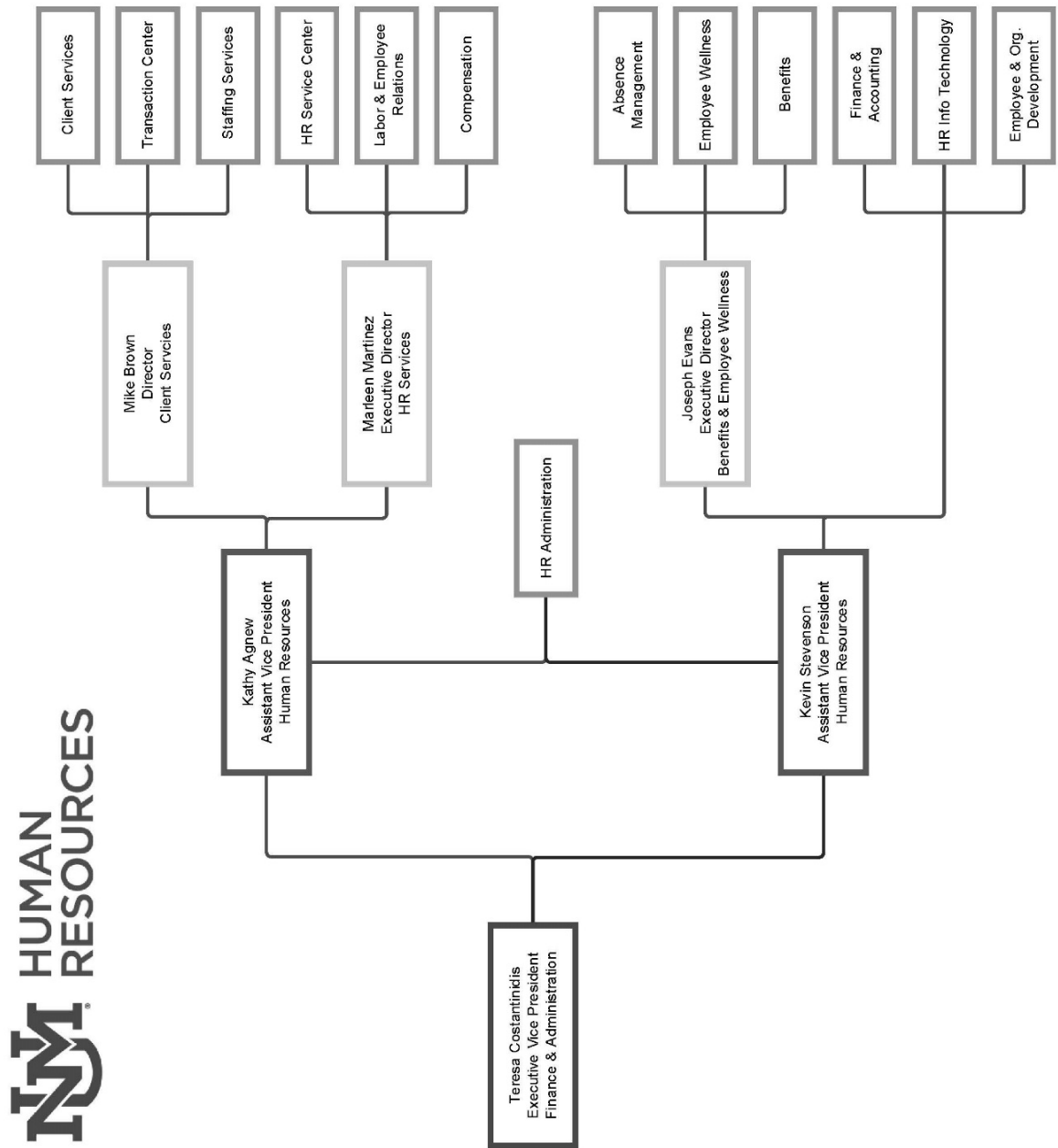
Mission

Deliver exceptional service and resources to make employees' lives better every day.

Vision

Create a culture where our employees are engaged and empowered.

Organizational Chart



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i. EXECUTIVE SUMMARY

The division of Human Resources (HR) is a central administrative unit that reports to the Executive Vice President for Finance and Administration. HR provides a full range of high-quality services, products, tools, and programs to its customers who include university staff, faculty, retirees, dependents, and applicants. As a team, HR develops, implements, interprets, and administers HR policies, procedures, practices, and external regulations.

Human Resources is dedicated to providing exceptional customer service in support of the University's Mission, Vision and Guiding Principles. HR is responsible for a number of functions operating under the following primary areas of oversight:

- Office of the Vice President for Human Resources – oversees the division of HR, represents the division to UNM leadership and the Board of Regents, supports strategic initiatives and projects, creates, develops and manages employee communications and forum groups, administers the university's service award program, and provides centralized administrative support on a range of efforts.
- Benefits & Employee Wellness – administers health benefit insurance plans for eligible populations of the university system, facilitates UNM's retirement program, provides educational and consulting guidance on various wellness aspects around physical, emotional, financial, and occupational wellbeing.
- Client Services – provides consultation services for employees and supervisors regarding policy interpretation and performance management. They process employment transactions, recruit for positions, handle unemployment claims, process background checks as well as work directly with campus departments on compliance and implementation of new systems, processes, and policies.
- HR Business Services – oversees HR's budget and accounting operations, technically supports and implements systems, software, and reporting solutions for UNM employees and applicants of the University. This area also oversees the department who functions as a training and development resource for enhancing employees' and manager's soft skills, teaches users how to operate various systems and functions, and trains on how to comply with certain requirements of UNM.
- HR Services – manages the HR Service Center, a centralized customer support and intake desk that also maintains and manages UNM's central employee personnel files for staff. HR Services is also responsible for classification and compensation analysis and the various staff compensation guidelines offered at UNM, labor and

employee relations matters including investigations, union negotiations and policy editing and creation.

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 budget is utilized to provide strategic guidance, consulting support, and compliance support for the various departments of the University. HR strives to make the most of its budget to offer 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 FY23 totaled \$7.8M. The primary sources of funding for HR are Instructional & General (39%), general institutional services (30%), miscellaneous general (17%), and internal service center funding (5%). Other sources of funding (9%) for HR include transfers, other allocations, and balance forwards. The majority of HR's expenditure budget is comprised of salary & benefit expenses (\$6.6M). Overall expenses for HR did not increase in FY23, with vacancy savings generated via staff turnover offsetting increasing salary costs due to annual compensation increase.

HR Strategic Plan

To continuously realize our vision of delivering exceptional service and resources to make employees' lives better every day, we continue to correlate all projects and initiatives to the goals and strategies outlined in our five-year Strategic Plan (2018-2023). Our goals and strategies are included below, and can be found online at hr.unm.edu/hr-strategic-goals-initiatives.

Goal 1: People

First and foremost, HR is about people. We must enhance the quality and consistency of services and resources we provide to the people who work for UNM and the people that work with HR if we are to succeed in creating a culture of engagement and empowerment for an improved overall experience at UNM.

- Total Rewards: Build upon programs and practices that attract, develop and retain quality employees.
- Improved Service: Cultivate relationships by providing employees and departments with up-to-date and useful information through consistent and exceptional customer service.

Goal 2: Optimization

Optimize the HR Division by increasing internal collaboration, evolving our organization structure, and refining our business processes to allow us to focus less on red tape and more on helping UNM departments and employees get their jobs done more effectively.

- Collaboration, Process and Documentation: Enhance collaboration across HR departments and reduce duplication through the review, refinement, and documentation of internal business processes.

Goal 3: Technology

Employ technology to improve efficiency within HR and to increase employee satisfaction and success across campus.

- HR Technology and Infrastructure: Deploy technical solutions within our sphere of authority to enhance HR department effectiveness.
- Effective Partnering Across Campus: Leverage relationships and expertise with departments across campus to implement and improve enterprise applications, systems, and processes.

Goal 4: Compliance

Embrace HR's role in an effective university-wide compliance program while responding with agility to new challenges and requirements.

- Initiatives: Adopt best practices across the Division to effectively support employees, manage risk, and control cost.
- Mandates: Implement new obligations in a forward-looking manner that promotes an environment of ethics and compliance while balancing efficiency and effectiveness.

ii. SIGNIFICANT ACCOMPLISHMENTS

Below are descriptions of our top five accomplishments. Following those details, we have also listed additional accomplishments which had an impact on University operations.

- UAP 3500 Revisions - Staff Compensation and Pay Practice Enhancement
 - Completed revisions to University Administrative Policies and Procedures (UAP) 3500: Wage and Salary Administration

strengthening the University's commitment to internal equity. Revisions also improve recruitment and retention efforts by supporting the ability to pay staff based on education and related experience.

- Staff Salary Placement and Equity Tool (SPET) – The SPET was designed and developed internally in partnership with UNM IT and in cooperation with a pilot group of key departments. The tool was introduced university-wide in early 2023. The tool supports UAP 3500 revisions by assisting departments in identifying a competitive salary range based on an individual's education and related experience. Currently, salary range equity reviews take place at Level 5. After the pilot period, 10 departments opted into Level 3 review. Full university-wide adoption of Level 3 reviews will occur on January 1, 2024.
- UAP 3245 – Remote Work
 - Policy Creation and Implementation – Developed and implemented UAP 3245: Remote Work and completed revisions to a host of associated policies to codify the COVID-era remote work program.
 - Compliance Monitoring – Internal systems, including Banner, were updated to allow for identification and tracking of remote work agreements and staff work locations to allow for participation tracking and policy compliance monitoring.
- UAP 3215 Revision - Performance Improvements – To address the August 2020 changes to Title IX regulations, which changed the way schools are required to treat sex discrimination complaints, including claims of sexual harassment/sexual misconduct (UAP 2740), HR completed policy revisions focusing on two distinct processes; a new pre-deprivation process for civil rights violations under UAP 2720, 2740 and 3110 and the existing post-deprivation process for non-civil rights violations, including a revision of the Peer Hearing process.
- Benefits and Wellness Enhancements
 - Health Plan Salary Tier Expansion – The salary tiers used to determine UNM's contribution toward medical, dental, basic life and long-term disability premiums had not been updated in over ten years. HR developed a proposal to expand the salary tiers by \$10,000 increments to continue to improve UNM's competitive position with respect to how much employees are required to pay for their coverage. The salary tier expansion was approved and is expected to improve employee satisfaction.

- Mental Health Copay Reduction - Medical plan design was enhanced by implementing \$0 copays for outpatient mental health services across Tier 1 and Tier 2 networks under both the UNM LoboHealth and Presbyterian plans, including virtual visits. This enhancement is intended to assist employees in receiving mental health services by removing financial barriers and expanding the providers employees can access at a \$0 copay.
- QPR Training - QPR stands for Question, Persuade, and Refer — the 3 simple steps anyone can learn to help save a life from suicide. QPR training teaches people how to recognize the warning signs of a suicide crisis and how to question, persuade, and refer someone to help. HR Employee Wellness Health Education Consultants received QPR Gatekeeper Instructor certifications in the late summer of 2022 and began delivering QPR training by department request in the fall 2022. HR Employee Wellness began delivering courses to the broad University community the first Friday of each month in March 2023.
- Key HR Initiatives in Support of UNM 2040: Opportunity Defined

In addition to improvements of compensation and pay practices discussed earlier, the HR Division focused on a series of priorities and initiatives directly in support of UNM 2040 objectives to ensure a stable and high-quality workforce and can share the following accomplishments:

 - HelioCampus Benchmarking: Reduced Administrative Intensity
 - HelioCampus Benchmarking efforts have resulted in the reduction of administrative staffing intensity for both labor spend (from 28% to 26.6%) and FTE (from 45.1% to 42.6%).
 - Hiring and Personnel Action Process Improvements
 - Integrated background checks into the application process removing multiple steps for departments when issuing final offers. This change also enabled the elimination of the criminal conviction disclosure form for applicants further streamlining the process.
 - Created 3 core office Employee Personnel Action Forms (EPAF) for HR consultants and compensation to submit job changes created by the core office such as, reclassifications, career ladders, salary changes, etc.
 - Enhanced internal processes utilizing Smartsheet applications to centralize tracking of HR Analyst

assignments and to allow HR managers to evaluate and act on analyst workload and turnaround time.

- Training Pathways and Toolkits - Modified the ULEAD coursework to encompass a “change management” pathway and incorporated skills practice sessions to allow participants to better familiarize themselves with the learned tools and strategies. Also, rolled out a preliminary Supervisor and Employees Toolkits to provide a resource library for supervisors to access training, forms, and strategies to help them better facilitate their leadership roles.
- Community Planning Support - UNM provided strategic planning support to community partners including the UNM/Veterans Administration partnership, Homeless Coalition and UNM/New Mexico Black Leadership Council. These activities strengthened UNM’s reach into the community and beyond.
- Centralization of Family Medical Leave Act (FMLA) Tracking for Staff in Banner - Phase 2 for centralizing FMLA leave administration for staff included the implementation of the FMLA tracking module in Banner. HR partnered with UNM Payroll to configure the FMLA module in Banner to meet UNM’s FMLA tracking requirements related to concurrent use of other paid leave. Additionally, job aids were created and communicated to timekeepers, HR Agents and supervisors and continued assistance for accurate time reporting was provided by the Absence Management team in HR. The implementation of FMLA tracking in Banner will improve compliance with reporting FMLA use accurately while reducing burden of departments maintaining FMLA tracking logs.
- Employee Engagement Survey - HR contracted with Gallup to develop and deploy a staff employee engagement survey in the spring of 2023. The survey gauged views, attitudes, commitment, trust, and perceptions of UNM utilizing the Gallup Q12 platform. Results were compiled over the summer of 2023, and support for departments in interpreting and acting on the results began in fall of 2023.

iii. FUTURE PLANS

The primary focus for plans and projects for FY24 will be on those which assist the University in accomplishing the goals and objectives of the UNM 2040 Opportunity Defined strategic plan. HR will address the tactics set by the Office of the Executive Vice President for Finance & Administration for completion in

FY24. These tactics directly work toward achieving Objective 1 of Goal 4 of UNM 2040.

- Employee Engagement Survey - Building on the Spring 2023 Engagement Survey administration, support campus leadership and department managers with the action planning process to review and address survey responses in their units. Establish annual survey cadence and develop reports for year-over-year comparisons and trend analysis. Utilize survey responses as catalyst to review, enhance, and modernize staff service awards and other university-wide recognition programs.
- Implement Evolving Compensation and Benefit Models - Implement the next iteration of compensation and benefits enhancements, including further revisions to staff compensation guidelines and increases in employer contributions to health insurance.
 - Continued Implementation and Enhancements of UAP 3500 Processes
 - Implementation of Level 3 Internal Equity Reviews - In support of recent changes to UAP 3500: Wage and Salary Administration, implement internal equity reviews at the College/School/Division Level (defined in Banner as Level 3 organizations). HR will work closely with department stakeholders/management on identifying areas of concern, establishing internal processes, and providing training on the Salary Placement and Equity Tool (SPET) which will be the tool used to determine salary range parameters and identify internal equity issues.
 - SPET Enhancements - SPET enhancements will be implemented to better support department users. Such enhancements address users' feedback and will further streamline the existing tool's capabilities, allowing for more precise recommendations, aging of data, and a more robust reporting tool for end users.
 - Enhanced Health Care Premium Contributions - Continue to identify possibly funding to make additional shifts in the salary tiers used to determine UNM's contribution toward employee health premiums to continue to improve UNM's competitive position in the market with respect to total rewards.
 - Evaluate Opportunities for Sign-on Bonuses - Evaluate opportunities that allow added flexibility in attracting, recognizing, and retaining staff employees with options

for one-time payments vs. recurring increases. Evaluation and recommendations will consider state requirements for public sector employees and best practices among peer institutions and local competitors.

- Medical Plan Administrative Services Request for Proposal (RFP) - Issue RFP for the administrative services provided to UNM's medical plan including the plans for our faculty, staff, pre-65 retirees, graduate assistants, and house staff officer. This RFP will be completed due to procurement requirements and is an opportunity to look at the services and solutions currently in the market to meet UNM's needs for administrative services and point solutions intended to improve health outcomes and manage health care costs. The implementation of chosen vendors will be completed by July 1, 2024.
- Evaluate Strategies to Enhance UNM's Overall Benefit Offerings - Research and evaluate opportunities to enhance UNM's benefit package that will continue to improve the employee experience while working at UNM and make recommendations for FY25 implementation. This will include opportunities for voluntary benefit plans, financial wellness, career development, and retirement savings.
- Enhance Supervisor Development and Support - Building on Engagement Survey responses, develop and implement a comprehensive set of training, development, and support resources for managers and supervisors, including revisions to current required supervisor training and enhancement of just-in-time support and resources
- HelioCampus Staffing Intensity
 - Identify and implement two process improvement initiatives for administrative areas with higher-than-benchmark staffing intensity levels. The goal will be to reduce the average time to hire a vacant position and reduction of average time candidates are in "recommended for hire" status.
 - Evaluate and possibly implement the UNM enterprise Customer Relations Management (CRM) platform to improve communications and services provided HR's Benefits and Employee Wellness department. The intent of implementing a CRM will provide UNM Benefits & Employee Wellness improved efficiencies in providing customer service to the UNM community while also providing opportunities for efficiently

communicating in real time using text messaging and other formats with appropriate employee populations.

- Key Federal Compliance Projects
 - Fair Labor Standards Act (FLSA) - The U.S. Department of Labor (DOL) proposed a new rule that would change the salary threshold for exempt employees under the FLSA. The new rule proposes substantial increases in raising the FLSA annual salary-level threshold from \$35,568 to \$55,068. DOL is also proposing automatic hikes every three years to the overtime threshold. HR will stay abreast of DOL communications and, if approved, evaluate and implement changes necessary to comply with FLSA changes.
 - Affirmative Action Plan - The University has received notice of an Office of Federal Contractor Compliance Program (OFCCP) Audit of our Affirmative Action Plan (AAP). HR is working closely with the external consulting firm that generates the AAP to prepare proactively in assessing identified disparities and to mitigate associated risks. The scope of this initiative will be dependent on the specific information requested by OFCCP in which the University is still pending formal notice of such request.
 - Conflict of Interest/Conflict of Commitment - Following on recommendations from the President's Ethics Task Force, HR is collaborating with partners across campus on the development and implementation of policy and procedures to enable the creation of a campus-wide approach for managing conflict of interest and conflict of commitment.
 - Consolidated Appropriations Act - Implement group health plan transparency provisions as required by the Consolidated Appropriations Act of 2021. This will include providing the attestation to Centers for Medicare & Medicaid Services that UNM's third-party administrators' provider contracts do not contain gag clauses and obtaining necessary back-up documentation from third-party administrators. Additionally, HR will make any necessary additions/adjustments to public access to machine readable files and cost reporting as required by any additional regulatory guidance.
 - Secure Act - Assess and implement Secure Act and Secure Act 2.0 provisions as they relate to UNM's Voluntary Retirement Plans. This will include drafting or reviewing any changes to UNM's Voluntary Retirement Plan documents and amendments

as needed to any agreements with third-party vendors for purposes of administering UNM's plan.

- Family Medical Leave Act - Update UAP 3440 FMLA to improve compliance and align with recently implemented centralized processes. This will include drafting policy revisions to identify supervisor responsibilities and employee rights, updating references within the policy to FMLA guides on HR website, and ensure policy aligns with regulatory requirements.

iv. APPENDIX

APPENDIX A: EMPLOYEE & ORGANIZATIONAL TRAINING

Staff Development Courses*	FY23
Total number of courses	35
Total number of participants	1046
Leader Specific Courses	FY23
Total Ulead Participants	49
Total Career Pathways Participants	20
Total HSC Mentorship Participants	24
Department-Requested Services**	FY23
Total sessions provided	67
Total Strategic Planning Clients	17

*Staff Development includes Staff Success Days, Open Enrollment courses, and Hungry Minds Cafe sessions.

**Department-Requested Services include consultation, trainings, and workshops tailored to the needs of the department.

Consultation Client List FY23

- Cancer Center Research Administration
- Center for Teaching and Learning
- CNM Student Honor Society
- Community Health
- Community Health Workers Initiative
- College of Population Health
- Dean of Students Office
- Department of Anesthesiology
- Department of Family and Community Medicine
- Department of Pediatrics
- Department of Obstetrics and Gynecology
- Dental Medicine
- El Centro College Assistance Migrant Program
- Emergency Medicine

- Family and Community Medicine
- Financial Aid Office
- Global Education Office
- Graduate Medicine Education
- Health Sciences Center Office for Diversity, Equity & Inclusion
- Health Sciences Center Finance & Administration
- Health Sciences Center Marketing and Communications
- Health Sciences Center Mentorship
- Health Sciences Center Shared Services
- KUNM Radio Station
- Molecular Genetics and Microbiology
- Neurology
- Division of Complex Family Planning
- Office for Community Health
- Office of Sponsored Projects
- Office of University Council
- Parking and Transportation Services
- Project ECHO
- School of Medicine Mentorship
- Staff Council
- Student Activities Center
- United Way Group
- UNM Bookstore
- UNM Children's Campus
- UNM Comprehensive Cancer Center
- UNM Gallup Campus
- UNM Gallup Board

Strategic Planning Clients:

- College of Fine Arts
- College of Music
- Center for Teaching and Learning
- Executive Vice President for Finance and Administration Retreat
- Family and Community Medicine Retreat
- Gallup Campus
- Honors College
- Institute of Design and Innovation
- Los Alamos Campus
- Neurology
- New Mexico Veteran's Alliance
- New Mexico Homeless Coalition
- Student Health and Counseling
- School of Medicine Department Administration
- School of Medicine Leadership

- UNM 2040
- UNM Valencia

APPENDIX B: ULEAD AND CAREER PATHWAYS STATISTICS

ULead Fall 2022 Cohort Size = 25

Learning Pathways and attendee total:

Change Management = 2

Managing Relationships in the workplace = 11

Project Management = 12

Participating Departments:

- Center for Teaching and Learning
- Chemistry and Chemical Biology
- Enrollment Management
- Financial Aid
- Facilities Management
- Academic Technologies
- Internal Medicine
- Neurology
- Office of Assessment & Academic Program Review
- Pediatric Hematology and Oncology
- Pediatric Neurology
- Scholarship and Financial Aid Office Administration
- Student Health and Counseling
- School of Medicine
- School of Medicine Dean's Office
- Student Activities Center
- University Libraries, Cataloging
- UNM Center for Development Disability
- UNM Health Sciences Marketing
- Community Health Worker Initiatives
- Facilities Management - Engineering & Energy Services
- Information Security & Privacy
- Office of Compliance, Ethics and Equal Opportunity
- Office of Institutional Analytics

ULead Spring 2023 Cohort Size = 24

Learning Pathways and attendee total:

Change Management = 4

Managing Relationships in the workplace = 8

Project Management = 12

Participating Departments:

- Accessibility Resource Center
- Architecture
- Capital & Space Strategies
- Center for Teaching and Learning
- Clinical Research Trials Center
- College of Population Health
- Compliance, Ethics, and Equal Opportunity
- Cradle to Career Policy Institute
- El Centro de la Raza
- Facilities Management
- Faculty Research Development Office
- Division of General Internal Medicine
- Health Sciences Center Marketing & Communication
- KUNM Radio Station
- Neurology
- Office of Admissions
- Office of Medical Investigator
- Patient & Family Support Services, UNM Comprehensive Cancer Center
- Project ECHO Education
- Recreational Services
- Residence Life & Student Housing
- Revenue Cycle
- School of Medicine Center for Development/Disability
- UNM Children's Campus

Career Pathways Participant Total: 20

Selected Pathways:

Communicating Effectively = 2

Custom Leadership Journey = 5

Diversity & Inclusion = 1

Leadership & Development = 10

Personal Productivity = 2

Participating Departments:

- Anderson School of Management
- Center for Teaching and Learning
- Community Health Worker Initiatives

- Curriculum Support Center UNM School of Medicine
- Emergency Medicine
- Enrollment Management
- Family Community Medicine
- Global Grants and Initiatives/Project ECHO
- Los Alamos Branch
- Office of Clinical Trials and Data Management
- Office of Research Integrity & Compliance
- Office of the Medical Investigator
- Pathology
- Pediatrics Occupational Therapy
- Project ECHO
- Residence life & Student Housing
- Student Health and Counseling
- Taos Branch
- UNM Student Health & Counseling
- UNM Student Housing

APPENDIX C: OTHER TRAININGS

Annual Mandatory Training	CY22
Basic Annual Safety Training	87%
Intersections: Preventing Discrimination & Harassment	86%
Active Shooter on Campus: Run, Hide, Fight	88%

APPENDIX D: TECHNICAL TRAINING AND SPECIAL PROJECTS

Technical Training and Projects	FY23
Technical Projects	6
Spanish Translation Services	3
Total Performance Evaluation Process (PEP) Information Session Participants	44

Special Projects FY23

- Staff Success Days Professional Development Week: Sept 19-23, 2022
- Faculty Search Committee Training Video
- Removing Financial Fitness workshops from Learning Central
- Gallup Engagement Survey

APPENDIX E: CAMPUS ENGAGEMENT

Campus Engagement	FY23
Gallup Engagement Survey Responses	2690
New Employee Experience Participants	811
PEP Completion Rate	92%

APPENDIX F: EDUCATIONAL BENEFITS

Tuition Remission Statistics

Department	Academic Year 19-20	Academic Year 20-21	Academic Year 21-22	Academic Year 22-23
Continuing Education*	\$854,080	\$765,591	\$1,101,117	\$1,406,220
Continuing Med Education	\$90,423	\$40,346	\$43,500	\$63,639
Miscellaneous**	\$140,402	\$64,674	\$96,858	\$87,855
New Mexico State University	\$132,265	\$151,841	\$126,066	\$139,070
Recreational Services WOW Program	\$46,377	\$10,035	\$58,692	\$106,611
University of New Mexico**	\$3,841,411	\$3,831,583	\$4,137,029	\$3,926,941
Total	\$5,104,959	\$4,864,070	\$5,563,263,46	\$5,739,046

*Continuing Education includes all non-credit courses from colleges such as Anderson School of Management, College of Education, etc.

**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 19-20	Academic Year 21-22	Academic Year 21-22	Academic Year 22-23
Total	\$1,138,109	\$1,318,015	\$1,086,197	\$995,329

APPENDIX G: HEALTH BENEFITS

Employee Health Plan Enrollees – Active Employees

	FY20			FY20			FY22			FY23		
	Pres.	Lobo Health	Total	Pres.	Lobo Health	Total	Pres.	Lobo Health	Total	Pres.	Lobo Health	Total
Single	490	2,445	2,935	480	2,405	2,885	511	2,318	2,829	570	2,413	2,983
Double	196	684	880	194	709	903	214	752	966	218	764	982
Family	230	994	1,224	217	982	1,199	237	986	1,223	236	995	1,231
Employee + Child(ren)	116	484	600	112	497	609	112	481	597	122	489	611
Total	1,032	4,607	5,639	1,003	4,593	5,596	1,078	4,537	5,615	1,146	4,661	5,807

Benefits Enrolled – Retirees Under 65

	FY20			FY21			FY22			FY23		
	Pres.	Lobo Health	Total	Pres.	Lobo Health	Total	Pres.	Lobo Health	Total	Pres.	Lobo Health	Total
Single	98	266	364	88	272	360	84	254	338	74	235	309
Double	22	76	98	24	74	98	21	54	75	17	48	65
Family	8	11	19	6	10	16	3	14	17	3	15	18
Employee + Child(ren)	5	8	13	9	6	15	8	14	22	5	5	10
Total	133	361	494	127	362	489	114	336	452	99	303	402

Benefits Enrolled – Retirees Over 65

	FY20				FY21				FY22				FY23			
	Lovelace	Pres.	AARP	Total	Lovelace	Pres.	AARP	Total	Medicare Advant.	Pres.	AARP Medicare Supp.	Total	Medicare Advant.	Pres.	AARP Medicare Supp.	Total
Single	385	539	437	1,361	408	546	462	1,416	743	543	482	1,768	650	533	495	1,678
Double	171	256	250	677	162	252	266	680	268	245	291	804	280	237	302	819
Family	1	0	0	1	1	0	0	1	2	0	0	2	2	0	0	2
Total:	557	795	687	2,039	557	798	728	2,097	1,013	788	773	2,574	932	770	797	2,499

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

Employee Type	FY19		FY20		FY21		FY22	
	Total	Avg. Age	Total	Avg. Age	Total	Avg. Age	Total	Avg. Age
Faculty	2,347	50.33	2,366	50.32	2,389	49.98	2,349	50.20
Staff	4,896	45.38	4,918	45.07	4,889	44.76	4,977	44.51
All Employees	7,243	47.9	7,284	47.7	7,278	47.4	7,326	47.36

APPENDIX H: COMPENSATION

Type	FY20	FY21	FY22	FY23
Career Ladder (CRLDR)	26	10	23	22
Counter Offer (CTOFR)	15	7	9	9
In-Range Higher Level Duties (INRNG)	34	31	39	38
In-Range Same or Lower Level Duties (INRGP)	11	11	5	1
Market-based PCLASS Adjustment (PCLAD)	299	142	306	45
Reclassification (RECLS)	190	197	273	255
Retention Offer (RTOFR)	71	79	125	134
Staff <u>Only-Internal</u> Equity Adjustment (IEQTY)	231	185	691	551
Temp Salary In-Range Adjustment (TPSAL)	89	118	84	206

APPENDIX I: DEMOGRAPHICS

Total Staff by Gender

Gender	FY20	FY21	FY22	FY23
Female	3,176	3,162	3,230	3,373
Male	1,741	1,726	1,745	1,807
Not Reported	1	1	2	5
Total	4,918	4,889	4,977	5,185

Total Staff by Age Range

Age Range	FY20	FY21	FY22	FY23
<=30	679	666	739	842
31-40	1,198	1,223	1,237	1,298
41-50	1,185	1,207	1,197	1,231
51-60	1,210	1,182	1,184	1,153
61-70	605	577	579	616
>70	41	34	41	45
Total	4,918	4,889	4,977	5,185

Total Staff by Ethnicity

Ethnicity	FY20	FY21	FY22	FY23
American Indian	255	247	244	260
Asian	109	126	142	151
Black or African American	88	96	102	88
Hispanic	2,097	2,104	2,174	2,300
Native Hawaiian	6	8	4	6
Non-Resident Alien	63	66	69	81
Race/Ethnicity Unknown	110	105	104	104
Two or More Races	89	96	105	104
White	2,101	2,041	2,033	2,091
Total	4,918	4,889	4,977	5,185

APPENDIX J: STAFF EMPLOYMENT

Turnover

Type	FY20		FY21		FY22		FY23	
Voluntary								
Resigned	493	63.9%	439	60.9%	681	72.8%	654	75.4%
Retired	150	19.5%	174	24.1%	129	13.8%	89	10.3%
Involuntary								
Released*	48	6.2%	38	5.3%	42	4.5%	42	4.8%
Relieved**	52	6.7%	27	3.7%	50	5.3%	56	6.5%
Layoff	10	1.3%	25	3.5%	10	1.1%	8	0.9%
Discharged	9	1.2%	6	0.8%	4	0.4%	6	0.7%
Deceased	9	1.2%	12	1.7%	13	1.4%	10	1.2%
Total	771		721		936		867	
Annual Rate***		15.7%		14.7%		18.7%		16.7%

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

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

***Percentage of Turnover in relation to total employees in Demographic tables.3

Total Staff Hires

Type	FY20	FY21	FY22	FY23
Competitive Hires	1,133	1,051	1,610	1,558
Alternative Appointment Hires	45	51	25	37
Total Regular Hires	1,178	1,102	1,635	1,595
On-Call Hires	52	46	207	104
Temporary Hires	12	19	35	16
Total of All Hires	1,242	1,167	1,877	1,715

UNM Temps Placements

Location	FY20	FY21	FY22	FY23
Main/Branch	80	42	82	22
HSC	15	12	36	7
Total	95	54	118	29



INFORMATION TECHNOLOGIES

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DUANE ARRUTI

Mission and Vision

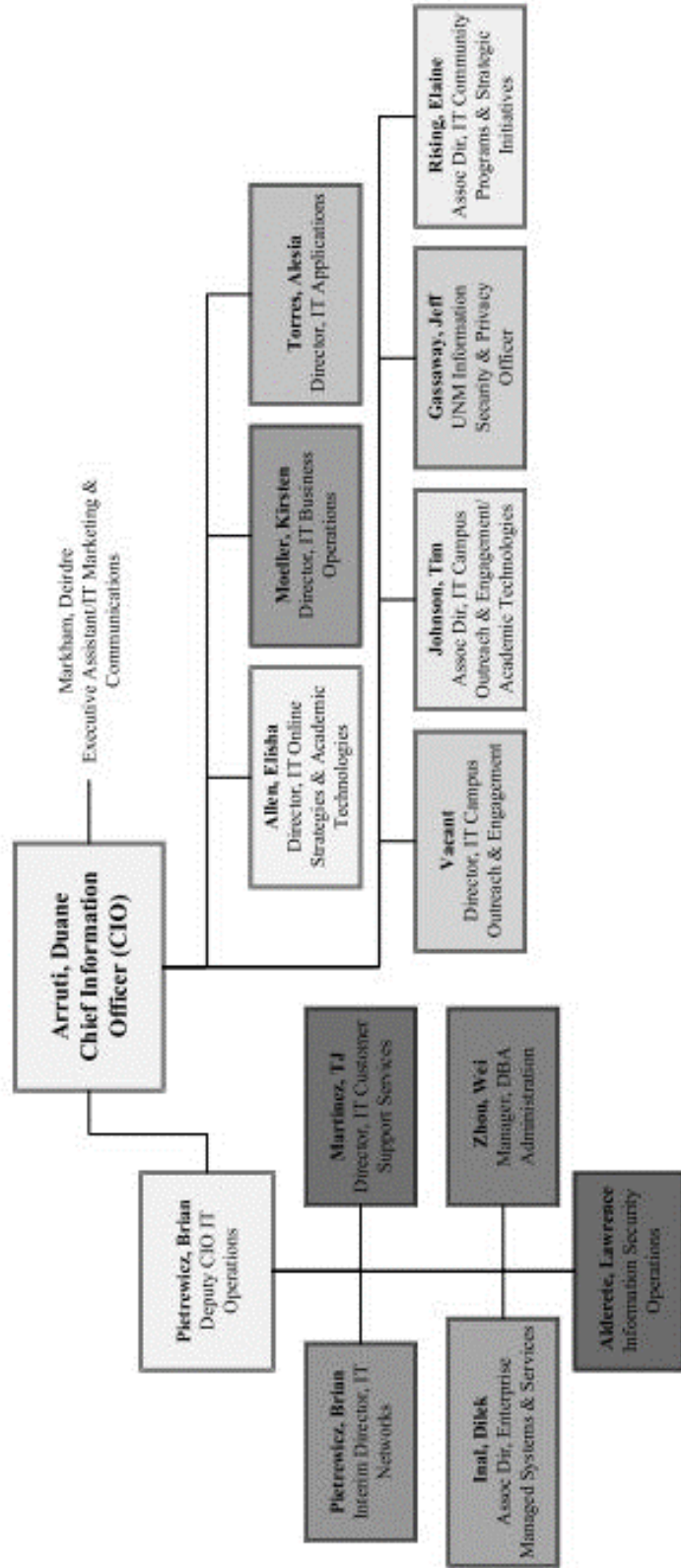
Mission

UNM Information Technologies (IT) provides effective and efficient information technologies and services to advance UNM's educational, research and service missions.

Vision

UNM IT will partner strategically with the community of New Mexico's Flagship University to enable success without boundaries through innovative technologies and services aligned with its educational, research and service missions.

Organizational Chart



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i. EXECUTIVE SUMMARY

It is hard to believe it has been more than 6 years since we began the IT effectiveness and efficiency effort as a UNM IT team partnering with UNM's colleges, schools, branches, and administrative areas. In that time, we have had 100% turnover in the leadership of each of these areas and our shared services program has not only persisted but has continued to expand and evolve. In FY 2023 the College of Education and Human Sciences, Continuing Education, Honors College, University College, and UNM Online all joined the Campus Outreach model and are now supported by an IT Officer, as is UNM's Valencia Branch Campus. In addition, a Memo of Agreement was signed with UNM Financial Services, UNM Human Resources, and UNM Information Technologies to build a foundation for stronger integration and collaboration amongst EVPFA divisions as it relates to information technology. The improved coordination of our teamwork and communication, progress on standards with workstations and academic spaces, and increased awareness, accessibility, and utilization of enterprise services, standards, and security protocols are among some of the major highlights to date.

Cybersecurity was a critical topic for FY 2023 and will remain so in the foreseeable future. Following a transformational year of foundational campus-wide security improvements that were accomplished in 2021, UNM IT has continued to maintain our focus on continuous improvement of our security posture and build on the momentum year after year. UNM IT has also continued to play a lead role with the Consortium of Higher Education Computing/Communication Services (CHECS) and the Higher Education Department (HED) to develop proposals and execute plans for statewide improvements in cyber security.

UNM IT is committed to supporting the UNM 2040 multi-year plan to build the future of our flagship institution and our state. UNM IT submitted a comprehensive list of more than 30 proposed and existing projects and initiatives for consideration as 2040 Strategic Planning tactics, spanning all 5 UNM 2040 strategic goals. Three of these tactics were selected for inclusion in the Executive Vice President for Finance and Administration's highlighted initiatives for 2022/23.

In alignment with the UNM 2040 goal of One University, one of these major tactics was the in-depth exploration of a consolidated directory. We embarked on a major, foundational initiative with our partners at UNM Health and Health Sciences to address the barriers to system access and collaboration created by multiple NetIDs on campus. The resulting proposal to create a single

consolidated directory was approved unanimously by UNM's executive leadership, and additional planning and execution are planned for FY 2024.

FY 2023 was a challenging yet rewarding year for UNM IT, with incredible accomplishments through strong partnership with our campus community. We look forward to continuing to partner with UNM IT's technology governance and advisory structure for communication, planning and alignment as we move forward.

- Budget Summary

UNM IT's operating budget for FY 2023 totaled \$36.6M. The primary sources of funding for UNM IT include sales and service revenue (36%), I&G (36%), and student technology fees (12%). Other sources of funding include banner tax, grant funding, and one-time annual allocations of equipment/building renewal and replacement dollars. The majority of UNM IT's expenditure budget includes personnel costs (\$22.4M), annual software licensing fees (\$6.6M), hardware maintenance, and cost of goods sold (\$4.4M) associated with resale of UNM IT services and equipment. Licensing obligations continue to increase each year, as does the need for technology refresh. To address these fiscal challenges, UNM IT is working with campus leadership to consider a new funding model and continues to look for operating and capital funding sources to fund maintenance, renewal costs, and new infrastructure. UNM IT was successful in working with executive leadership and the legislature to secure almost \$10.7M in funding to address a range of critical renewal and refresh initiatives ranging from computer labs, classrooms, alarms, and network infrastructure. This funding included General Obligation Bond (Bond C) that was approved by the voters in Fall 2020, of which UNM IT has 3 projects totaling \$9.2M, which are currently in process. Additionally, through several collaborative efforts with the Consortium of Higher Education Computer/Communications Systems (CHECS) organization and New Mexico Higher Education Department (HED), UNM IT played a key role in obtaining Governor's Emergency Education Relief (GEER) I/II funding and a legislative appropriation through HED for higher education institutions in support of various statewide initiatives (\$4.7M). For FY 2023, funding of \$5M requested through the Public Education Department (PED), has been allocated for the Statewide Education Network. This funding was also a result of a collaborative proposal of higher education institutions and will build off the work currently being completed at UNM Gallup (funded

by GEER II) to stand up additional network aggregation sites throughout New Mexico. For FY 2024, funding of \$1.7M, has been allocated to CHECS for cybersecurity initiatives. UNM IT received \$230K of this funding for the purpose of performing mitigation services, risk assessments, penetration testing, and scanning on its information technology network and server systems.

ii. **SIGNIFICANT ACCOMPLISHMENTS**

- Updates to University Policies 2500 and 2520:
 - Helped clarify and modernize responsibilities of system users and system administrators.
- Updates to UNM's Compliance Program with University Process and Compliance Owners for:
 - Gramm-Leach-Bliley-Act (GLBA), to reflect changes to the updated GLBA safeguards rule; and Payment Card Industry (PCI), to reflect improved management oversight and structure for Merchant IDs.
- National Institute of Standards and Technology (NIST) 800 171 Risk Assessment of all Information Systems with Student Educational Records:
 - UNM IT and the UNM Office of Compliance contracted with Clifton, Larson, Allen, LLC., to complete the first risk assessment of systems holding student educational records protected under the Family Educational Rights and Privacy Act (FERPA) and the Graham, Leach, Bliley Act (GLBA). The Federal Government has begun requiring compliance with the NIST standard in order to continue UNM's eligibility to receive student financial aid.
- Health Insurance Portability and Accountability Act (HIPAA) Risk Assessment for Human Resources Benefits Data, Student Health and Counseling (SHAC), and Early Childhood Services Center (ECSC):
 - UNM IT, the UNM HIPAA Privacy Office, and the UNM Office of Compliance contracted with Clifton, Larson, Allen, LLC., to complete the annual HIPAA risk assessment for each business unit mentioned above. Each received a very high score for compliance maturity, as reported to the Regents' Audit and Compliance committee in February 2023.
- Effective New Safeguards:
 - With colleagues involved in security from UNM Health and Health Sciences (HHS), UNM IT deployed new safeguards to reduce risks to IT systems and information, resulting in \$630K savings on UNM's cyber-insurance policy.
- New Funding Development:

- Collaborated on an \$8M legislative proposal for collaborative NM Higher Education information security initiatives, of which \$3M was approved in 2023 House Bill (HB) 2 for FY2024. The funds are being administered by New Mexico Department of IT (DoIT) and the plans for distribution have not been finalized.
- IT Shared Service Initiative/ Workforce Recruitment and Retention:
 - Established a consistent formal approach to recruiting and retaining UNM IT employees, for both staff and student employees, and applied the approach across all UNM IT areas. In Fall 2021, UNM IT started utilizing HR's Salary Placement and Equity Tool (SPET) process for addressing pay inequities, pay compression, and to bring employees closer to midpoint/market value within IT job classifications. In collaboration with UNM Compensation, UNM IT conducted a comprehensive review of multiple IT job classifications (grade 16 and above) and addressed pay issues through the FY2023 Mass Salary Update (MSU) process. UNM IT also implemented an updated pay wage scale for student employees effective, October 2022, to align student employees' wages with market.
- IT Building Modernization and Space Updates:
 - In an effort to facilitate collaboration and improve employee working spaces, IT Building 153 underwent two significant restroom remodels that were completed in early 2023.
- State-wide Higher Education Cybersecurity Initiatives:
 - UNM played a leadership role with the Consortium of Higher Education Computer/Communications Systems (CHECS) collaborative organization in the development of a comprehensive proposal HED funding in support of cybersecurity initiatives totaling \$1,700,000. These funds were distributed to various institutions within the State of New Mexico in support of various cybersecurity spending priorities. UNM received \$230K of this funding for performing mitigation services, risk assessments, penetration testing, and scanning on its information technology network and server systems.
- State-wide Higher Education Technology Collaboration Award:
 - \$2,315,204 which was distributed by the University of New Mexico acting as fiscal agent for the award to 30 institutions within the State of New Mexico in support of various spending priorities as identified in the original CHECS GEER proposal. The grant ended 9/30/22, with closeout activities taking place in 2023.
- LoboScore:
 - A new software (Remark OMR) was deployed in Spring 2022 and has been in production for two fiscal years. Remark OMR

has substantially reduced the time needed to score exams, while increasing the quality of generated reports.

- Course and Faculty Evaluation:
 - Regular and uninterrupted Course and Faculty Evaluation service was delivered to the University and its branch campuses. Response rates have remained consistent despite the demise of the Blackboard learning management system and the ongoing changes throughout UNM brought on by the Covid-19 pandemic.
- Course Corrections:
 - Gathered course corrections from 76 participating departments across all campuses each semester of FY2023. Gathered feedback for 89,964 (or 46.78%) of enrollments.
- Qualtrics:
 - Qualtrics entered its third billing year pending renewal in 2024; the team developed new training methodologies and procedures and co-presented Qualtrics 101 at Tech Days to high acclaim. UNM's Qualtrics enterprise license was opened to all UNM persons with NETID's. This marked the last major milestone for mass adoption campus wide. Qualtrics enterprise service grew through support of marketing initiatives and educational demonstrations, provided steady course evaluation services, and refined the LoboScore process through process improvements. Qualtrics has left the implementation phase and is now in a state of maintenance and continual improvement.
- Esurvey Election Service:
 - Provided administrative support and anonymous/de-identified election results over an average duration of two weeks for eligible elections. These elections are considerable commitments for multiple members of the team, requiring extensive quality assurance and customer engagement.
- Athletic Grant in Aid Contract Automation:
 - Allowed Student Financial Aid Office (SFAO) staff to enter a student ID into a OnBase/Unity form that will automatically populate a letter with Banner data and securely email it to the student. The student would then be able to sign the document, which would be automatically returned to the SFAO with a courtesy copy to the Athletics department.
- Science, Technology, Engineering and Mathematics (STEM) Women and Minority Workloads:
 - Determined inequities in compensation and workload credits for underrepresented minorities and women.
- Campus Map Renovation Discovery:
 - Modernized UNM maps to provide visitors, students, staff and

faculty with a captivating view of the UNM campuses, with future possibility of integrated virtual tours.

- Student Registration (College Scheduler):
 - Improved student satisfaction with the registration experience by facilitating students' ability to build class schedules that accommodate personal obligations.
- Bookstore Integration with Banner Registration & Banner Update Upon Student Signature of Academic Plan:
 - Enhanced the student experience.
- Student Affairs Offices:
 - Implemented Lobo Check-In.
- Banner 9 Faculty Self-Service:
 - Facilitated attendance tracking, final and mid-term grades, incompletes, electronic gradebook, student academic review.
- UNM Policy Office:
 - Automated and improved policy review and approval process.
- TargetX/Salesforce:
 - Implemented TargetX/Salesforce for Recruit in partnership with Anderson Graduate School of Management, and onboarded three branch campuses including Banner integrations.
- Single Identity (Logon Account) for all UNM End Users:
 - UNM and HHS utilize separate directories for account authentication, resulting in the need for users to have multiple accounts and an understanding of which accounts to use for which services. UNM and HHS hired a consultant to propose a solution to resolve this problem. The recommendation was to migrate all users into the UNM directory. This recommendation was approved by the executive governance council and additional planning, including a request for proposal (RFP), are expected to continue in FY 2024.
- Gallup Co-Location for the Statewide Education Network (SEN):
 - In support of the New Mexico Statewide Education Network's (SEN) goals to implement a state-wide, high-quality, and resilient broadband network and to provide connectivity to education and childcare organizations, UNM was awarded GEER funding totaling \$650,000 to establish a network aggregation site at UNM Gallup. The colocation facility at the UNM Gallup branch campus location will serve as a model to help improve broadband services statewide and help drive competition amongst providers in remote areas of the state to improve the quality of service and reduce costs for New Mexico residents. The colocation facility will also house a statewide network for K-12 schools in New Mexico, and is a pilot project that will ultimately be implemented in remote areas throughout the

state. The Gallup site was substantially completed in FY 2023 with final generator work to be completed in FY 2024.

- Future of Telecom Services for the Enterprise:
 - UNM's core telecom services have some significant components that will be going end of life in 2027, causing significant changes to the way telecom services are delivered. Planning has been completed to create a road map to 2027, and one of the core components of telecom services, voicemail, has already been replaced.
- Major Infrastructure Upgrades and Implementations:
 - UNM IT implemented hundreds of major infrastructure upgrades including but not limited to: Splunk logging and monitoring, endpoint detection and response, virtual infrastructure, load balancing, storage, Domain Name System (DNS) and DNS security, firewalls and routers, infrastructure as code, and workstation automation. These upgrades significantly improved the security, reliability, and performance of the underlying infrastructure that supports all IT services.
- Perimeter Security Posture:
 - UNM IT worked with area units to dramatically improve the security posture by limiting the number of external devices accessible on the Internet. UNM IT implemented firewall rule sets that block all Internet traffic to desktop networks campus wide, reducing the number of devices accessible on the Internet by more than 40%. All devices that should not be visible on the Internet will be blocked by the end of CY 2024.
- Organizational Restructure:
 - A second Associate Director was brought on to help with the management of the Campus IT Officers and responsibilities were divided between Academic IT and the Service Centers. This new structure allows for quicker response to campus IT issues and concerns.
- Campus Outreach Initiatives:
 - Five new work teams were created to focus on areas of concern for the UNM Campus. Campus IT teams will work with subject matter experts from UNM IT to deliver services in a consistent way in the following areas:
 - Endpoint Lifecycle (the management of workstations from Procurement to Surplus)
 - Workforce (retention of student and staff employees)
 - Workload/Tools (a common ticketing and project management system for all IT)
 - CMDB (a configuration management database to track all IT assets, both hardware and software)

- Academic Learning Environments (to develop standards for classrooms and conference rooms across the UNM Campus)
- Team Integration:
 - Enhanced focus on cross-training between campus IT areas, and communications between IT Officers and their technical staff, has allowed for better back-up opportunities and easier staffing coverage. For example, Arts & Sciences leaned heavily on other IT areas to image 600 new workstations, which significantly cut down on faculty and staff workstation deployment time.
- UNM IT and the New Mexico Black Leadership Council Partnership:
 - UNM IT envisioned and co-planned a day-long convening with the New Mexico Black Leadership Council (NMBLC), the UNM College of Fine Arts Dean, the U.S. Department of Education Broadband Advisor, and our UNM regional/national partners from Adobe, Inc. to develop new and expand existing digital literacy and inclusion initiatives. Following the Convening UNM IT collaborated with Adobe and the NMBLC to offer Adobe Creative Suite train-the-trainer sessions.
- New Mexico Black Leadership Council and Explora Sign Letters of Agreement (LOA) with UNM IT:
 - The LOAs outlined proposed planning retreats for Fall 2023, with each organization to identify our shared aspirations for the next ten years. The LOA with Explora also continued the IT Ambassador program where a UNM IT student employee serves as a science, technology, engineering, arts and math (STEAM) mentor for high school students coordinated by Explora.
- UNM IT Panel Presentation at the New Mexico Technology in Education (NMTIE) Conference:
 - UNM IT led a panel discussion at NMTIE in the Fall 2022, regarding “How do we connect the students and families to the reality that they can go to college?” and won the best presentation award.
- Adobe Creative Commons Grand Opening:
 - UNM IT and UNM Libraries hosted the UNM community and our community partners; NMBLC, Explora, and Adobe, Inc., at the Adobe Creative Commons Grand Opening in Fall 2022. The event showcased the new collaboration space complete with two recording booths, private collaboration spaces, and state-of-the-art technology and equipment. Adobe staff also held concurrent train-the-trainer workshops for our partners.
- NM State Office of Broadband Accessibility (OBAB) Digital Equity and Inclusion Workgroup:
 - In the Fall 2022, UNM IT joined the workgroup that was

legislated as part of the OBAE. UNM IT contributed to the development of the federal proposal that includes digital literacy training and is taking the lead in the state with our train-the-trainer pilot programs.

- UNM Office of the CIO and CNM App Contest:
 - UNM and CNM jointly hosted the annual, sponsor-funded App Contest, awarding a total of \$8,500 in prizes to UNM and CNM students who produced the best apps. UNM IT also helped facilitate an Explora-sponsored and hosted app contest for middle and high school students.
- UNM Office of the CIO Tech Days:
 - For the first time since COVID-19, the Office of the CIO hosted an in-person Tech Days at the UNM Student Union Building, after two years of allowing virtual-only presentations. Tech Days is completely sponsor-funded, and provides an in-depth engagement with campus technology and software for over 20 institutions, 83 UNM departments, and almost 400 individual attendees.

iii. FUTURE PLANS

- Shared, Modernized Account Security Standard to Replace UNM's Legacy Password Standard:
 - Collaborate with UNM Health and Health Sciences (UNM HHS) to better guide the UNM community on the appropriate safeguards for the accounts community members use to access and manage UNM data and UNM systems.
- GLBA Shared Compliance Activities:
 - Continue to integrate into business-as-usual activities in applicable areas, dealing with student and student financial aid information.
- Annual/Periodic Risk Assessments by Outside Vendors:
 - UNM IT will facilitate the completion of the 2023 risk assessments for student educational records and for the business units covered by Regents' Policy 3.8 (HIPAA) as prescribed by the HIPAA Privacy Office.
- Process Improvements for Shared PCI Activities:
 - Perform updates covering required annual trainings, annual policy and procedure acknowledgements, and required annual Self-Assessment Questionnaires (SAQs) and Attestations of Compliance (AoCs) documentation.
- Development of a UNM Information Privacy Policy and Supporting Program:
 - Help ensure that privacy practices are implemented and

effective, and that mechanisms for privacy are built into UNM's business-as-usual activities.

- UNM's Information Security Program and its Components:
 - Implement various important updates and refinements.
- IT Funding Model for UNM:
 - Evaluate the current funding of information technology (IT) at UNM and provide a recommendation for an IT funding model.
- Software Use Policy and Software Asset Management (SAM) Process:
 - Develop a software asset management process to ensure the effective management, control, and protection of the software assets within UNM throughout their lifecycle.
- IT Shared Service Initiative/ Workforce Recruitment and Retention:
 - In collaboration with UNM Compensation, evaluate IT position classifications, conduct market rate analysis, and make recommendations for retention offers utilizing HR's pilot process.
- IT Building Modernization and Space Updates:
 - In an effort to facilitate collaboration and improve employee working spaces, IT Building 153 will be undergoing continuous improvements during FY 2024, including renovation of three restrooms within the building.
- Customer Relationship Management (CRM) Dynamic Portal and Retention:
 - In partnership with the Office of the Provost and other key departments across campus, will design, develop, and implement a dynamic individual-based experience for students and systems that provide engagement and communication.
- New IT Service Management System (ITSM):
 - Upon completion of an inclusive Request for Proposal process, award a contract for a new ITSM system to replace Cherwell. As the front door for IT services across the organization, UNM IT is seeking an ITSM solution that will be clear and easy to use for our students, faculty, and staff and integrate effectively and efficiently into the workflows of IT staff and service providers.
- Unified Data Warehouse:
 - Design and implement a secure and modern data warehouse/lake with a proper schema/design allowing for operational and predictive analytical reporting
 - demise the Operational Data Store; allow for growth by including new data sources.
- Development, Security, and Operations (DevSecOps) Automated Deployment Pipelines:
 - Implement DevSecOps processes and practices that enable IT Applications to deliver products and services with increased

velocity, reliability, and security by bridging and fostering collaboration with infrastructure, operations, support, and security teams. Standardizing and automating the deployment of services and solutions.

- Configuration Management (CMDB) Implementation:
 - Design and implement an Enterprise Configuration Management Database (CMDB) for tracking, forecasting, and capacity planning of UNM IT hardware and software. A CMDB takes all the siloed data across the enterprise required to run IT, and brings it together in a single place, giving IT Operations visibility into all the IT resources in the enterprise including management of the data and transparency of the health of the equipment and ecosystem.
- Esurvey (Opinio):
 - The Esurvey service is currently undergoing extensive development in preparation for a version upgrade, which will enhance functionality and security, expected in FY2023-FY2024.
- Single identity/Account for all UNM End Users:
 - UNM IT and HHS IT will consolidate all IT services from multiple directories into the UNM directory beginning in February 2024, and finishing approximately four years later. All users will ultimately be able to access all IT services with a single account, significantly reducing the number of logins required and dramatically improving the end user experience.
- Network Redesign:
 - The current UNM network architecture grew organically over the last 20 years. It is out of date and currently unstable and unreliable as compared to current networking standards. The implementation of the new design is expected to take approximately two years and will dramatically improve the reliability, performance, and security.
- End User Device Services:
 - UNM IT is in the process of designing a single service that should dramatically improve end-user support, security, reliability, and the performance of end-user devices campus wide while reducing overall costs to the university.
- Disaster Recovery:
 - UNM IT is in the planning stages of implementing new disaster recovery capability that would allow UNM to recover IT services within two to 10 days versus the current recovery time measured in months.
- New Director of Core IT Services:
 - A new position will be posted in order to raise the profile of the

Campus Outreach & Engagement team and to align it to the same structure as the other areas in UNM IT.

- New Professional Consultant:
 - Campus IT will bring on a professional consultant to work with the Information Security and Privacy Office to help streamline the purchasing and security review process for new IT procurement and to develop processes for the incident response.
- UNM IT Five-Year Plans with NMBLC and Explora:
 - Develop mutually beneficial multi-year plans with NMBLC and Explora to both support their efforts and provide clear pathways and alignment with UNM.
- Collaborate with OBAE on the Development of the Statewide Federal Grant Submissions and K-20 Programming:
 - UNM IT will maintain a leadership role in developing K-20 train-the-trainer programming with Pueblo, Tribal, nonprofit organizations, and schools pilot programs for the mutual benefit of K-20 students and UNM.
- UNM IT Community Events:
 - UNM IT will host the annual Tech Days and Mobile App Contest, as well as help facilitate the second annual Explora app contest for middle and high school students. UNM IT will continue to develop the Explora UNM IT Ambassador program for the mutual benefit of Explora students and UNM.
- Memorandum of Agreement (MOA) UNM Financial Services, Human Resources and UNM Information Technologies:
 - Collaboratively working together towards a common goal to jointly develop and transition to an integrated organizational structure, operating model, and standards resulting in delivery of effective and efficient technical services and technology solutions.
- Increase adoption of Open Educational Resources:
 - In partnership with University Libraries, the UNM Bookstore, UNM Online, UNM IT, and others, will increase use of electronic textbooks and Open Educational Resources to reduce paper consumption and save students money.
- Update Learning Environment Design Guidelines and standardize technology support in classrooms where possible:
 - Complete update to UNM Learning Environment Design Guidelines including technology standards to provide flexible and supportive spaces for 21st century classroom engagement. Seek funding and develop processes for bringing departmental spaces up to UNM technology standards for educational spaces, improve alignment and support across central and Department

classrooms.

- ERP Strategy and Roadmap:
 - Prepare analysis, recommendation, and budget comparison for executive leadership decision and funding consideration for a possible new Enterprise Resource Planning (ERP) implementation to improve administrative systems and processes, including an evaluation of areas of common fit/use for Health and Health Sciences.

iv. **APPENDIX**

Customer Service Metrics:

- Phone Assist: 37,465
- Walk-in: 114
- Self Service: 9,325
- Fastinfo: 1,059,617
- Password Change: 4,089
- First Call Resolution (FCR): 72%
- FCR Minus Infrastructure: 73%

Canvas Metrics:

Fall 2022:

Courses: 4,427

Student enrollments: 86,868

Fac enrollments: 5,342

Spring 2023:

Courses: 4,550

Student enrollments: 79,334

Fac enrollments: 4,917

Summer 2023:

Courses: 765

Student enrollments: 11,949

Fac enrollments: 837

Totals:

27,059 unique students

2,197 unique instructors

1,359 unique TAs

299 unique designers

178,181 student enrollments



Institutional Support Services

ISS.UNM.EDU



**Assistant
Vice Presidents**
LISA MARBURY
MELANIE SPARKS

Mission and Vision

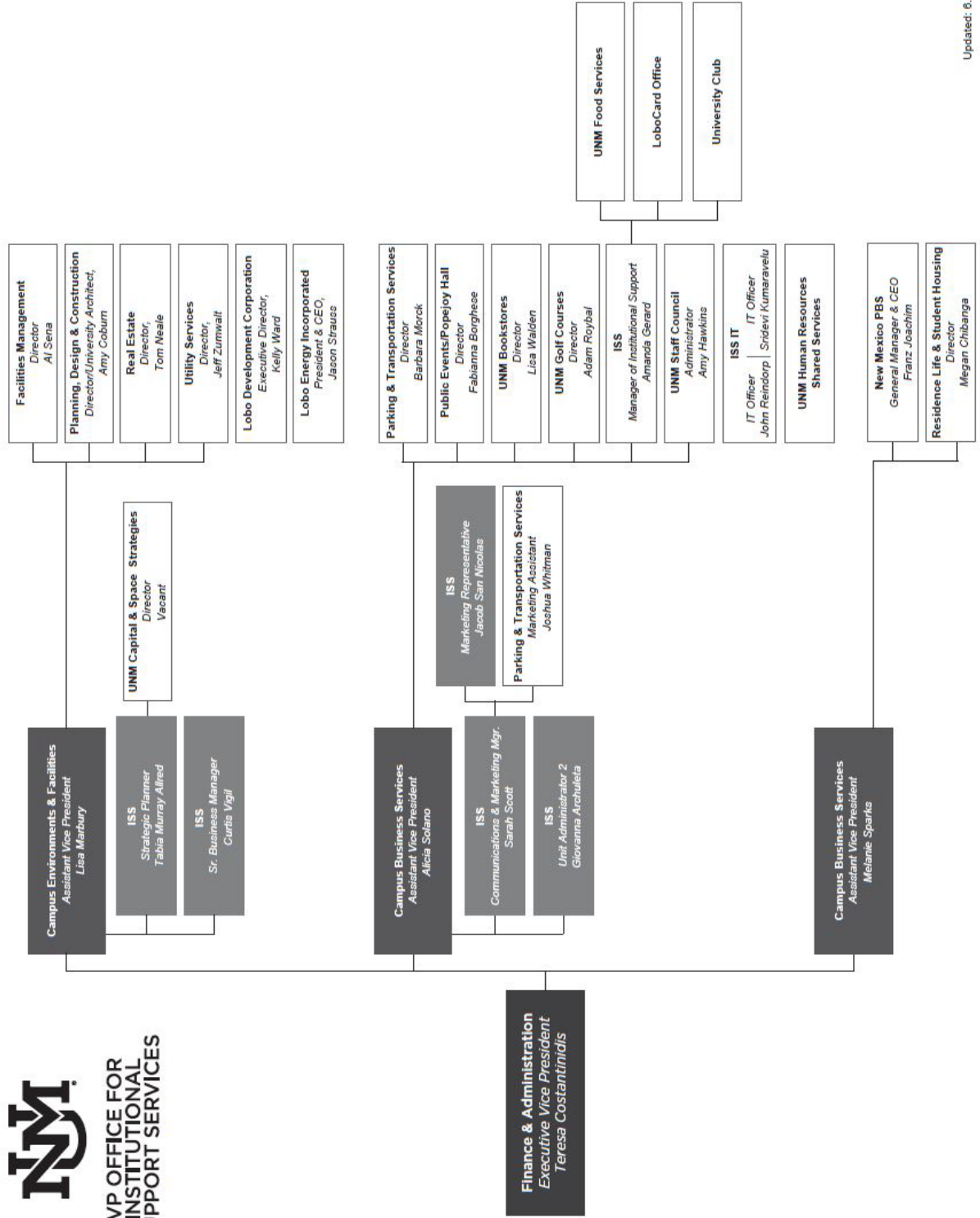
Mission

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 services, sustainability efforts, and the creation of unique experiences while supporting the University's core mission.

Vision

ISS has 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



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Appendix M: Staff Council

Appendix N: Utility Services Department

i. EXECUTIVE SUMMARY

Institutional Support Services (ISS) is a consolidation of the following Business Enterprises: Real Estate & Business Development, and Facilities & Planning units at the University of New Mexico (UNM). ISS is led by three Assistant Vice Presidents (AVP's) – Alicia Solano and Melanie Sparks overseeing Campus Business Services, and Lisa Marbury overseeing Campus Environments & Facilities. Additionally, under Campus Environments & Facilities, ISS plays an oversight role in the two University Research Park Economic Development Act organizations, Lobo Development Corporation (LDC) and Lobo Energy Incorporated (LEI).

ISS is comprised of the following departments/units:

Campus Business Services

- New Mexico Public Broadcasting Services (NMPBS)/ KNME
- Residence Life & Student Housing (RLSH)
- UNM Bookstores
- UNM Public Events/Popejoy Hall
- UNM Food
- LoboCard Office
- UNM Golf Courses
- ISS Information Technologies (ISS IT)
- Staff Council Administration

Campus Environments & Facilities

- Facilities Management (FM)
- Planning, Design & Construction (PDC)
- Real Estate Department (RED)
- Parking & Transportation Services (PATs)
- Capital & Space Strategies (CSS)
- Utility Services Department

FY23 continued to be a year of organizational changes not only within ISS Administration, but in other departments throughout ISS. AVP Melanie Sparks slowly began her transition into retirement in FY23, providing ISS the opportunity to post and recruit for a new AVP of Campus Business Services to allow for overlap and smooth transition duties. In May of 2023, Alicia Solano was hired as the AVP of Campus Business Services, overseeing UNM Bookstores, UNM Public Events, UNM Food, LoboCard Office, UNM Golf Course, ISS IT and Staff Council. Additional changes also included the discussion and reorganization of the Vice President Office for ISS, which included the search

for a new Vice President with an expected hire date in the Winter of 2023. In UNM Public Events, Fabianna Borghese was hired into the Director position in April 2023, after serving as interim for one year. After Utility Services became their own department in July 2022, a national search for a Director for the new department began. In November 2022, Jeff Zumwalt was selected to fill the position due to his prior leadership experience in Utility Services and extensive knowledge of their operations. After years without a Strategic Planner, ISS hired Tabia Murray-Allred in April 2023. This position will guide to the University's capital planning and funding towards UNM 2040 goals, as well as the Integrated Campus Plan. The Parking & Transportation Services (PATs) Director announced their retirement in Spring of 2023, which began a national search to backfill this critical position.

ISS has been engaged in several institutional planning efforts throughout the year that will not only impact the campus community short term but will also span into the future. In April 2023, UNM Food began to work on establishing and drafting a Request for Proposal (RFP) for a new food service contract, as the contract term with Chartwells is set to expire on June 30, 2024. The RFP was published in July 2023, with the ongoing selection process through FY24. This process has given ISS valuable insight into what the campus community is looking for in a food service provider regarding meal plans, sustainability, capital planning, service and much more. RLSH, in collaboration with PDC worked with consultant, Brailsford & Dunlavey (B&D) to establish a Strategic Housing Plan for the future of student housing. The plan identified over the course of action with a ten-phase approach to address the future of the University's student housing needs, while also effectively addressing deferred maintenance. Utility Services partnered with LEI on developing a Comprehensive Utility Plan. The plan was completed in the spring and provides a "road map" for the next 20 years. A significant component of the plan is a project that could substantially reduce the greenhouse gas emissions of the University. ISS Administration has been actively working with Human Resources (HR) Compensation and our two pilot departments for the rollout of the Salary Placement Equity Tool (SPET). Come July 1, 2023 all Level 5 departments will utilize SPET, with a full University implementation at a Level 3 in January 2024. This tool will be beneficial to our departments as it will be a guide to address equity of salary amongst the same positions within our Level 3 organization.

In FY23, many departments began initiatives that would improve both our campus interior and exterior environment. Throughout the year, PDC has worked on the Integrated Campus Plan (ICP), which will address all UNM properties and guide the University decisions on the physical environment of

each campus, to include safety, access, mobility and sustainability. All of these elements will set forth a “road map” to fulfill the goals identified in the UNM 2040 Strategic Plan. Engagement amongst the Branch Campuses, students, staff, faculty, as well neighboring campus communities, is integral in the success of the planning process. CSS continued providing space utilization assessments through the Asset Management Program (AMP) to academic units. The data collected provides these units recommendations for improving space utilization for instruction, office, laboratory, and current space assignments. FM accomplished a major effort to address ADA compliance needs at the University. They expended \$2,671,751 in seven months improving accessibility and safety in our most utilized buildings.

ISS and ISS departments were able to meet their financial goals. The total balance carried forward for the VP Office for ISS indices were:

816003 (general operating)	\$959.92
816007 (auxiliary consolidated)	\$1,439,821.00
816008 (self-supporting)	\$675.99

Total available reserves for ISS departments was \$19,037,727.28 with \$8,905,732.46 and \$10,131,994.82 categorized towards commitments and dedications respectively.

ii. SIGNIFICANT ACCOMPLISHMENTS

- UNM Bookstores worked in partnership with the Bursar’s Office and UNM IT to examine the needs of the students regarding technology. As a result, the allotted amount for the Bookstore Bursar account changed from \$750 to \$1,000 per Fall/Spring semester and from \$300 to \$500 per Summer semester. With the increasing need for students to view digital materials and be online for classes and discussions, technology sales played a huge role in FY23.
- CSS led the effort to revise UNM’s Space Allocation policy (UAP 5200). The draft policy clarifies the space allocation process and the Space Allocation Committee’s (SAC) role and responsibilities, as well as establishes the Space Management’s Team, a team of professional resources that supports the SAC and units
- FM also completed lighting projects in eight buildings at the main campus in Albuquerque, and 2 additional at the Gallup Branch investing \$1,265,751 improving the environments and reducing energy consumption. FM also was able to eliminate materials stored in the cultural significant facilities

at the DH Lawrence Ranch in Taos, permitting further efforts towards restoration of the site.

- UNM Food is taking a proactive approach to incorporating student, faculty, and staff feedback to improve the dining experience on campus. A comprehensive survey was conducted to gain valuable insight into the priorities, concerns, and expectations of campus diners. The collection and analysis of a significant number of responses, approximately 1,200, provided great insight into improving the campus dining program. The data trends were used to help craft the UNM foodservice request for proposals that will shape the future of dining on campus.
- UNM Golf Courses Championship Golf Course hosted the second stage qualifying school for the Professional Golf Association (PGA) Tour in October 2022. The Championship Golf Course played host to the Veteran's Golfers Association, a National Qualifier for the western region. In hosting these events with our local qualifiers, our course isn't just a local destination; it is high on the radar for a golf tourist destination.
- The LoboCard Office has a second year of experience with the new meal plan software, Atrium. With that additional experience, the meal plan process has been solidified and streamlined into something that is now standardized and efficient. Meal Plan auditing, sign ups, cancellation, and auto assignments processes have been defined in Standard Operation Procedures (SOP's). First Year Required (FYR) tagging has been automated and set up with all FYR criteria for real time FYR assignments/cancellations. This has resulted in a straightforward process that can be repeated by anyone following the SOP. That means the auditing and meal plan set up for new semesters/ fiscal years is repeatable in process, resulting in consistency and accuracy in findings and assignments. This has almost eliminated mistakes in billing and sign ups, and has greatly reduced the amount of email inquiries and confusion.
- NMPBS is the second largest distributor of television programming to public television stations in the country; Public Broadcasting System (PBS) is the largest. This means that except for PBS, public television stations receive more programming every day from NMPBS than anyone else. Through our shepherding of the PBS sIX Interconnection system, our position as the Alpha Test station for sIX, our leadership in the national rollout of this revolutionary system, NMPBS built a successful business model that has succeeded well beyond our expectations.
- PATS initiated "Pay-By-Plate" payment option for parking on campus at pay station machines, while updating their parking enforcement processes. Also, a new "Pay-by-Day" permit program was rolled out allowing pre-qualified faculty and staff customers without annual permits

to purchase parking at convenient locations, at a fixed rate and enforced utilizing the “Pay-by-Plate” option.

- PDC completed the first two phases of the ICP process with input from more than 50 UNM stakeholder groups in Albuquerque and across the state. This initiative promises lasting benefits to the University’s strategic facility plan.
- UNM Public Events was able to host the national Broadway tour *Hamilton* at Popejoy Hall after being rescheduled three times due to COVID-19, for a total of 24 performances with 44,773 patrons attending and total earned revenue of \$5,446,053.
- UNM Real Estate collaborated with Lobo Energy, to define the scope of work and feasibility of performance contracting and renewable energy projects at the Science & Technology Park (STP) in conjunction with capital replacement needs, to save energy, reduce our carbon footprint, and assist with long-term financial pro forma budgeting.
- Residence Life & Student Housing completed the Strategic Housing Plan with Brailsford & Dunlavey (B&D). For 18 months, RLSH engaged with B&D to conduct a comprehensive review of the value asset of campus housing to achieving the UNM 2040 goals and to develop a plan with and for RLSH to effectively address the backlog of maintenance and anticipated future needs of residential students. The efforts with B&D have materialized a ten-phase renovation plan, totaling \$120,000,000 and 12 additional recommendations.
- UNM Staff Council created a new committee, UNM Policy Review, chaired by the Staff Council President-Elect, which shall review draft University Administrative Policy (UAP) revisions and organize a Staff Council response as part of promoting constituent feedback process to proposed UAP policies developed by the University. The committee will perform review of existing policies and recommend changes to the appropriate policy office.
- Utility Services partnered with LEI on developing a Comprehensive Utility Plan. The scope of the plan was initially for the North Campus. However, the team expanded the scope to explore options to transition from natural gas heating to electrical heating. The plan was completed in the spring and included some exciting opportunities to decrease the carbon footprint of the University while meeting future growth.

iii. FUTURE PLANS

- UNM Bookstores main goal is to continue to grow our Inclusive Access, as well as explore the Equitable Access (EA) model for campus course materials. UNM Bookstores will work with leadership and multiple key

stakeholders of UNM Administration, including the Provost to provide information on these models and collectively move forward.

- CSS will continue to work on expanding the AMP to conduct additional space auditing, finalize the Space policy, and develop a space reduction plan.
- Facilities Management will work to develop models to determine proper budgeting levels for each division based on building square footage using FAMIS building information, existing budget levels, and industry standards. This initiative will guide the department in budget requests, staffing levels, and ascertain the ability to fulfill our business mandates. The aim is to have a draft by the calendar year-end with procedures to be updated annually. The overarching goal is to enhance the department's efficiency across all functions.
- UNM Food has collaborated with UNM IT and the Basic Needs Project to further develop and enterprise a food recovery app called LoboEats. The app is to launch in Fall 2023, which will allow UNM event organizers to post when there is excess food after an event, notifying users when there is food available to assist in reducing food waste and support food insecure Lobos. UNM Food is working with University Communications and Marketing (UCAM) to develop marketing materials and a visual identity for the app.
- UNM Golf Courses is in discussion and collaboration with UNM Food and Planning, Design & Construction (PDC) regarding improvements to the Championship Golf Course Pavilion and the Lobo Grill. Improvements that are being considered to the facility include those in the Lobo Grill, with construction beginning in FY24.
- The LoboCard Office, in conjunction with UNM IT is currently monitoring various vendors to operate the UNM Badging Software on an independent level. This will allow for more flexibility in the reporting fields and a more robust badging system in issuing the UNM credential through our office.
- NMPBS has completed a large project that created an archive of all the digital media assets at three New Mexico public television stations and five New Mexico public radio stations. These digital assets are now part of the Library of Congress and the New Mexico State Archives. NMPBS seeks to build out our own portal to build and house a portal that would make all of these digital assets available at no cost, to researchers, students, independent producers, and our own employees. NMPBS will work with other public television stations around the country to secure the cloud storage space at a minimal cost.

- PATS will be exploring parking and transportation solutions that include the expansion of “Pay-By-Plate” for pay station stall usage, the expansion of electronic patient parking permits, golf carts to augment campus transportation options, explore reconfiguration of existing parking lots and development of additional land parcels to expand customer parking options, as well as explore marketing options and opportunities to offset operational costs.
- PDC will continue to work on the Campus Safety Plan which will be completed in December 2023 to consider community and safety improvements carefully.
- UNM Public Events/Popejoy’s newest outreach program, Broadway for Teens, will be expanded to include more schools from all parts of the state of New Mexico. More than 400 students are expected to participate in the program in 2023-2024.
- UNM Real Estate will continue the real property database component of the ISS sponsored asset management program. By the end of the fiscal year, it is Real Estate’s goal to have all property data digitized and attached to the GIS database to facilitate preservation and improved access property related information. Data includes deeds, surveys, environmental reports, acquisition history, and appraisals.
- RLSH will be utilizing the Strategic Housing Plan developed in partnership with B&D to focus on physical improvements of the residential buildings to improve and enhance access to the physical space.
- Staff Council will work towards helping staff understand their role, rights, and responsibilities regarding changes with policy by holding regulator meetings between Staff Councils new committee, UNM Policy Review, the Staff Council President, Director of the Policy, and HR offices.
- Utility Services is researching the geo-exchange project that originated in the Comprehensive Utility Plan. This project includes installing geo-exchange wells underneath 30 acres of UNM property. These wells would provide a heat sink for a new hot water system. This system would replace the current steam heating system and dramatically reduce carbon emissions. There are many challenges and questions to be explored, however Utility Services will work through each until there is a clear plan going forward.

Appendix A: UNM Bookstores

Mission and Vision

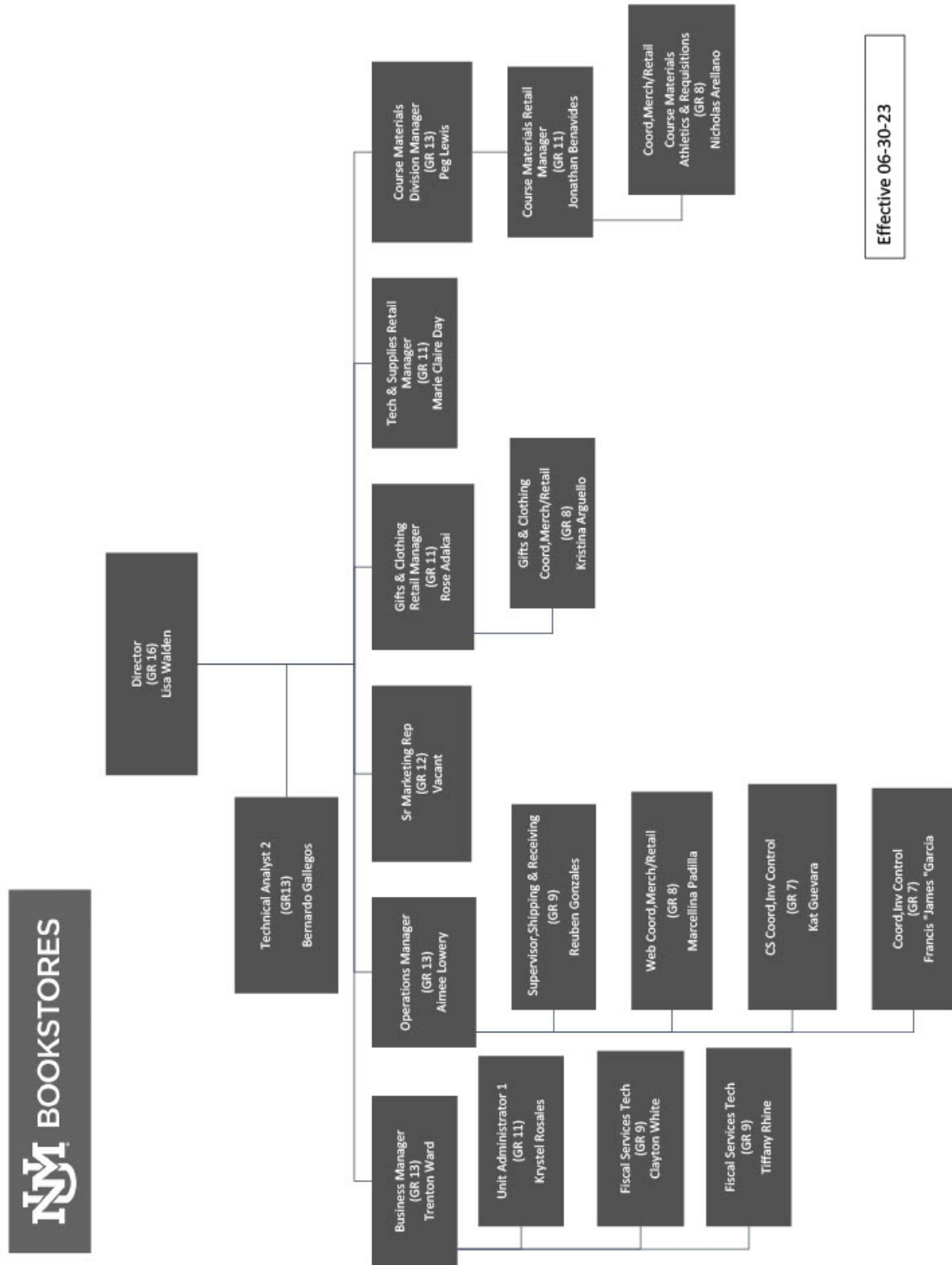
Mission

The University of New Mexico Bookstores are proud to be owned and operated by the University of New Mexico. Our primary mission is to serve the students, faculty, and staff of the University as well as our community customers. We strive to deliver quality products and services to enhance the educational, professional, and personal lives of our UNM community.

Vision

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

Organizational Chart



Effective 06-30-23

i. EXECUTIVE SUMMARY

The University of New Mexico (UNM) Bookstores had a very successful fiscal year in many facets of our operations. Our department surpassed our original budget by 52% for a positive \$84,132 to the bottom line after our Institutional Support Services (ISS) allocation. The growth of Inclusive Access (IA), the resurgence of book events and a 7.3% growth in our clothing merchandise accounted for the majority of increased sales. A decrease in Cost of Goods Sold (COGS) in multiple departments, with the largest decrease being in Technology, made up for the slight decrease in overall sales compared to budget and put the Bookstores ahead in Total Gross Profit.

The continued growth of IA reflects the partnerships we have built in our journey with this program. IA requires the Bookstore, faculty, and publisher to work together towards a contracted price (the lowest price offered) for digital materials available to our students on Day One in Canvas.

This also requires a good working relationship with UNM Information Technologies (IT) to assist with any help desk issues on Canvas for these courses, and to streamline main publishers so that their product is available directly through Canvas rather than through a code or other link.

By the end of FY23, 35.56% of all courses offered for West, Central, North, Online and Taos campuses were IA, compared to 30% the year before. This resulted in a 25.68% increase in sales for IA and eBooks over FY22 and enabled us to exceed our FY23 sales budget by 7.8%.

As we continue to grow our partnerships on campus, we were delighted to support many events during FY23. We continued our support for the Office of the University Secretary (OUS) with their commencements, as well as the School of Medicine (SOM) for their convocations. Additionally, we saw a resurgence in speakers and book events on and off campus, supporting the English Department with their book events throughout the year, and partnering with the National Hispanic Cultural Center for several large name events.

Staffing was a particular challenge this year, as we struggled to retain staff as a retail entity in a post-pandemic environment. Comparing the organizational chart shown on the previous page to the one for the previous fiscal year, 8 out of 17 full time employee (FTE) positions shown in FY22 were vacated and refilled. Additionally, as part of a reorganization to distribute responsibilities, have less direct reports for the director, and to right-size salaries compressed by the Mass Salary Update (MSU), three long-term employees were reclassified. As expected, there were growing pains for that degree of hiring in such a condensed time, and we are still in the first year with many of the new hires.

Adding new perspectives to the team has been beneficial, but opportunity for training and growth remain.

The budget summary for FY23, as mentioned earlier, includes a 52% increase to the bottom line compared to budget, and an 80% increase compared to FY22. While sales were down overall by almost half a percent (.45%), COGS was also down (.85%) which kept our gross profit above budget. Combined with a staggering \$241,956 or 14% savings in Labor Expenses compared to budget, we showed we could, at least briefly, do more with less. Our annual ISS Allocation was \$176,232. A table of our FY23 totals can be found in the appendix section of this annual report.

ii. SIGNIFICANT ACCOMPLISHMENTS

As mentioned in the Executive Summary, we are proud of the growth of IA at the UNM Bookstores. An increase of \$306,856 over budget, and \$870,319 over FY22 shows the commitment that the Bookstore, faculty, and our vendors have towards the success of this program. We believe that this program will continue to save our students money each semester and will work well in conjunction with Open Educational Resources (OER) to help lower the overall cost of course materials for all students.

With the increasing need for students to view digital materials and be online for classes and discussions, technology sales played a huge role in FY23. The Bookstore worked in partnership with the Bursar's Office and UNM IT to examine the needs of the students regarding technology. As a result, we changed the allotted amount for the Bookstore Bursar account from \$750 to \$1,000 per Fall/Spring semester and from \$300 to \$500 per Summer semester. Technology sales increased 10.18% from FY22 and made up 12.46% of all Bookstore sales for the year. We have worked closely with Apple to improve the selection of inventory available, with improved processors in the new MacBooks and iPads. We have also worked with Apple to improve our monthly payouts and decrease COGS for technology. All of this allowed us to beat our Technology gross profit budget by 17.4% and report a 4,473.6% increase over FY22.

Clothing sales in FY23 was up \$80,310 or 7.3% compared to budget and were up \$109,280 or 10% compared to FY22. We were ecstatic to see the students coming back in the store in Fall 2022, many with their parents, snapping up Lobowear to represent their school spirit. Most of the supply chain issues were resolved by FY23 and we were able to get orders received and processed for resale in record time.

Due to staff departing retail services, UNM Bookstores made a large investment in our staff in FY23, in which we rededicated ourselves to hiring the right staff at the right salary. We put extra focus into our hiring process, onboarding and training. We brought in Employee Occupational Development (EOD) to do a DiSC training with our staff once most FTE positions were filled and tried to use everyone's strengths towards the strategic goals of the Bookstore and the University. We continue to evaluate team building activities to boost employee morale, engagement, and retention.

UNM Bookstores continued to grow our partnership with UNM IT, meeting regularly with the team that handles Canvas and IA troubleshooting as well as meeting with the Chief Information Officer's (CIO) team to discuss marketing and recommendations for our students on specific computers in lieu of a laptop requirement. By pulling in the vendor, we were able to show UNM IT that certain models were much improved and a better value than some of the more expensive configured-to-order models initially recommended. This collaboration benefits the students in providing them the support they need for the products offered by the departments.

iii. FUTURE PLANS

UNM Bookstores main goal is to continue to grow our IA program. Our goal would be to attain between 70-80% saturation of IA courses and then explore the Equitable Access (EA) model for course materials that most lease operations and major college stores have adopted by this point. We will work with the Executive Vice President for Finance and Administration (EVPFA), our Assistant Vice President (AVP), and multiple key members of UNM Administration including the Provost to provide information on these models and collectively move forward.

UNM IT continues to be a consistently dependable partner. We will continue this relationship by beginning to offer Device Enrollment Program (DEP) devices to our UNM staff and faculty for departmental purchases. This is a new requirement from the CIO office and falls in step with all departmental computer purchases on North Campus currently. Devices purchased by departments may be enrolled in DEP at no cost, which will allow UNM IT easy deployment and management of departmentally owned computers.

UNM Bookstores will continue to invest in the development of our staff and have limited plans to send certain staff to conferences this year. The partnerships made at these conferences, with vendors and with other schools, is essential to the preservation of having an independent bookstore on campus. This allows for faculty freedom, more student choices, and keeping the money

spent on utilities, grounds, maintenance, custodial, and parking right here on campus.

One of our largest future projects is to identify the space and equipment needed for the Bookstore to meet the needs of UNM 2040. We will continue to work with the EVPFA, AVP and other campus partners to identify a new space for this future Bookstore that is more precise, geographically centralized, and fully engaged with our campus.

iv. Attachment A: Financials

FY2023 Totals	
Beginning FY23 Balance	\$613,190
Total Revenues	\$9,557,074
Total Operating Expenses	(\$9,634,396)
ISS Allocation	(\$176,232)
Ending FY23 Balance	\$359,636

Appendix B: Capital & Space Strategies

Mission and Vision

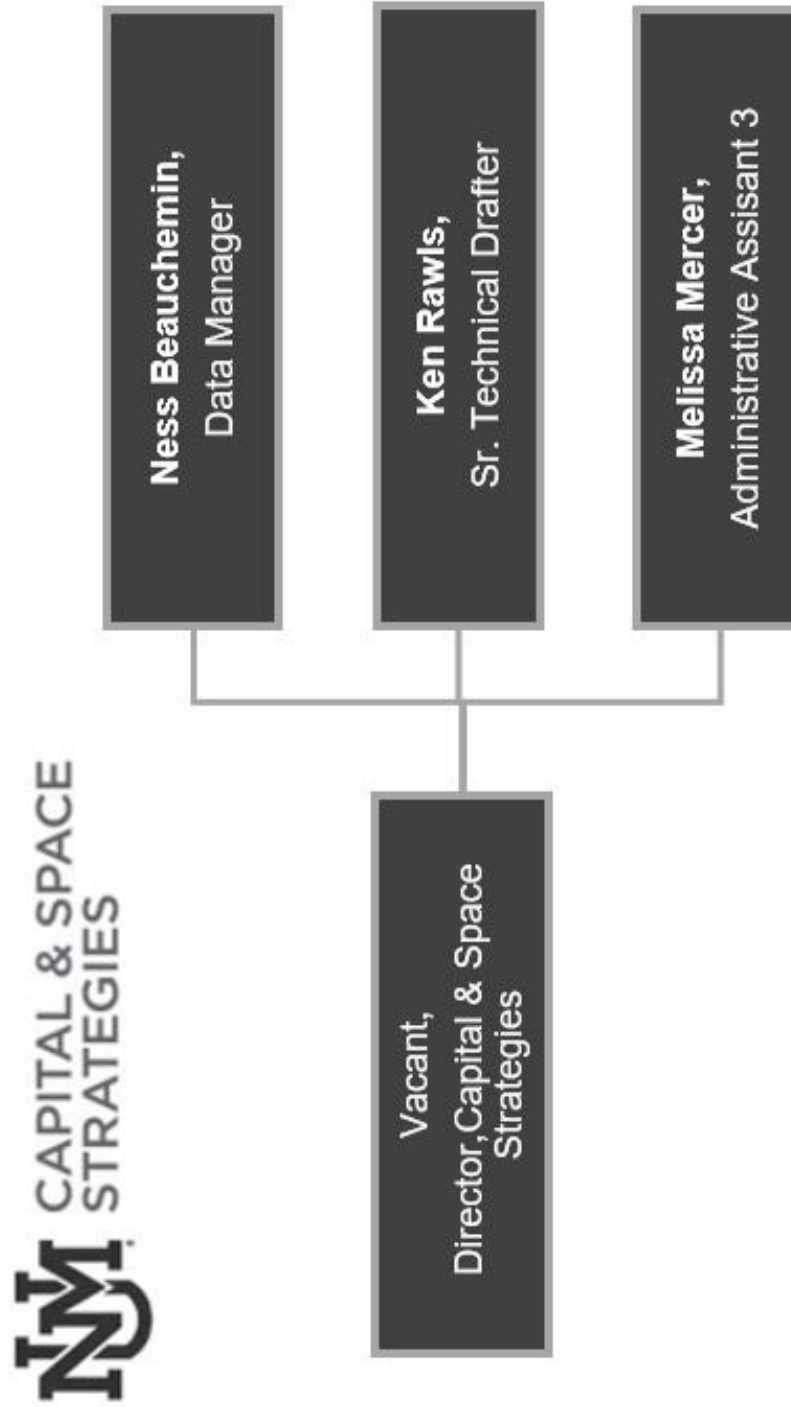
Mission

Guiding the strategic use and development of UNM's capital resources.

Vision

Defining the framework for effectively utilizing and modifying UNM's capital resources to support academic innovation, research advancement, and community services.

Organizational Chart



i. EXECUTIVE SUMMARY

Capital & Space Strategies (CSS) completed its fourth operational year in FY23. The unit provides strategic coordination, guidance, and planning resources for institutional space, facility physical assets, and capital resources for the University of New Mexico (UNM).

Capital planning includes working with Leadership and campus stakeholders to develop integrated, strategic capital projects that align with UNM 2040 Goals in addition to preparing the annual Capital Outlay Plan.

- Coordinates and facilitates the capital planning process for the University through the Capital Planning Leadership Team (CPLT)
- Assists with defining and prioritizing projects for future funding targets/requests
- Develops capital project plans and integrated funding strategies
- Manages project construction approvals through UNM and State Governing Boards

Space management includes providing the campus with space data analyses to aid decisions regarding major capital projects and other campus planning endeavors and managing information on the utilization of space.

- Oversees the Space Allocation Process
- Expansion of the Asset Management Program (AMP)
- Conducts space studies and audits consistent with campus strategic objectives
- Supports space utilization studies and strategic space planning
- Supports and informs the campus space inventory and database
- Supports space assignments on and off campus

CSS also serves as an impartial facilities team member, providing oversight coordination of the UNM Project Intake portal and Project Intake metric reporting.

CSS had an operating budget of \$411,328 from Instruction & General allocation.

- Personnel: \$299,145
During FY23, CSS had four regular full-time staff members.
- FAMIS: \$67,329
Annual operation and migration of FAMIS for UNM's space data.
- Operations: \$25,271

ii. SIGNIFICANT ACCOMPLISHMENTS

CSS was successful in the coordination of capital planning and institutional space resources, in which we coordinated and facilitated the following capital planning efforts across UNM:

- Capital Planning Leadership Team: Under the leadership of Provost Holloway and Executive Vice President for Finance & Administration Teresa Costantinidis, CSS managed the annual capital outlay process. The Comprehensive Capital Plan was improved to assist in organizing the capital needs for the Central, Health Sciences and Branch campuses.
- UNM was successful in receiving capital appropriations from the 2023 New Mexico State Legislature.
 - General Funds projects totaling \$45,974,897
 - UNM Main \$10,036,622
 - UNM Athletics \$7,003,300
 - UNM Health Sciences Center (HSC) \$18,605,000
 - Harwood Museum \$250,000
 - Gallup Campus \$2,800,000
 - Los Alamos Campus \$1,881,750
 - Taos Klauer Campus \$3,903,225
 - Valencia Campus \$1,495,000
- UNM was able to move 56 capital projects through the construction approval process, representing \$167,341,593 million.
 - UNM Central \$117,173,692
 - UNM Health Sciences Center (HSC) \$3,787,500
 - UNM Hospital \$15,004,498
 - UNM Branches \$31,375,903

CSS team members provided oversight, metrics, and coordination of 273 UNM projects.

Through the AMP, CSS led the effort to revise UNM's Space Allocation policy (UAP 5200). The draft policy clarifies the space allocation process and the Space Allocation Committee's (SAC) role and responsibilities, as well as establishes the Space Management's Team, a team of professional resources that supports the SAC and units. Along with the revision of the policy, a website and process documentation were developed to increase the transparency of the space allocation process and provide direction for campus units with space needs.

Throughout the financial year, CSS keeps the FAMIS database up to date by requesting updates from departments and branches via a space survey, and by auditing space usage in onsite walkthroughs. By the end of the fiscal year, square footage verified in space audits totaled 1,121,373, and square footage verified in completed space surveys totaled 99,825, with a total of 1,221,198 square feet of space in UNM Central, Branch, and Remote properties verified in FY23.

Through the Asset Management Program (AMP) objective to improve space utilization at UNM, CSS provided assessments to academic units, bringing multiple data sources of metrics into a single document. The assessments review four elements of space utilization:

- Current space allocation assignments
- Instruction space utilization metrics
- Office space utilization metrics
- Laboratory space utilization metrics

In addition, the assessments provide findings and recommendations for improvements in space utilization for the unit. Research and education are core missions for the University and occupy the most space, therefore we started with the UNM Schools and Colleges. During FY23, CSS reviewed 1,244,496 square feet of space, completing assessments for ten Schools and Colleges in addition to UNM's four Branch Campuses:

- UNM Taos
- UNM Valencia
- UNM Los Alamos
- UNM Gallup

iii. FUTURE PLANS

- Capital Planning Leadership Team progression
 - Comprehensive Capital Plan improvements and presentation of capital plan information
 - 5-year capital project criteria for selection
- Asset Management Program
 - Expand Asset Management Program
 - Continue Space Utilization Assessments across UNM and revisit with units to compare previous assessments to current assessments
 - Space Auditing
 - Completion of revised Space Policy
 - Space Reduction Plan

Appendix C: Facilities Management (FM)

Mission and Vision

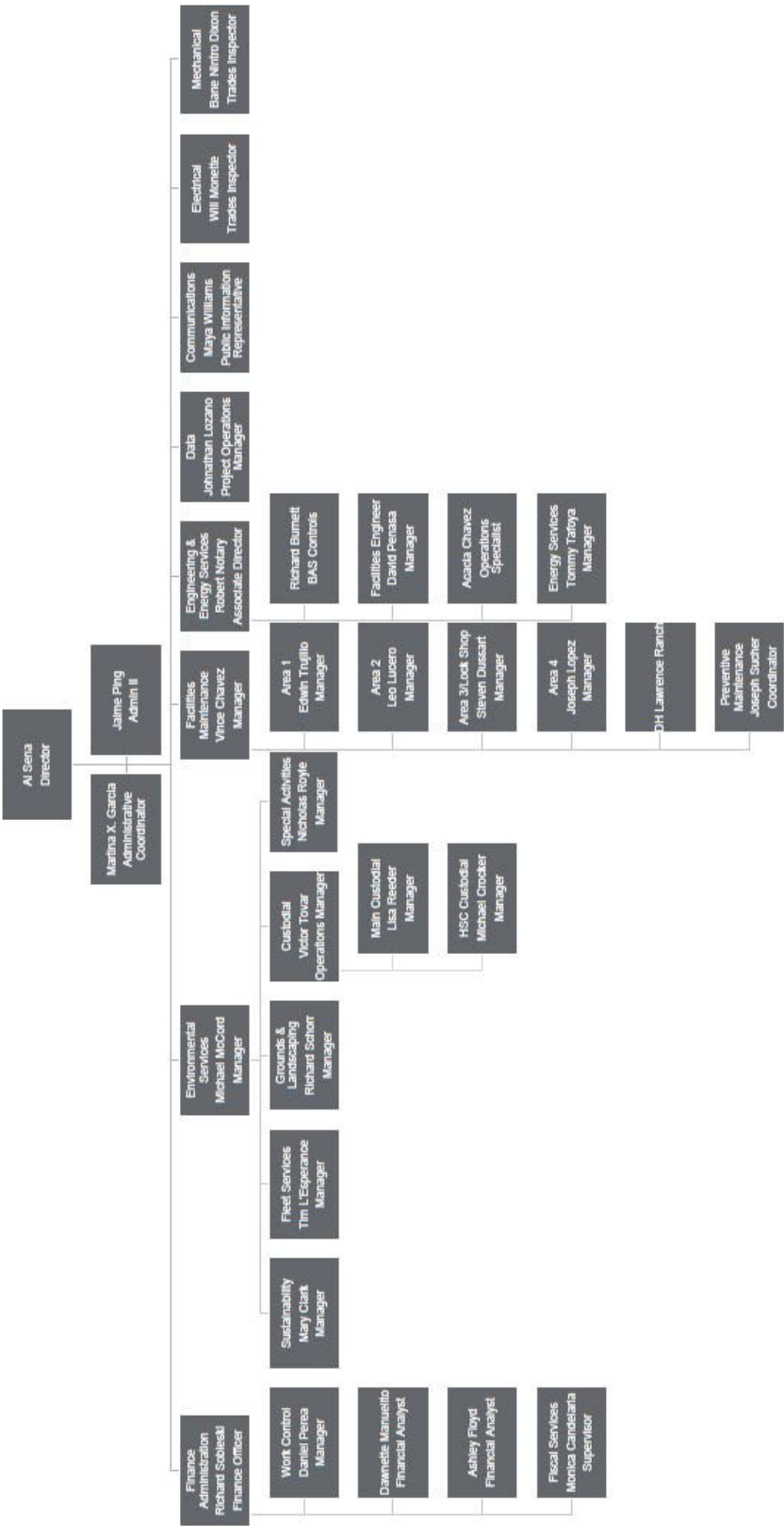
Mission

Facilities Management's mission is to consistently deliver effective programs and efficient facility service based on sustainable and collaborative outcomes aligned with The University of New Mexico's core mission.

Vision

Facilities Management's vision is that our community, state, and national peers will recognize The University of New Mexico's Facilities Management as a leader in campus sustainability and facilities stewardship.

Organizational Chart



i. EXECUTIVE SUMMARY

Facilities Management (FM) at The University of New Mexico (UNM), is an integral component of Institutional Support Services (ISS), embodies the future-oriented aspirations that drive our university forward. Through our extensive array of divisions, from Engineering and Energy Services to Facilities Maintenance, we've harmonized our services to capture the spirit of innovation, sustainability, and community that our institution champions.

In the past year, FM has steered a transformative path, reshaping the UNM landscape in ways that resonate deeply with the vision set out for the next two decades. Our drive for excellence and customer satisfaction has been amplified by initiatives that blend sustainable energy solutions with state-of-the-art infrastructure, creating spaces that are not only functional but also inspire academic and personal growth.

FM's major accomplishments include a major effort to address ADA compliance needs and expended \$2,671,751 in seven months improving accessibility in our most utilized buildings. FM also completed lighting projects in eight buildings at the main campus in Albuquerque, two additional at the Gallup Branch investing \$1,265,751 improving the environments and reducing energy consumption. FM also was able to eliminate materials stored in the cultural significant facilities at the DH Lawrence Ranch in Taos, permitting further efforts towards restoration of the site.

Our commitment to quality has been the cornerstone of our achievements. Each enhancement, each new project, reflects a proactive approach towards a campus that is technologically advanced and responsive to the evolving needs of its students, faculty and staff.

With fiscal stewardship as a guiding principle, our strategies in resource optimization and revenue growth have been shaped to ensure that our performance benchmarks not only meet but often surpass expectations. In doing so, we've set a standard that aligns seamlessly with the long-term objectives of our institution.

Through power of collaboration, evident in our synergies with entities like Health Sciences Center and the University of New Mexico Hospital, has enabled us to craft a unified vision for the campus — a vision that emphasizes innovation, inclusivity, and community engagement. Our collective efforts aim to propel UNM into a future where it stands as a beacon of academic and research excellence.

Our focus on adaptability, wellness, and continuous improvement ensures that every stride we take, every innovation we introduce, echoes the broader

transformative goals of our institution. This holistic approach ensures that FM remains a key player in sculpting a future that's vibrant, inclusive, and ready to face the challenges of tomorrow.

In alignment with ISS's foundational values, FM is committed in its mission to position UNM at the height of educational excellence. Through our services, experiences, and values, we pledge to support the goals of the university.

Budget Summary

- FY23:
 - Revenues: \$33,489,474
 - Expenses: \$34,375,832
 - Year-end Balance: -\$306,629
- Building Renewal and Replacement:
 - Revenue: \$3,547,971
 - Expenses: \$2,848,162
 - Carried forward for completion in FY24: \$85,032

ii. SIGNIFICANT ACCOMPLISHMENTS

Engineering and Energy Services

- The Engineering & Energy Services Division (E&ES) concluded FY23 with a favorable financial position, registering an end-of-year surplus of \$674,180. These funds were judiciously reallocated to address other pressing FM necessities.
- The Campus Building Automation System's ongoing maintenance and management expenses were efficiently offset using E&ES revenues, given that this system doesn't receive any Instruction & General (I&G) allocation.
- In support of our commitment to infrastructural advancement, E&ES allocated roughly \$80,000 from reserves towards the interior refurbishment and expansion to accommodate the increasing needs of our Energy Services team.
- Through collaboration with the Athletics Department, E&ES engineers played an instrumental role in the design and installation of the state-of-the-art field lighting system at the University Stadium. Fiscal prudence was exhibited by astutely assessing and repurposing existing infrastructure, namely the poles, resulting in considerable cost

savings. This underscores our continuous dedication to efficiency and sustainability.

- Substantial enhancements were made at the Animal Research Facility Labs (G74-G82), specifically in the overhaul of the exhaust ventilation and alarm systems. These modifications were vital to bolster the efficiency and safety of this pivotal research. Seamless coordination among various trade specialists enabled the work to be executed within a notably shortened shutdown window. Furthermore, the commendable 'all-hands-on-deck' approach by our Energy Services team ensured that control work was executed internally. This strategic decision culminated in a net saving of approximately \$50,000 compared to external contractor quotes.
- Following the inauguration of the sophisticated Physics, Astronomy, and Interdisciplinary Sciences Building, our dedicated Energy Services personnel finalized the innovative lighting system. This entailed the meticulous installation and integration of a pioneering server, which facilitates remote access and control over the building's lighting. Proudly, this cutting-edge system is a premier addition to the university and signifies the genesis of our campus-wide lighting control blueprint.

Environmental Services

- The division addressed budgetary challenges and a departmental hiring freeze through reprioritizing work assignments and maintenance schedules by focusing on key areas of the campus. Unit consolidation and increased structural measures allowed staff to meet standards and ease stress due to limited staff.
- Regular Environmental Services Leadership Team Meetings fostered better internal communication, standardized practices, and cohesive staff responses.
- Supervisor workgroups, initiated by the Leadership Team, tackled staff concerns, procedural issues, and enhanced inter-unit synergy.

Automotive

- Faced staff shortages, but boosted efficiency with the recruitment of 3 Auto Technicians.
- Significantly reduced their work backlog, offering faster service to clients.
- Experienced an increase of in-shop fabrication and custom projects.

Custodial Services

- Faced staffing shortages of 30 to 40 positions due to budgetary constraints.
- Despite challenges, Main Custodial Services maintained over 4.2 million square feet of space, meeting the Association of Physical Plant Administrators (APPA) Level 2 cleaning standard.
- Health Science Center Custodial Services covered over 1.5 million square feet, achieving APPA Level 1 cleaning standards.
- Staff participation in initiatives like Director's Huddles, safety-centric SOPs, and Occupational Safety and Health Administration (OSHA) 10 training for managers, has increased performance levels and expectation understanding.
- Initiated extensive cleaning efforts pre-graduation and began servicing the new ROTC building, emphasizing refining building cost data.

Grounds and Landscaping

- With 28 staff members, the team cared for over 300 acres of campus landscape, meeting APPA Level 2 standards.
- Completed major projects including Duck Pond cleaning and refurbishments, campus spring cleaning, sidewalk upgrades for American's With Disability Act (ADA) compatibility.
- Provided support for a range of initiatives such as assisting Biology Doctorate candidates with research activities, aiding in campus events, restriping crosswalks for increased safety, and external use of UNM grounds.

Sign Shop

- Initiated proposals for equipment upgrades to improve sign fabrication capabilities and facility relocation.
- Achievements included ADA signage replacement, interior signage upgrades, and completion of varied signage projects including a new sign for the USS New Mexico Navy Bell on Smith Plaza.

Special Activities

- Led efforts in recycling critical equipment across campus.
- Staffing improvements included finalizing HR job description approval for a Special Activities Coordinator and a Manager for the unit.
- Supported various campus activities including classroom moves, New

Student Orientation events, and department relocations.

Recycling

- Provided consistent services to key campus areas, especially as in-person operations resumed.
- Collaborated with Grounds and Landscaping to improve recycling and trash processes during peak times to meet reconfigured priority area needs.
- Engaged the UNM community at the 13th Annual Sustainability Expo, promoting university recycling efforts.

Finance and Administration

- Revised plant fund and project reports for enhanced readability, featuring various project funding sources including Building Renewal and Replacement (BR&R), fiscal year carry-forward, one-time special projects, and Energy Sustainability Surcharge projects.
- Initiated unique indexes for BR&R funds annually, pending Higher Education Department review. SOPs updated accordingly.
- Executed a comprehensive position/job analysis to identify roles and potential employee shortages.
- Deepened collaboration with the Office of Research, extending financial support to Facilities Management to better serve research areas.
- Embedded the work order Computerized Maintenance Management System known as TMA data into the operational data store, making it accessible in MyReports, with regular updates by Financial Analysts.
- Utilized Power BI, a business informatics tool for extracting Facilities Maintenance data, streamlining data analysis and campus planning.
- Ensured expenditure recording accuracy in TMA with the aid of the Operations Manager.
- Shifted to a twice-a-week invoicing system from bi-weekly, enhancing revenue updates in real-time via MyReports.

Work Control

- Processed 57,897 work orders, including both corrective and preventive maintenance.
- Enhanced the Outage Notifications process for improved communication with the University community.
- Initiated High Priority Alerts with UNM IT for time-sensitive work

orders.

- Deployed a monitoring system for the CX Web Phone Manager to swiftly address messages and work orders.
- Engaged with Financial Analysts to resolve revenue loss issues during billing.
- Conducted advanced TMA training sessions for different Facilities Management teams.
- Collaborated on timely elevator maintenance/repair notifications to minimize campus disruption.

Facilities Maintenance

- The division reported three accidents. In response, the FM Safety Committee, with support from the Campus Safety Council, recommended changes devoted to advancing workplace safety.
- Staff members undertook various training and courses from Learning Central, Environmental Health and Safety, and APPA seminars to improve and maintain current knowledge on various trade-specific topics. Electricians specifically underwent additional critical training.
- The division finalized 31,430 preventive maintenance work orders, totaling 69% of the overall tasks, a 5% dip compared to FY22. Simultaneously, 13,698 corrective work orders were handled, totaling 31% of the total. The 14% decrease from FY22 is attributed to the scarcity of certified technicians in different trades, subsequently increasing vendor expenses.
- Elevator enhancements occurred at Health Sciences Library & Informatics Center (HSLIC), SURGE building, School of Law, and Electrical and Computer Engineering (ECE). Comprehensive evaluations of more elevators in HSLIC and ECE were integrated into the Facility Investment Needs (FIN)/BR&R agenda.
- The UNM Water Management Program assessed 192 water sites over the year. To aid this, FM Maintenance staff tackled 4,717 preventive work orders, alongside 39 corrective ones for remediation.
- Key infrastructure developments this year encompassed the Campus-Wide ADA Upgrade Project, the KNME ADA restroom and store front renovation, the Scholes Hall steam trap, Marron Hall's main sewer line reline, a stucco patch for Capstone across five campus gates, and the culmination of elevator upgrades in numerous prime campus zones.

Operations

- Addressed and corrected data parity inconsistencies, ensuring clarity

and accuracy in project reports.

- Launched the FM Master Project List to enhance transparency and manage PDP-approved projects effectively.
- Leveraged business informatic tools with TMA Data integration, reflecting our dedication to harnessing advanced technology.
- Enhanced the Project Development Plan process for improved responsiveness and agility.
- Conducted a comprehensive financial data analysis, identifying discrepancies and reinforcing financial transparency and oversight, especially in P-Card purchases.
- Instituted a reconciliation process between P-Card and TMA expenses to bolster financial clarity.
- Advanced our management approach by integrating project funding visibility within initial project requests.
- Forged collaborations to establish key performance indicators for initial project requests and financial procedures, emphasizing our drive for enhanced inter-departmental collaboration.

iii. FUTURE PLANS

Engineering and Energy Services

- E&ES has made significant advancements with its Laboratory Safety initiative, which emphasizes room pressurization and hood airflows. The new system architecture is fully monitored and includes redundancy in essential areas for reliability. As this system extends across the main campus to nearly 1,000 fume hoods, it will set a new safety standard for research labs. The rollout will be strategic, considering lab risk, current system structures, and available funds.
- The E&ES interior lighting initiative aims to enhance comfort, energy savings, and control. These updated lighting systems are integrated with building control systems to reduce operations during unoccupied periods. Projects are prioritized to benefit public spaces, classrooms, and laboratories the most.
- E&ES's exterior lighting initiative is working towards centralizing control over all outdoor lighting, including walkways and parking lots. This control system aims to offer safer, more reliable, and energy-efficient lighting. The flexibility of this system will also accommodate special event needs. The initial phase of this system will be introduced to a part of the central campus in the next fiscal year.

Environmental Services

- Streamline the recruitment process to ensure a steady influx of talent, emphasizing roles with high attrition, aligning with UNM 2040's goal of fostering a diverse and inclusive community.
- Reinforce regular communication frameworks, such as the Director's Huddles, to facilitate top-to-bottom alignment in strategic priorities and ensure that every team member feels heard and valued, supporting the ethos of shared governance.
- Enhance staff training, focusing not only on safety-centric SOPs and OSHA 10, but also on sustainability practices in line with UNM 2040's commitment to sustainability and well-being.
- In the Automotive Services unit, adopt technology-driven solutions and predictive maintenance to reduce work backlogs, ensuring that our fleet supports the seamless mobility and accessibility envisioned in the UNM 2040 plan.
- Expand waste management efforts, emphasizing increased recycling stations and community education. This will bolster the campus's commitment to sustainability, ensuring that we reduce our environmental footprint.
- Prioritize maintenance based on feedback, ensuring the most frequented and crucial areas of the campus remain in pristine condition, echoing UNM 2040's emphasis on place and identity.
- Deepen community engagement through initiatives like the Sustainability Expo, fostering a sense of ownership and care among students, staff, and faculty towards the campus's environmental goals.
- Collaborate with other divisions to optimize cost efficiency, ensuring that we provide premium services while maintaining fiscal responsibility.
- Explore the integration of state-of-the-art equipment, especially in units like the Sign Shop, to enhance the campus's aesthetic appeal and functionality, reflecting the forward-thinking vision of UNM 2040.
- Regularly review and adapt our practices based on feedback, ensuring we remain agile and responsive to the evolving needs of the UNM community, mirroring the adaptive and innovative spirit of UNM 2040.

Finance and Administration

- Develop models to determine proper budgeting levels for each division based on building square footage using FAMIS building information, existing budget levels, and industry standards. This initiative will guide the department in budget requests, staffing levels,

and ascertain the ability to fulfill our business mandates. The aim is to have a draft by the calendar year-end with procedures to be updated annually. The overarching goal is to enhance the department's efficiency across all functions.

- Explore key indicators that influence staff efforts and expenses by collaborating with division leaders and managers. This understanding of activities and their correlation with budget numbers will help in assessing areas for potential cost savings without compromising service levels. For instance, evaluating preventive maintenance schedules can provide insights into timetables, service levels, staff deployment, and priority actions. This is an ongoing initiative with periodic reviews, aiming to foster staff collaboration, cross-divisional synergy, and a collective understanding of budgets and teamwork.
- Streamline the Chrome River approval queue for FM departmental P-Card purchases by incorporating more approvers into the "Department choice" option. The procedure involves completing and submitting the appropriate form to Financial Systems Management by the end of 1st Quarter, FY24. Given Facilities Management's unique cost accounting model—with many pass-through costs covered by our user's P-Cards and billed through work orders in TMA—it's pivotal to prevent errors at the initial stage. This ensures purchases are correctly allocated, minimizing mistakes and ensuring transparency.

Facilities Maintenance

- Engage in proactive recruitment of Facilities Maintenance trades support staff, leveraging modern platforms such as Traded Up to attract skilled personnel.
- Launch an in-house trades training program to cultivate and refine the skills of our team, emphasizing self-sufficiency and the development of specialized talent from within our organization.
- Prioritize infrastructure upgrades for FY24, including elevator modernizations at pivotal locations like HSLIC #2 and Centennial Library #2.
- Implement plumbing advancements and the installation of new water heaters at Family Practice, underscoring our commitment to operational efficiency and the provision of top-tier facilities.
- Empower our leadership with APPA Training for Area Managers, aligning with UNM 2040's commitment to innovation, best practices, and ongoing progress.

Operations

- Focus on the revitalization of Business Operations & Procedures across FM divisions, aiming for standardization and identification of missing Standard Operating Procedures.
- Prioritize D.H. Lawrence Ranch site improvements in line with UNM's directives. This includes addressing crucial maintenance needs, removing discarded materials, vehicles, and equipment, and procuring cost estimates for historical enhancements.
- Set concrete dates for data exports, particularly regarding UNM projects for annual Net Asset Value (NAV) recalculations, ensuring synchronization with established procedures and planning activities in support of UNM 2040.

Appendix D:

UNM Food

Mission and Vision

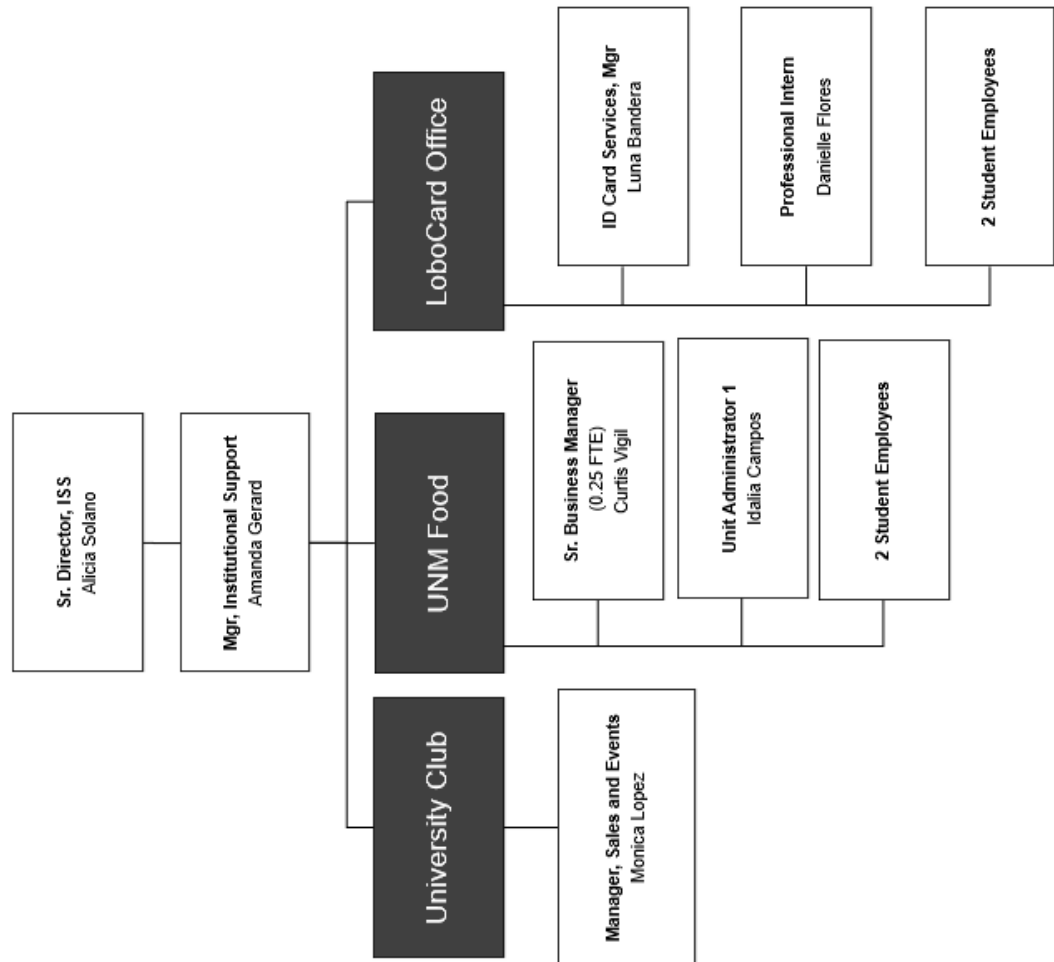
Mission

UNM Food is committed to providing an exceptional dining environment while ensuring quality food that addresses diverse nutritional and cultural needs.

Vision

UNM Food 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 (SUB) or across campus, the La Posada Dining Hall, Catering or Vending Services, we leave them with a positive experience that is unforgettable.

Organizational Chart



i. EXECUTIVE SUMMARY

The overall operational budget for UNM Food in FY23 was \$2,482,555.00. The food service budget is based primarily on commissions received through the contract signed with our food service provider, Chartwells. UNM Food is comprised of two full time staff members, one support staff position shared with the University Club, and student positions shared with the Lobo Card Office and University Club.

The department oversees all operations pertaining to food and works in partnership with Chartwells to provide the university community with food options across campus. As part of the overall budget, \$430,000 is received by UNM Food to ensure we have purchased all the proper kitchen and retail equipment to operate our food venues on campus, as well as service, repair or maintain all the equipment to keep them functional daily. With proper daily maintenance and handling of our equipment, we can mitigate our annual expenses and utilize our yearly commissions to plan for future capital projects. The office has focused on the commitment to driving efficiency related to the repair and replacement funds by implementing new systems based on best practices as well as repurposing equipment across units and menu creation based on equipment that has already been purchased.

The department's primary revenue source remains to be commissions received from Chartwells. We rely on cost management and the consistent monitoring of our cost centers and units to strategically plan for profitability and the strengthening of our capital investments. Food service transfers funds to our capital expenditure account, which will allow for planning of new and/or upgraded facilities on campus.

The financial components of our contract negotiations with Chartwells are based on optimizing return to the university by way of guaranteed commissions, a profit-sharing provision, capital spending, and accurate reimbursable payments that reflect actual spending in equipment repair, equipment replacement, and utilities. These reimbursable structures were negotiated in the best interest of the university based on a thorough historical cost analysis by our team.

ii. SIGNIFICANT ACCOMPLISHMENTS

Café Lobo

UNM Food opened Cafe Lobo in Fall of 2023 to fill the vacancy left by Satellite Coffee the year before. The brand was created in collaboration with University Communication and Marketing (UCAM) creative services. The brand infuses a contemporary school spirit into the Student Union Building. As an internal brand, the cafe has the freedom to create menus and hours that cater to the needs of the campus community.

Addressing Food Insecurity

Emerging data and experiences with our own students have showed that food insecurity amongst college students has major impacts on student success. Our department has engaged in new conversations, collaborations, and behaviors that allow us to participate in creating solutions.

- UNM Food joined the Basic Needs Grand Challenge Team to offer insight into the operational opportunities for change.
- UNM Food also partnered with the Lobo Campus Food Pantry to initiate food recovery from retail units to the pantry, meal swipe donations, and making bulk purchases for products needed in the pantry.
- Provided meal plan holders philanthropic opportunities at select dining events to benefit food insecure students.
 - Meal swipe donations, dining dollar donations, meal packing events.
- Began a collaboration with the Basic Needs Project and University of New Mexico Information Technologies (UNM IT) to enterprise a mobile application that will allow Lobos to share excess food from UNM events and meetings.

New Local Partnerships

UNM Food added new local partners to the retail portfolio that improve our sustainability and our local economy.

- Mata G, a popular eatery on Central Avenue, now provides thousands of products per week that are nutrient dense and address many dietary restrictions and accommodations. The products are all vegan or vegetarian and many provide dairy-free and gluten free options that our diners enjoy. Meal swipes are accepted for Mata G items making them even more accessible to our students.
- Chamoy Bar, a local Latina owned business, was also added to the retail portfolio. The brand has offered a unique and authentic taste of Albuquerque to UNM's campus. Meal plan holders can also use a meal swipe for Chamoy cups in our retail stores.

Campus Wide Survey

UNM Food is taking a proactive approach to incorporating student, faculty, and staff feedback to improve the dining experience on campus. A comprehensive survey was conducted to gain valuable insight into the priorities, concerns, and expectations of campus diners. The collection and analysis of a significant number of responses, approximately 1,200, provided great insight into improving the campus dining program. The data trends were used to help craft the UNM foodservice request for proposals that will shape the future of dining on campus.

UNM Food Request for Proposals (RFP)

The current foodservice contract term will expire on June 30, 2024. UNM Food began the process of drafting an RFP and forming a selection committee to evaluate bids. The committee includes a variety of stakeholders to ensure the selection process will be thorough and well-informed. The RFP will be published in July 2023 and the selection process will be ongoing through FY24.

iii. FUTURE PLANS

LoboEats

UNM Food has collaborated with UNM IT and the Basic Needs Project to further develop and enterprise a food recovery app called LoboEats. The app was conceived by Dr. Sarita Cargas and created by UNM Computer Science alumnae, Biraj Silwal. It won first place in the 2022 UNM & Central New Mexico (CNM) App Contest. UNM Food collaborated with UCAM to develop marketing materials and a visual identity for the app.

- Launching Fall 2023
- Allows UNM event organizers to post when there is excess food after an event
- Lobos log in to the app using their UNM credential
- Users are notified when there is food available on campus
- Reduces food waste and supports food insecure Lobos

Sustainability Communication and Reporting

The dining program has strived to expand their sustainable initiatives in recent years and anticipate emerging industry trends and opportunities that can be applied to UNM. As those programs develop it has become apparent that our diners want to see our progress and understand the impact that it is having. UNM Food will be adding a sustainability section to our website, food.unm.edu to offer our audience insights into categories such as food recovery, reduction of single use plastics, locally sourced food and partnerships, recycling, composting, and energy efficiency. Lobo Energy is utilizing monthly reports generated by UNM Food to populate an online dashboard.

First Year Meal Plan Experience

A continued focus will be placed on the creating meal plans and dining programming that supports first year residents. Value, nutrition, and community have always been tenants of ours, but the preferred flavors and modality of our program must evolve to suit current and future students. Information gleaned from student feedback will be used to support modifications made to the menus, dining styles, technology, and community experiences.

Capital Improvements to Key Dining Locations

Dining locations such as the Student Union Building, La Posada Dining Hall, and Student Residence Commons are due for updates. The improvements will incorporate upgrades to facilities in terms of aesthetics, equipment, and infrastructure that allow UNM Food to be an asset toward recruitment and retention.

New Foodservice Contract

UNM Food will select a supplier, negotiate, and execute a foodservice contract in the next year. This contract will be designed to support a dining portfolio and program that reflects the unique needs and preferences of the campus community. One of the most important aspects of this agreement will be the incorporation of programmatic goals and key performance indicators, which will allow both the supplier and the contract administrator to maintain accountability, measure progress, and make any necessary adjustments that will best serve the UNM community.

Appendix E:

UNM Golf

Courses

Mission and Vision

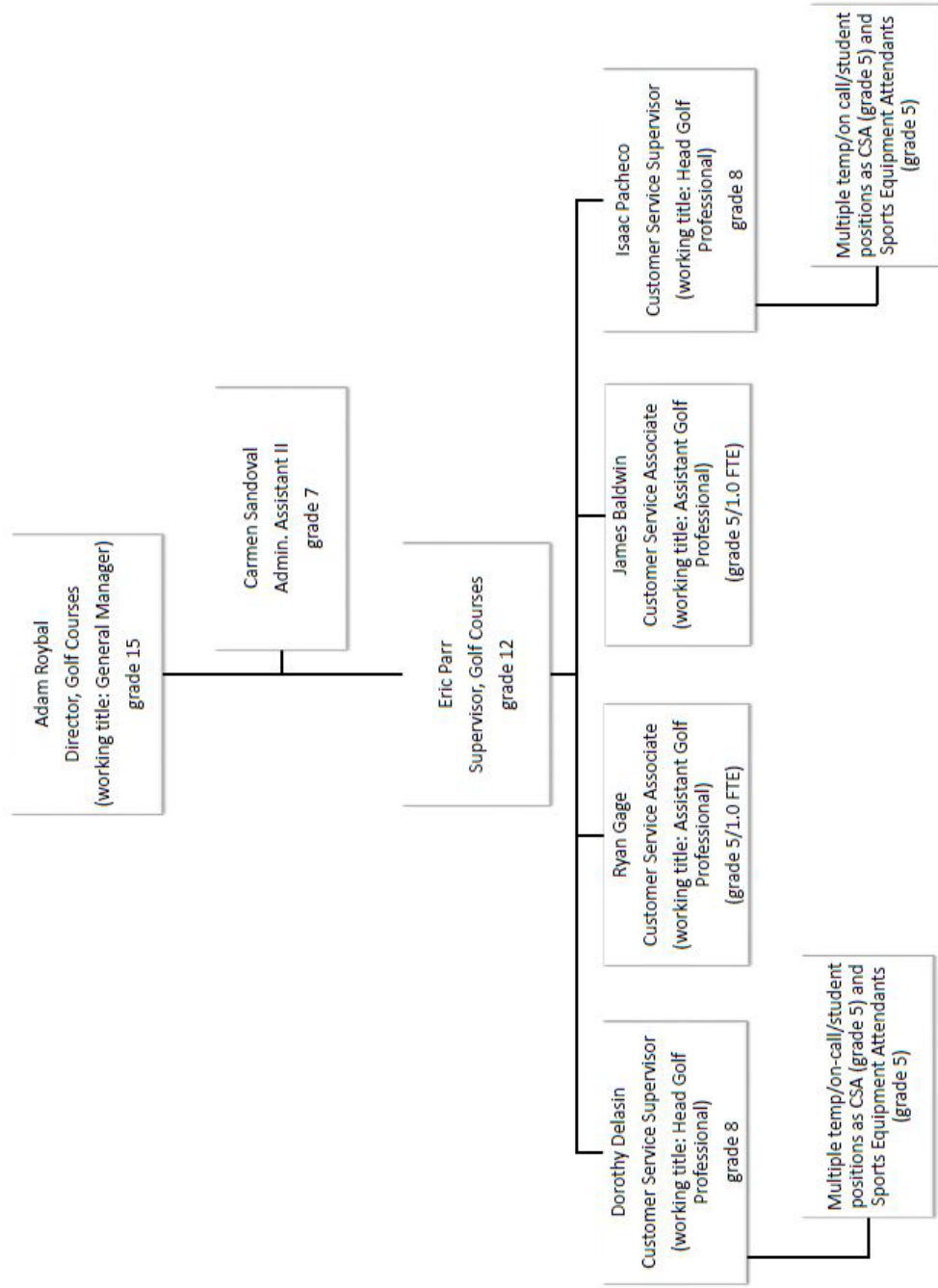
Mission

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.

Vision

Be the best golf courses in New Mexico.

Organizational Chart



i. EXECUTIVE SUMMARY

The University of New Mexico (UNM) Golf Courses has seen a resurgence in the popularity of golf that has been positive for our operations. UNM Golf Courses continue to support, enhance, sustain, and retain the variety of recreational opportunities offered to students, staff, faculty, alumni, guests, patrons and the public. In FY23 the UNM Golf Courses were over budget and over prior year for total operating revenues, however the golf industry is one of the few industries that has been positively impacted since the COVID-19 pandemic.

- Rounds of golf played at the UNM Golf Courses:
 - FY22 77,743
 - FY23 76,778
 - Variance 965 Rounds
 - Percentage 1% Decrease
- Rounds of golf played at the Championship Golf Course:
 - FY22 36,705
 - FY23 35,102
 - Variance 1,603 Rounds
 - Percentage 4% Decrease
- Rounds of golf played at the North Golf Course:
 - FY22 41,038
 - FY23 41,676
 - Variance 638 Rounds
 - Percentage 2% Increase
- Total revenue at the UNM Golf Courses:
 - FY22 \$2,649,329
 - FY23 \$2,667,874
 - Variance \$18,545
 - Percentage 10% Increase
- Total revenue at the Championship Golf Course:
 - FY22 \$1,809,951
 - FY23 \$1,798,902
 - Variance \$11,049

- Percentage 10% Decrease
- Total revenue at the North Golf Course:
 - FY22 \$839,377
 - FY23 \$868,971
 - Variance \$29,594
 - Percentage 10% Increase

UNM Golf Courses continues to collaborate with UNM Recreational Services to provide a Tuition Remission eligible benefit opportunity for golfers to enjoy 24 rounds of golf the North Golf Course. This has not only been a great addition to our revenue stream but allows UNM Golf Courses to showcase our course and promotes the game of golf to all that are interested.

At the beginning of the calendar year 2023, UNM Golf Courses began reviewing our organizational structure, as well as position job descriptions and titles to better align with the golf industry standards. As these progress, our goal is to have the associate director of Golf Course to assist the director with operations and leadership of both courses and have staff align with the correct position, title, and compensation.

ii. SIGNIFICANT ACCOMPLISHMENTS

The UNM Golf Courses continue forward to its current mission and vision of being the best 9-hole and 18-hole golf course in the state of New Mexico. As the Flagship University we are proud to provide excellent services to everyone visiting our facilities. We provide an essential mental and physical well-being recreational activity to all.

The UNM Championship Course continues supporting our Athletic department at zero expense. We are the home course for both men's and women's golf teams including locker rooms, offices, indoor/outdoor practice facilities, green fees, golf carts, range balls, and excellent course conditions for our student athletes. We host both UNM golf teams' intercollegiate tournaments every September, also at gratis. Furthermore, the UNM Championship Course supports our golf teams by hosting a variety of their fundraising events such as the Men's Top 100 golf tournament, Lobo Junior Camp, Ladies Birdie Club, and Lady Lobo Golf Clinics all at a cost absorbed by the UNM Championship Course.

In addition to the Athletic department, we are proud to support other UNM departments as well, hosting fundraising events with UNM Lobothon, UNM Law School, UNM Pharmacy, UNM Children's Cancer Foundation, UNM Children's Hospital, and other annual golf tournaments.

Locally, the UNM Championship Golf Course has continually hosted the United States Golf Association Qualifiers (US Junior Amateur, US Amateur, US Mid-Amateur, Junior PGA, and the US Open Qualifier). Sun Country Golf Association has been able to rely on the Championship Course for other qualifying events such as Drive, Chip and Putt. We support many open tournament fundraisers benefiting our community and military families.

The Championship Golf Course hosted the second stage qualifying school for the Professional Golf Association (PGA) Tour in October 2022. The Championship Golf Course played host to the Veteran's Golfers Association, a National Qualifier for the western region. In hosting these events with our local qualifiers, our course isn't just a local destination; it is high on the radar for a golf tourist destination.

Lastly, UNM Golf Courses was able to showcase our golf courses by having the International Association for College Admission Counseling (ACAC) Conference golf tournament at our Championship Golf Course. The UNM Championship Golf Course is ranked the 18th best campus golf course in the country according to Golfweek magazine.

The North Golf Course continues to provide a unique multi-use venue for golf, open space, UNM cross county, neighborhood associations, and the UNM community as a whole. We hosted the Junior Sun Country Golf Association tournaments, as well as local senior association golf events, and the North and Netherwood Neighborhood Association events. The golf course provides excellent conditions that are challenging and unique in its layout. The North Golf Course provides multi-use recreation opportunities, as we hosted UNM Cross Country and the ACAC 5k runs (Appendix).

We continue to plan future operations as a golf course, with the perimeter as open space. Although we support the Neighborhood Associations, we also have a responsibility to protect the golf course and golfers while providing a safe environment for everyone.

iii. FUTURE PLANS

Championship Golf Course

UNM Golf Courses will continue to provide a Championship Golf Course to our UNM student athletes can train, practice, and play to prepare for any of their upcoming competitions, including hosting championships for their needs and future. We will continue to provide New Mexicans, UNM stakeholders, and everyone playing the golf course from around the globe the best golf course possible. The Championship Golf Course will work to maintain high rankings in national publications as well as being selected from the National Collegiate

Athletic Association (NCAA), Professional Golfers Association of America, PGA TOUR, national and international associations as host to their championship events.

In collaboration with UNM Food and Planning, Design & Construction (PDC), discussions regarding improvements to the Championship Golf Course Pavilion and the Lobo Grill have begun. Improvements that are being considered to the facility include those in the Lobo Grill, with construction beginning in FY24.

North Golf Course

UNM Golf Courses will persist to provide New Mexicans, as well as UNM stakeholders an excellent option for outdoor recreation at the North Golf Course. We will continue to work with Bernalillo County and the Neighborhood Associations to preserve the golf course for its patrons and maintain the perimeter walking trail for all those who enjoy it. Lastly, regenerating the long-standing tradition the North Golf Course holds in the community as a golf course, while protecting and providing a safe-use space to the golfers and trail users in that multiuse area.

- iv. **Attachment A:** International Association for College Admission Counseling (ACAC) Conference website link <https://intlacac.unm.edu/>

Appendix F:

LoboCard Office

Mission and Vision

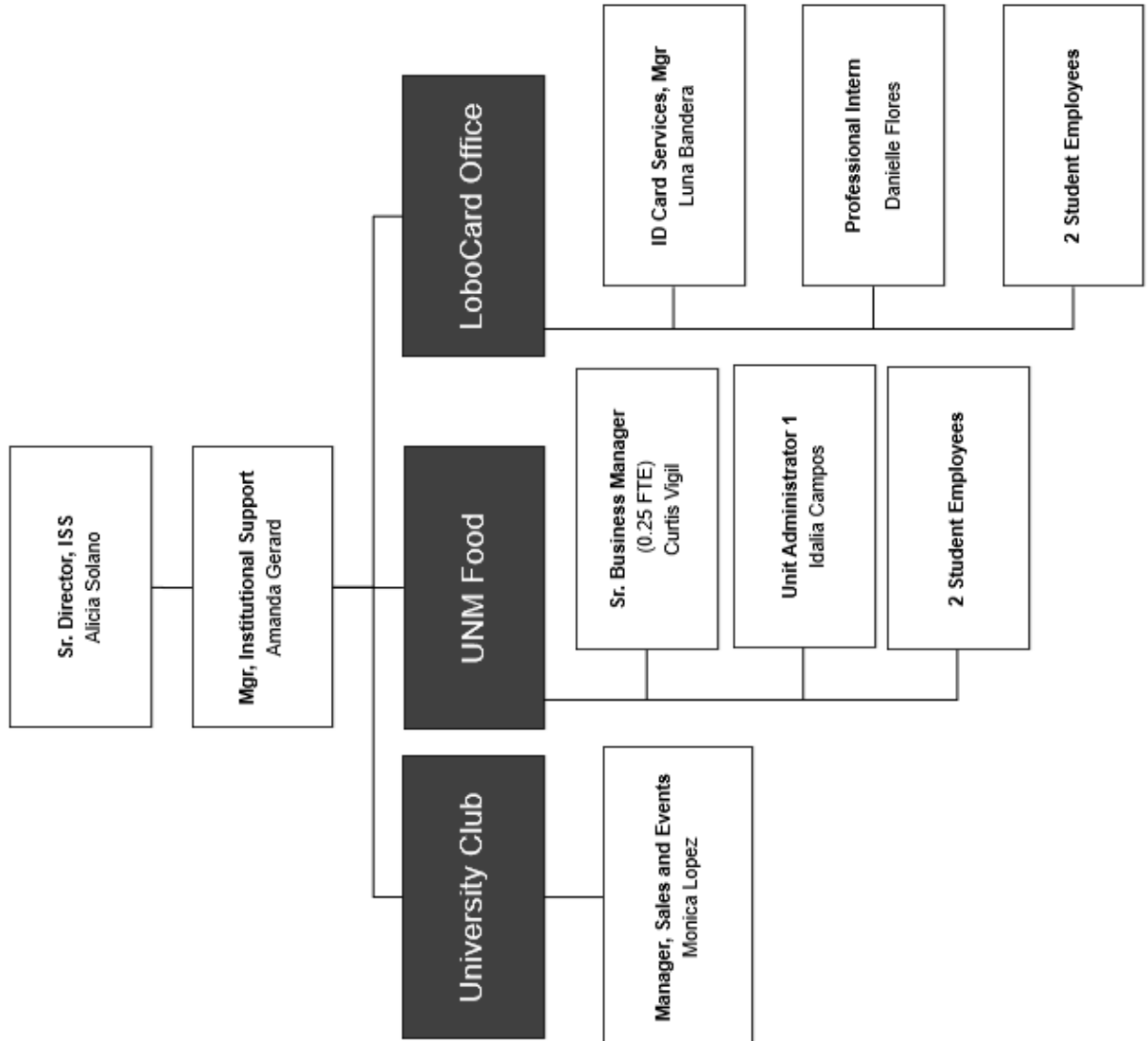
Mission

The LoboCard Office is committed to providing the University community with a connection to campus life and enhancing each student's learning experience.

Vision

The University of New Mexico LoboCard Office is focused on maintaining the highest standards set forth in the technology field for higher education carding systems. The LoboCard Office is and will continue utilizing the most advanced technologies to give each student access to their educational environment, recreational venues, and our on-campus eateries to help with their academic success.

Organizational Chart



i. EXECUTIVE SUMMARY

The LoboCard Office operates on a \$288K annual budget, which includes \$175K of support from the University of New Mexico's (UNM) budget office. The LoboCard Office operates with two full-time employees and three student employees to operate our front counter customer transactions, along with operating the meal plan program assignments to the University students and community, which is financially supported by Food Service of up to \$51K annually. Additional revenue is self-generating through the operation of the LoboCash program, which allows for the University community to purchase food, supplies and apparel at various location on and off campus. The LoboCard Office receives a commission on each LoboCash sale of any merchandise or food sold from the participating retail locations. Also, part of the LoboCard budget is revenue generated through UNM ID replacement cards. The LoboCard Office issued over 1,500 replacement cards, which produced approximately \$47K worth of revenue for our operational budget.

As we continue to move forward and keep up with the new technology standards and provide the best service possible to our faculty, staff and students, the LoboCard Office must be prepared financially to consider current and future capital purchases, which means building a solid capital reserve and revisiting funding allocations.

ii. SIGNIFICANT ACCOMPLISHMENTS

Office Reorganization

The LoboCard Office has undergone significant changes to both personnel and software/technology in the last five years. There have also been structural changes in the Food Service office that have had an impact of what the current and future needs are to keep our operation running efficiently, while providing outstanding service to our campus. A new manager was promoted from the current team and a professional intern was added to support the needs of the office. The new structure has been very successful and created opportunities for the office to retain institutional knowledge through staff and student employee retention.

Improved Processes for New Student Orientation (NSO)

The LoboCard Office made operational adjustments and improvements to better serve the students attending NSO throughout the summer. Recent years had seen better experiences with our office due to online photo submission and our office preprinting the cards to expedite lines. This year, the LoboCard office relocated pickup to the housing check-in where NSO attendees visit first. This

change eliminated the need for many students to stop by the LoboCard Office. It also benefited students who needed to visit the office by providing them with clear instructions on where and how to obtain their LoboCard. The adjustments improved student's experiences by expediting service and strengthened their first impressions of UNM.

Meal Plan Processing Improvements

The LoboCard Office has a second year of experience with the new meal plan software, Atrium. With that additional experience, the meal plan process has been solidified and streamlined into something that is now standardized and efficient. Meal Plan auditing, sign ups, cancellation, and auto assignments processes have been defined in Standard Operation Procedures (SOP's). First Year Required (FYR) tagging has been automated and set up with all FYR criteria for real time FYR assignments/cancellations. This has resulted in a straightforward process that can be repeated by anyone following the SOP. That means the auditing and meal plan set up for new semesters/ fiscal years is repeatable in process, resulting in consistency and accuracy in findings and assignments. This has almost eliminated mistakes in billing and sign ups, and has greatly reduced the amount of email inquiries and confusion.

Streamlined Daily and Monthly Financial Reporting

The financial reports completed daily and monthly have been completely digitalized and streamlined in process. Atrium daily and monthly sales reports have been automated to run on schedule and are auto emailed to the appropriate departments. Tracking spreadsheets have been updated and consolidated for a higher level of organization and ease in tracking. SOP's for every process have been written and compiled with other related processes for straightforward operations. All reconciled documents and records are saved digitally and archived in the share drive. This has resulted in daily and monthly reporting being completed faster and more efficiently than ever before and allows processes to be done by others in the office by following set SOP's. The use of paper and physical archive space has been cut down significantly.

iii. FUTURE PLANS

New Badging Software

In conjunction with UNM IT, the LoboCard Office is currently monitoring various vendors to operate the UNM Badging Software on an independent level. This

will allow for more flexibility in the reporting fields and a more robust badging system in issuing the UNM credential through our office.

Mobile Credentials

The LoboCard Office has been developing a very close working relationship with the Security Office, UNM Police, and UNM IT to move the Lobo Card onto a mobile cellular device, which is becoming the industry standard for security purposes. This will eventually eliminate the need for a physical Lobo Card to be carried by faculty, staff and students for identification and access across campus. Research, cost analysis, and collaboration is on-going.

Streamlined Move-In Experience for New Students

There is an opportunity to improve the move-in experience for resident Lobos by making operational changes to the standard drive-through, check-in process. The LoboCard Office will work with Residence Life Student Housing (RLSH) and NSO to cross reference residents and NSO attendees with online photo submission records to preprint cards that were not picked up due to virtual NSO session attendance. Those ID cards will be issued with housing assignments to expedite the move-in process for students and families.

The LoboCard Office is also exploring adding equipment that would allow them to set up a temporary satellite ID station in the Student Residence Commons during move in that would alleviate the need to send patrons to the SUB. A portable camera, workstation, and printer would allow a more flexible service component that improves the move in experience and alleviates stress for new Lobos.

Increase Professional Network of Institutional and Industry Resources

Establishing connections with professional organizations and cultivating a network of institutional and industry experts would yield significant benefits for the LoboCard Office. Our office has experienced a loss of institutional knowledge in recent years, as have many other institutions post pandemic, and it has become crucial to connect with other experienced professionals to share ideas and knowledge. Additionally, the industry is introducing new technological solutions that could enhance the experience at UNM but may come with challenges that other schools have encountered.

Appendix G: New Mexico PBS/ KNME

Mission and Vision

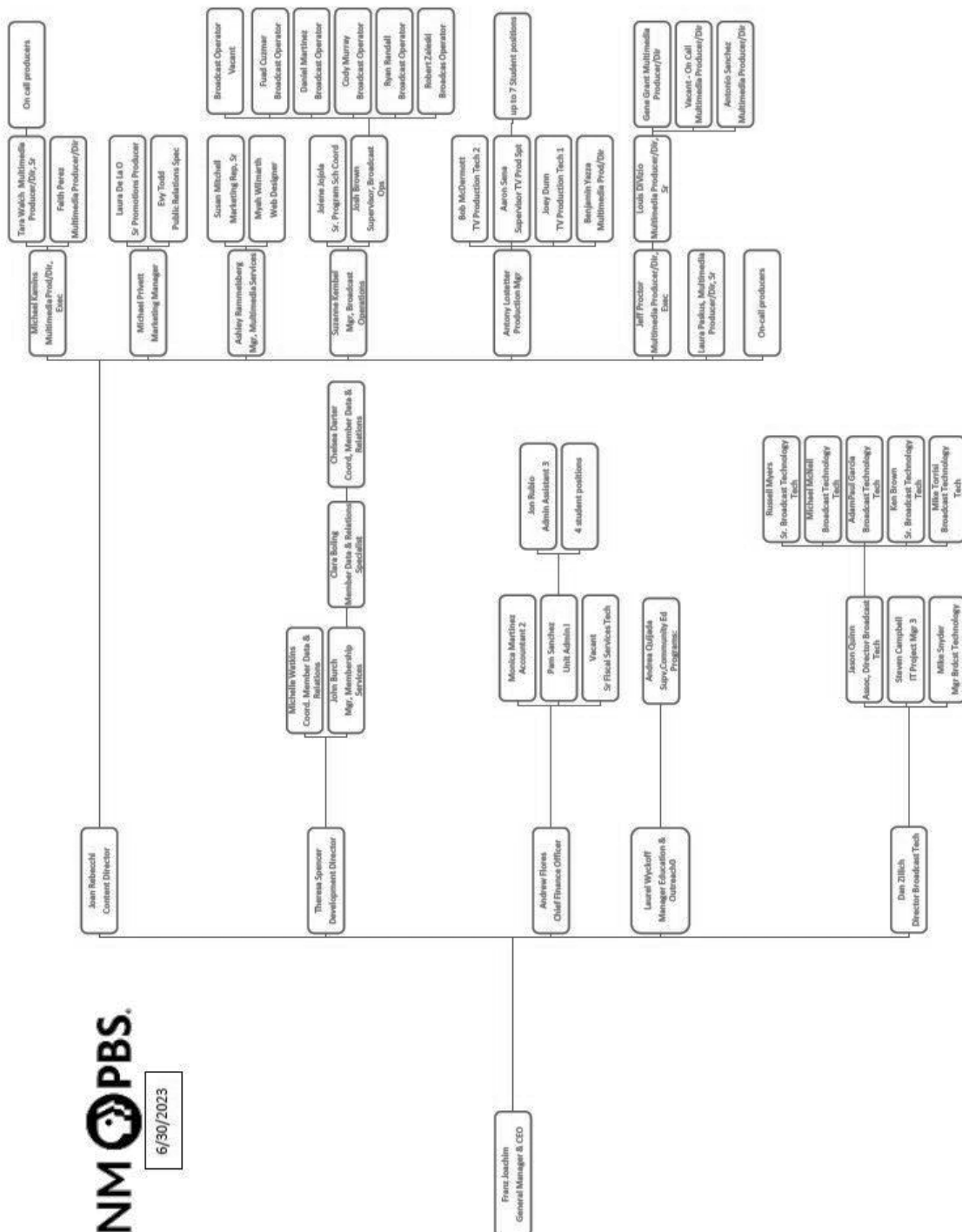
Mission

New Mexico Public Broadcasting Service's (NMPBS) mission is to inform, engage, educate, and connect New Mexico's diverse communities, reflecting their interests and needs through quality programming, services, and online 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



i. EXECUTIVE SUMMARY

Our viewers enjoy a variety of enriching, inspiring and entertaining content across almost every platform available. Our members enjoy unparalleled access to all the content they love, as well as to our premiere member services team to help them navigate our many opportunities. New Mexico Public Broadcasting System (NMPBS) offers a wealth of unique and valuable opportunities to all of our stakeholders. We are living up to our mission of providing the best content anywhere, anytime. Our fellow citizens enjoy the fruits of statewide cooperation with our fellow public broadcasters, creating and delivering highly enriching and educational content to their children in the safety of their homes. Our educators realize a valuable partner in providing the best and most academically rigorous tools for helping them improve our student's outcomes. Our faculty members enjoy access to research opportunities, to grant funding, and to unique technical platforms with which to carry out their work.

- We continue to serve our diverse communities in unique ways.
 - Leveraging our technological strength to lead the state, we continue to build on two significant advancements that position us a leader in the national transition in broadcast technology. We began broadcasting in ATSC3.0 in July 2021. Now we are working with equipment manufacturers to put the nation's first ATSC3.0 Translator into service. This will extend our ATSC3.0 footprint out to the Navajo Nation.
 - In October 2021, we began our Datacasting for Education services, proving that using our broadcast signal to get internet content to homes that do not have the internet, works and is scalable. Now we are applying for a large FEMA grant to use this Datacasting service to streamline the emergency alerting system throughout the state.
 - We continue to serve in many other ways. We continue to grow the *Our Land* environmental series and are launching a second season of our digital first series, *Indigi-Genius*. This season of *Indigi-Genius* is funded by PBS digital and will be part of PBS national offerings.
 - Both *Our Land* and *Indigi-Genius* are being adapted by education professionals for inclusion into NMPBS LearningMedia, making them available as course content for students across the state.

- We continue to grow our distribution business and are now the second largest distributor of television programs to public television stations, second only to PBS itself.
 - NMPBS secured a contract as the distributor of daily English language international news programs for Deutsche Welle, the German analog to PBS.
 - Distribution also secured a new year of services with Democracy Now, a daily news program we offer to all Public Television stations.
 - We continue to provide distribution services for most programming coming from BBC Syndication.
- We expected and planned for a downturn in the economy. Despite our predictions the economy and the stock market continue to perform well.
 - In FY23 membership dollars remained steady with the last two fiscal years, with total contributions of \$4,319,159 from 27,000 donors.
 - Underwriting (corporate support sponsorships) saw an increase of \$61,000 in annual sales in FY23 (\$308,554) as compared to FY22 (\$247,479).
 - Individual donors continue to fund almost 50% of the station's annual operating budget, showing their appreciation for the station's quality content. In FY23, NMPBS had its highest-grossing year in estate giving at \$1,262,937 realized revenue from 11 donors. Our story is one of cautious optimism, mirroring the nation's steady recovery from the last few years.

	FY23 Budget	YTD Budget	YTD Actuals	% of YTD Budget	PY Actuals FY22
Revenues:					
1 Corporation for Public Broadcasting grants	\$ 2,897,160	\$ 2,295,200	\$ 2,270,573	-1.1%	\$ 2,665,542
2 State Appropriation	1,051,800	1,051,800	1,051,800	0.0%	1,026,600
3 Gifts/Memberships	5,145,215	5,690,215	5,779,478	1.6%	5,461,745
4 Corporate Support	175,000	241,340	260,414	7.9%	202,935
5 Broadcast Production	152,000	295,505	314,465	6.4%	250,313
6 Translator Leases	82,310	96,380	96,938	0.6%	94,451
7 APS operational support	20,000	20,000	20,000	0.0%	20,000
8 Educ & Outreach	12,725	22,725	25,491	12.2%	12,440
9 Use of reserves/misc	244,762	205,762	222,686	8.2%	(625,524)
Total Revenues	\$9,780,972	\$9,918,927	\$10,041,845	1.2%	\$9,108,502
Operating Expenses:					
10 Personnel	\$ 4,730,989	\$ 4,255,000	\$ 4,313,366	1.4%	\$ 3,700,752
11 Fundraising	990,022	1,100,022	1,123,277	2.1%	1,121,343
12 Broadcast Program Acquisition	1,280,950	1,283,800	1,305,833	1.7%	1,345,804
13 Promotions	377,559	230,000	229,566	-0.2%	249,095
14 Professional Services	496,142	388,142	326,126	-16.0%	495,428
15 Telecommunications	63,869	61,300	56,701	-7.5%	57,060
16 Travel and Prof Dev	59,834	76,809	77,794	1.3%	25,042
17 Equipment and support	909,258	114,000	98,079	-14.0%	150,367
18 IT software and support	262,500	202,850	195,245	-3.7%	260,725
19 Translator sites	71,990	62,600	64,676	3.3%	54,329
20 Repairs and Maintenance	342,450	47,700	47,537	-0.3%	553,463
21 Automotive	17,064	26,014	28,857	10.9%	14,211
22 Office Supplies	19,208	7,975	8,013	0.5%	19,145
23 Dues and Memberships	67,875	67,875	68,758	1.3%	63,917
24 Bad Debt Exp	22,000	(1,000)	(720)	-28.0%	83,067
25 Other Operating Exp	137,220	36,400	31,822	-12.6%	98,356
26 Taxes and Fees	48,000	48,000	48,117	0.2%	46,108
Total Operating Expenses	\$9,896,930	\$8,007,486	\$8,023,047	0.2%	\$8,338,212
27 Transfer to (from) other fund types	\$ 115,958	\$ (1,911,441)	\$ (1,716,737)	-10.2%	\$ (1,222,566)
Total Expenses	\$9,780,972	\$9,918,927	\$9,739,784	-1.8%	\$9,560,778
Profit (Loss)	\$0	\$0	\$302,061		-\$452,276
Fund Balance 6/30/23	\$ 540,271		Plant Balance 06/30/23		\$ 4,278,854

ii. SIGNIFICANT ACCOMPLISHMENTS

- NMPBS has installed a new on-air automation system. The on-air automation system is what controls what viewers see every second of every day on five different streams over the air, on satellite, on cable, and on streaming services. On-air automation allows all these services to be managed by one operator on duty.
 - This new system has the capability of being a disaster recovery plan for KNME, KRWG, and KENW in case one of the master controls has had a complete failure, broadcasting could be done from one of the other stations.
 - The new system is operational and on the air.
- In FY23, NMPBS Development had its highest-grossing year. Estate giving realized \$1,262,937 revenue from 11 donors.
 - The station is now reaping the benefits of its previous decade of work—hosting multiple planned giving seminars, airing numerous planned giving awareness spots, and providing donors a free online tool to create an estate plan—in cultivating these gifts.
- Antiques Roadshow came to Santa Fe on June 14, 2022, to film three episodes for the 2023 season.
 - This is the 4th time that Antiques Roadshow has produced their show with NMPBS.
 - These three Santa Fe episodes aired nationally on January 23, January 30, and February 7, 2023.
- NMPBS co-hosted Daniel Tiger Be My Neighbor Day at ¡Explora!
 - A diverse crowd of 1,231 children and adults came to take photos with Daniel Tiger and participate in day-long events.
 - Collaborators included
 - The Coalition for Science Learning in Early Childhood
 - Cuidando Los Niños
 - PNC Bank
 - Bernalillo County Home Visiting Work Group
 - UNM Hospital,
 - Youth Development, Inc. (YDI) Nurse Family Partnership
 - Read to Me
 - NM Early Childhood Care and Education Department
 - Central New Mexico (CNM) Department of Education

This is an excellent example of NMPBS's facility to foster partnerships and drive substantive change.

- NMPBS is the second largest distributor of television programming to public television stations in the country; PBS is the largest. This means that except for PBS public television stations receive more programming every day from NMPBS than anyone else.
 - Through our shepherding of the PBS sIX Interconnection system, our position as the Alpha Test station for sIX, our leadership in the national rollout of this revolutionary system, NMPBS built a successful business model that has succeeded well beyond our expectations.

iii. FUTURE PLANS

- Building on the success of our launch of ATSC3.0 NextGen TV services in New Mexico, we are working to expand the footprint of this new technology.
 - NMPBS is working with multiple equipment manufacturers to build prototype low-power transmitters to extend our signal to rural New Mexico.
 - We have secured spectrum to launch new services in Farmington and Taos.
 - We are monitoring Federal Communications Commission (FCC) activity to secure more channels with the intention of replicating the ATSC1.0 low-power translator network currently serving KNME.
 - We are meeting with village administrators in Carrizozo to discuss a pilot project to transition an entire community away from ATSC1.0 to ATSC3.0. We have international partners in this effort.
- NMPBS has completed a large project that created an archive of all the digital media assets at three New Mexico public television stations and five New Mexico public radio stations.
 - These digital assets are now part of the Library of Congress and the New Mexico State Archives.
 - NMPBS seeks to build out our own portal that we can access directly. We are seeking cloud services to build and house a portal that would make all of these digital assets available at no cost, to researchers, students, independent producers, and our own employees.
 - We are working with other public television stations around the country to secure the cloud storage space at a minimal cost.

Appendix H: Parking & Transportation Services (PATs)

Mission and Vision

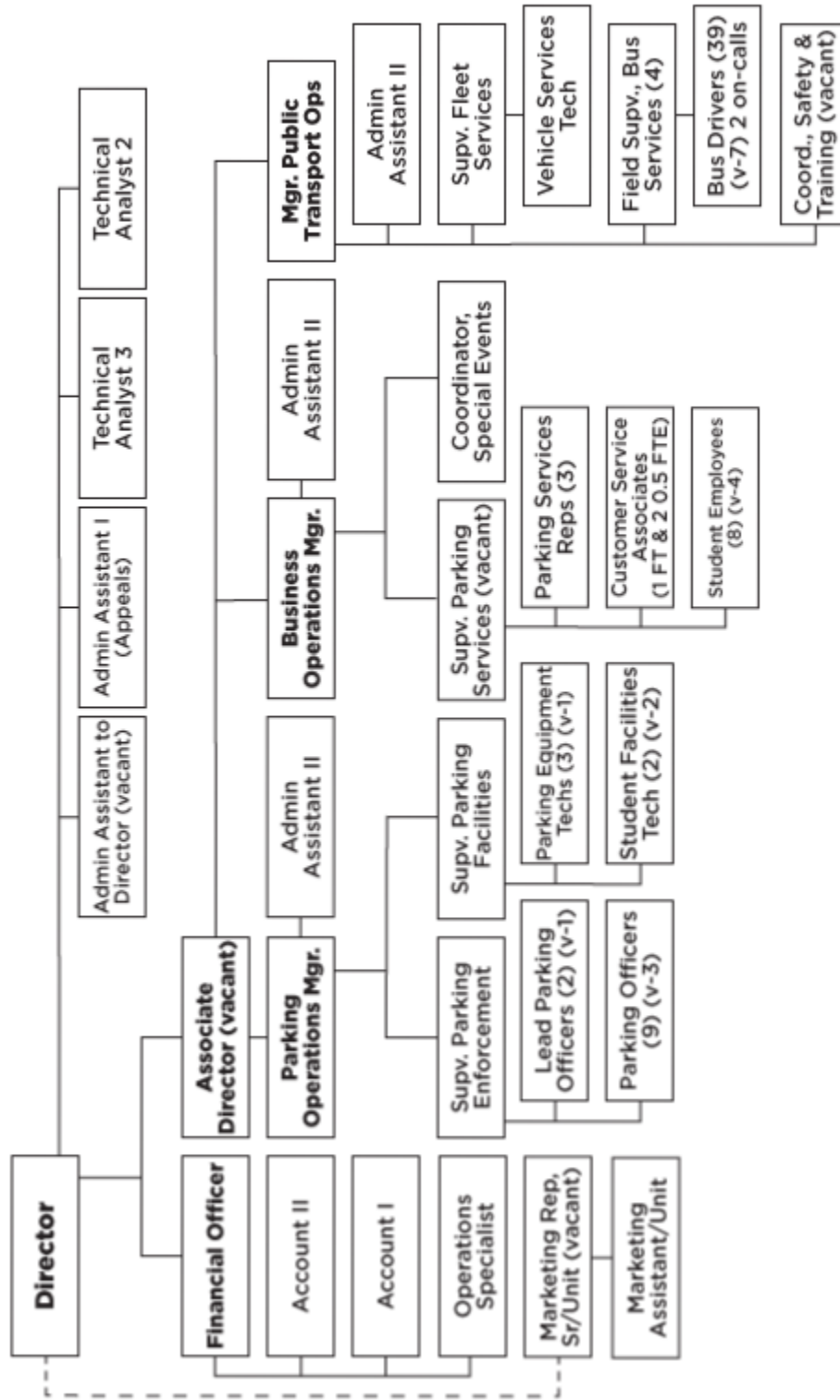
Mission

Parking and Transportation Services supports the University's education, research, and service missions by providing access to key programs for faculty, staff, students, and visitors through a variety of parking and 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; and demonstrating effective stewardship for our natural environment.

Organizational Chart



Abbreviations

(v-#) = vacant position(s)

Supv. = Supervisor

Mgr. = Manager

Sr. = Senior

Coord. = Coordinator

Last Updated: 6.30.2023



i. EXECUTIVE SUMMARY

Parking & Transportation Services (PATs) is a self-funded auxiliary department of The University of New Mexico (UNM) that functions under Institutional Support Services (ISS). With over 44,000 students, staff, and faculty coming to the UNM Albuquerque campus on a regular basis, and over 77,000 people traveling to the University-area on a regular basis, our system is designed to provide reliable and orderly access to the campus. Our responsibility, encompassed in our mission, is to 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. This responsibility includes managing approximately 14,000 parking spaces, facilitating the movement of 1.7 million passengers annually from nearby parking lots onto campus and around campus, and providing a full range of transportation choices through the provision of the alternative transportation programs. The revenue we generate is reinvested in providing our services.

A dedicated team of about 80 student and staff employees carry out our day-to-day operations. PATs strives to provide quality parking and transportation services to the faculty, staff, students, patients, and visitors of the University as well as the Albuquerque community. Our parking operations include the distribution and regulation of daily, permitted, and event parking, as well as the maintenance of parking lots and garages. Services offered include permit parking, pay station (visitor) parking, shuttle services, and alternative transportation programs that include but are not limited to the Bike Locker Program, Lobo Bikes, and Electric Vehicle (EV) charging stations.

In FY23, the University continued to adjust to the “new normal” following the COVID-19 pandemic. PATs was successful with continuing to meet our customer's needs with minimal disruption of services. As with many departments, this “new normal” created an ongoing issue with our recruitment and hiring process. There continued to be a problem with getting applicants to respond to requests for interviews and, when offered a position, getting the candidate to accept the position.

PATs continued to innovate its permit/parking services to an on-line platform, with a focus on providing quality customer service. For faculty and staff members whose work did not require them to be physically on campus on a regular basis, and who therefore did not need an annual parking permit, PATs continued to expand on the “Pay-By-Day” parking program where eligible faculty and staff were authorized to park in designated surface lot spaces by simply logging into a smartphone application (ParkMobile) and paying a flat-rate fee for the day. PATs also continued to offer Employee one-day

“scratcher” permit program for use in lieu of an annual parking permit. These two programs are slowly gaining increased use.

In FY23, PATS sold 15,805 2022 permits and 44,242 total parking permits to faculty, staff, students, visitors, and vendors. PATS experienced a significant increase to special event revenue in FY23 (\$500,246) from FY22 (\$310,484) (e.g. Popejoy, Lobo Triathlon, etc.).

• <u>Revenues -</u>	
○ Permits	\$ 5,452,218
○ Permits/Yale structure	\$ 894,211
○ Pay station parking/surface lots	\$ 894,085
○ Pay station parking/Cornell structure	\$ 843,151
○ Event Revenue	\$ 500,246
○ Citation fines	\$ 818,314
○ Other Income (includes parking loss rev)	\$ 455
	Total: \$ 9,402,680
• <u>Expenses -</u>	
○ Personnel	\$ 4,683,090
○ Taxes/Fees	\$ 864,385
○ Operating Costs	\$ 929,593
○ Transportation Costs (repairs, fuel, insur.)	\$ 858,491
○ Infrastructure Costs	\$ 85,912
○ Debt Service	\$ 1,638,892
○ Transfers Out (Real Estate, Athletics)	\$ 100,000
○ Capital Expenditures	\$ 563,979
	Total: \$ 9,724,342

(\$120,426 Operating Gain w/out
reserve carryforward from COVID \$)

ii. SIGNIFICANT ACCOMPLISHMENTS

Business Operations

- Reserved Permits revenue totaled approximately \$1,020,000.
- Alternative Transportation - Bike Locker program leased 81 bike lockers. This reflects an 86% leased rate.

Customer Service

- PATS Business office staff answered over 14,400 incoming calls and placed over 1,600 outgoing calls.

- PATS Business office staff fulfilled 292 temporary permit orders for UNM departments. The total number of temporary permits issued was 17,058.

Notable Events

- Collaborated with Residence Life Student Housing (RLSH) and American Campus Communities (ACC) Casas del Rio for the six-day drive-thru move-in process for resident students.
- Collaborated with City of Albuquerque (CABQ) for the Twinkle Light Parade Park and Ride
- Collaborated with CABQ and UNM Health Exercise & Sports Science to host the Lobo Triathlon.
- Collaborated with CABQ for the Route 66 Summerfest Park and Ride
- Collaborated with Popejoy Hall to provide parking and transportation services for 91 events
- Provided parking services for the following major UNM Events:
 - International Association for College Admission Counseling (International ACAC)
 - Hanging of the Greens
 - Red Rally
 - UNM Football shuttles for all home games
 - First Year Family Day
 - Enrollment Management Senior Days
 - Nizhoni Days Pow Wow

Special Events Parking Services

- Provided parking services (traffic control, vouchered parking, parking attendants, parking codes etc.) for over 710 special events which resulted in revenue earnings of \$500,246.00.
 - 12,006 parking codes were used for the structure pay stations with an approximate value of \$99,300.

Finance

- PATS contributed \$121,891 to ISS' capital program and UNM-funding. PATS also contributed approximately \$277,185 in "In-Kind" (goodwill) services.

Information Technology

- Switched from an amount-based payment plan to code-based which allowed Payroll to automatically change customer payments between biweekly and monthly deduction amounts.

- Added dorm resident data to the student data feed to alleviate the need for communication with RLSH and Casas del Rio dorm residents.
- Eliminated the need for the automatic printing of Flowbird pay-and-display transaction receipts to reduce litter on campus.
- Initiated “Pay-By-Plate” payment options on Flowbird and T2 System pay station machines and updated enforcement processes using test locations and machines.
- Created a web application for vehicle license plate focused patient parking permits for use at any University of New Mexico Hospital (UNMH) facility. Users, which include Senior Health Clinic, Movement Disorder Clinic, and clinics within Family Practice, may issue an electronic patient permit to customers scheduled to meet with providers at their facilities.
- Created sales processes for the new “student-only” parking lot at the old Elks Club property designated as the K lot.
- Built “Pay-by-Day” permit program in T2-Flex (parking software system). Started a new permit sales opportunity for faculty and staff that mostly work from home, allowing for pre-qualified faculty and staff customers, without annual permits, to purchase parking in various convenient locations by the day, at a fixed rate, and enforced using plate recognition software on the mobile enforcement application.
- Updated firmware and software on twenty-three Digital pay stations to move from 3G, which was being shut down, to 4G and server security certificate update.
- Upgraded and updated twenty-eight Flowbird/Parkeon pay stations to Eurocard, Mastercard, Visa (EMV) Purchasing Card Industry (PCI) standard specification.

Communication And Marketing

- Continued to work more directly with ISS Marking & Communication to implement an effective communications approval process.
- Continued to work with UNM Communication and Marketing to incorporate UNM Brand Guidelines in all promotional materials produced by our department.
- Continued the effort to expand communication/outreach efforts to customers and visitors to UNM regarding lot closures, shuttle service, disruption/detours, campus events that may affect parking and/or traffic flow, etc.

- Presented department overviews at virtual and “in-person” orientations and tabling events (including student resource fairs, New Employee Experiences (NEE/Lobo U), New Student Orientations (NSO), Transfer and Non-Traditional Student Orientations, and Family Connection Orientations).
- Maintained and updated information on PATS’ website including permit rate and eligibility information, parking and shuttle service maps, and created/updated various forms, flyers, and other informational materials for the department’s internal and external use.
- Produced temporary dashboard passes for use by UNM Departments, UNM/UNMH construction project parking utilizing UNM lots, and UNM Special Events that required temporary parking permits.

Parking Operations

PATS Enforcement

- In FY23, a total of 31,359 citations and 8,157 warnings were issued by enforcement personnel, for a total of 39,516 citations. The most frequent violations were:
 - Failure to Display a Valid Permit – 16,437 (42%)
 - Pay Station Violation – 12,742 (32%)
 - Permit Invalid for Zone – 5,087 (13%)

UNM PATS’ on-going “Accessible Parking Initiative” is designed to better ensure the availability of designated Accessible (ADA) parking spaces on the campus for use by legitimate users. As part of this initiative, UNM PATS Enforcement Officers performs periodic “focused enforcement” events on the campus. These events are meant to ensure applicable State of New Mexico and University Parking Regulations and laws pertaining to the appropriate use of ADA parking spaces on the UNM campuses are being followed. During these events, Enforcement Officers will ask for accessible parking placards and photo IDs to confirm ownership. Accessible parking placards held by customers and found to be out-of-compliance with state laws and UNM Parking Regulations (unauthorized and/or illegal use) are confiscated and returned to the NM MVD when the legitimate owner of the accessible parking placard fails to report to the PATS Business Office and provide proof of ownership.

- Three (3) “Focused Enforcement” activities were performed during FY23 with the following results:
 - Valid placards displayed – 41
 - Invalid placards displayed – 5
 - Confiscated Invalid placards – 1

PATS Facilities

- PATS Facilities is responsible for the maintenance of parking lots and garages. 817 Work tickets were submitted to PATS Facilities division and all were completed:
 - 337 Work tickets for setting up barricades
 - 78 Work tickets for vandalism and broken glass
 - 131 Work tickets for sign replacement/installation
 - 26 Work tickets for parking lot repairs
 - 25 Work tickets for other structure and lot cleaning
 - 28 Work tickets for painting
 - 7 Work tickets for gate arm replacements
 - 102 Work tickets for pay station battery replacements
 - 83 Work tickets are classified as other/miscellaneous
- Facilities performed maintenance and repair activities such as seal coat, crack fill, and re-striping various parking lots totaling 158,904 square feet.
 - 1009 Bradbury Lot – 31,209 sq. ft.: Facilities crack sealed, seal coated, and restriped lot.
 - 801 University Lot – 12,778 sq. ft.: Facilities crack sealed, seal coated, and restriped lot.
 - A2/A3 Lot – 81,503 sq. ft.: Facilities re-striping the parking lanes and ADA signage and stenciling.
 - R – Zone, Redondo Village – 33,414 sq. ft.: Facilities crack sealed, seal coated, and re-striping the parking lanes, EV signage and stenciling.
 - Facilities used 115 gallons of street paint (assorted colors) and 41 cans of aerosol striping paint
 - Facilities restriped the fire lanes (red), no parking zones (yellow), loading zones (green), shuttle bus stops (yellow), street parking spaces and applied stenciling (e.g. “Pay Station Parking”, “Reserved”) in the following areas:
 - Redondo, Las Lomas, and Campus Blvd. (B and C zones)
 - All Shuttle Stops
 - A2/A3 Lot
 - R - Zone
 - Student Union Building (SUB) & Fine Arts Roadway
 - W – Zone

Transportation Operations

- During FY23, shuttle operations recorded a total of 996,000 passengers boarding, which can be further broken down as follows:
 - A total of 924,937 passengers utilized the regular weekday shuttle service.

- Additionally, 71,063 passengers utilized the special event shuttle service during 109 special events.
 - These figures indicate a notable increase in passenger boarding compared to FY22, with an overall increase of 252,729 passengers boarding and a specific increase of 30,187 passengers for the special event shuttle service.
- In FY23, the total cost for shuttle bus repair and maintenance amounts to \$583,788. This comprises \$543,168 allocated for basic repairs and maintenance, along with an additional \$40,619 designated for major repairs.
- In October 2022, the acquisition of two brand-new Star Craft Ford 650 Unleaded fuel buses, specifically units 1793 and 1794, was completed at a cost of \$187,745 each, resulting in a total purchase expenditure of \$375,490. These newly acquired buses are intended to replace the existing units, 1070 and 1071. The decision was made to retain the older buses in active service until the six new buses arrive, as part of the Volkswagen (VW) Grant project scheduled for early 2024.
- Underlining our commitment to fleet modernization and our dedication to using cleaner and more sustainable fuels, the forthcoming acquisition of six new Compressed Natural Gas (CNG) fueled buses, funded through the Volkswagen (VW) Grant, will replace six existing diesel fueled buses that range in age from 14 to 16 years old.
- In the latter part of FY23, we introduced a new mobile application called "Passio GO." This GPS app allows users to access real-time tracking of shuttle buses, offering significantly improved accuracy and user-friendliness compared to the previous application, UNM Where's My Bus (WMB), which did not provide the same level of precision or ease of use.
- The FY23 shuttle operations accumulated a total mileage of 308,567 miles, which is calculated based on the mileage covered by each bus per fiscal year.
- During FY23, a total of 83,847 gallons of fuel was consumed. The average fuel efficiency across the fleet is 3.66 miles per gallon (MPG). This average includes specific fuel efficiencies for the different fuel types: Diesel at 3.1 MPG, Compressed Natural Gas (CNG) at 3.1 MPG, and Unleaded fuel at 4.8 MPG.

iii. FUTURE PLANS

PATS leadership will continue to engage stakeholders to gain a better understanding of unique parking and transportation needs. Leadership will

meet with other UNM departments and stakeholders to discuss unique needs and will participate on committees and campus-wide initiatives that are directly and/or indirectly impacted by parking and transportation services. Active engagement and collaboration with Planning, Design, and Construction (PDC) on the Integrated Campus Plan, active involvement and collaboration with the Campus Safety Initiative, direct talks with various departments and campus groups, serve as examples of PATS' commitment to the university community. Additionally, PATS is committed to being good stewards of parking and transportation services and will continue to perform necessary repairs and maintenance work on the existing inventory of parking lots and transportation vehicles to provide our stakeholders with safe parking and transportation options.

PATS leadership will continue to develop and facilitate innovative solutions and alternatives for stakeholder parking and transportation needs. The PATS management team and staff will work with stakeholders to develop innovative and sustainable solutions to campus-wide parking and transportation needs. The expansion of "Pay-By-Plate" for pay station stall usage, the expansion of electronic patient parking permits being issued when customers are meeting with their providers, exploring the use of golf carts to augment campus transportation options, and reconfiguring parking in existing lots and developing additional land parcels to expand customer parking options, exploring marketing options and opportunities to offset operational costs, are just a few of the solutions being explored.

PATS leadership will continue to streamline and improve parking and transportation processes to provide efficient and high-quality services. The PATS management team and staff will work to identify areas for operational improvement and will engage stakeholders to identify key areas of needed improvement for operations through their experiences with the department. Leveraging existing information technology that supports and facilitates parking and transportation services for our customers, adopting technology that will allow us to automate certain processes. Installation of Mobile Data Terminals on buses that will electronically track boarding counts, adopting technology that will create a safer campus environment for those that work or reside at UNM such as License Plate Recognition (LPR) technology and continuing to improve the customer experience when using the online PATS Parking Portal are areas being evaluated.

Appendix I: Planning, Design & Construction (PDC)

Mission and Vision

Mission

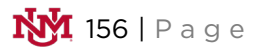
To steward UNM's campus identity and lead capital development to create outstanding environments.

Vision

Great spaces for great people doing great things.



**PLANNING,
DESIGN &
CONSTRUCTION**



i. EXECUTIVE SUMMARY

UNM Planning, Design & Construction (PDC) had a very successful FY23. PDC leadership is experienced, coordinated, and functions with practiced skills to provide the University with high-quality, comprehensive facility planning, capital project management, and strategic guidance on the built environment. While optimal staffing levels are elusive, leaving some positions unfilled for months, the PDC team remains agile and productive, and continues to operate successfully and in a hybrid format.

As of June 30, 2023, PDC managed 183 projects for a project value of \$188 Million. PDC completed 86 projects worth \$39 million during the 12 months of FY23. PDC delivered the Reserve Officer Training Education Center, the New Mexico Mutual Champions Training Center, and many other value-creating capital improvements. PDC successfully launched the Center for Collaborative Arts & Technology (CCAT) capital project and selected an outstanding, diverse, and internationally recognized design team. In facility planning, PDC successfully managed multiple comprehensive planning activities such as program development for the CCAT, Humanities, and Social Science Concept Plan, a Strategic Housing Plan, and a 10-year Popejoy Plan.

The Integrated Campus Plan (ICP) effort has been and continues to be a significant work effort and promises lasting benefits to the University's strategic facility plan. Since FY20, PDC provided leadership and facilitated the significant development of the Asset Management Program (AMP), allowing Institutional Support Services (ISS) to graduate the program in FY23 to ISS management for broader alignment with institutional services.

Through FY23, material and labor resource delays continued challenging the schedule and budget. Smaller, Building Renewal & Replacement (BR&R) funded projects are most vulnerable to these market changes as the time frame for completion is a fiscal year. Project Managers continued to apply all tools to manage ongoing projects' scope, schedule, and budget.

PDC's financial team developed the PDC Financial Standard Operating Procedure (SOP) for all processes and workflows for transactions, such as closing out a project, opening a new index for a project, and closing out indices. PDC also solidified the use of Oracle Unifier in managing project processes. The team looks forward to several active years of bond-funded projects via Government Obligation Bonds (GOB's), Institutional Bonds (IB's), and BR&R funds.

Cumulative for PDC as of June 30, 2023	
	EOY
TOTAL REVENUE	\$2,027,428
Total Compensation	\$1,978,429
Total non-Salary Expenses	\$122,091
TOTAL EXPENSES	\$2,100,520
Profit (Loss)	(\$73,092)
Year End Reserves	Balances
240A	\$59,164
250A	(\$182,425)
Total Reserves for PDC	(\$123,261)

ii. SIGNIFICANT ACCOMPLISHMENTS

PDC has been instrumental in attending to UNM's Comprehensive Facility Planning:

- PDC completed the first two phases of the ICP process with input from more than 50 UNM stakeholder groups in Albuquerque and across the state.
- PDC leads the recommended space policy and procedures updates with the AMP Committee, the Space Policy Sub-committee, and the Policy Office.
- In partnership with the Provost Office and the College of Arts & Sciences, PDC completed the Humanities and Social Sciences Concept Plan that provides guidance on how to replace the Humanities building and Ortega Hall, two of UNM's most dilapidated structures that have exceeded their lifespan and UNM's resources.
- In partnership with the Residence Life & Student Housing (RLSH), PDC has completed the Strategic Housing Plan that outlines how best to implement improvements to the University's student housing in alignment with its overall strategic plan in UNM 2040.
- In partnership with the Popejoy Presents, PDC completed the 10-Year Popejoy Plan to prioritize Popejoy Hall's improvements and secure funding.
- PDC conducted the UNM Art Museum Relocation Feasibility Study on behalf of the College of Fine Arts to relocate the largest art collection in New Mexico (over 30,000 objects) to a more appropriate location that protects the collection and makes it more available for student learning and community access.

Milestone Project Completion

- PDC substantially completed 86 projects totaling \$39,675,668 in FY23 valued between \$1,000 and \$10,900,000. Several of the more notable projects are listed here:
 - The ROTC, ROTC Education Center, received Substantial Completion in April 2023 with occupancy in April 2023. Budget: \$11,417,379.
 - The New Mexico Mutual Champions Training Center received Substantial Completion in March 2023. Budget: \$4,780,761.
 - The Natural History Science Center, initially completed in June 2021, had a second phase, which added compact storage units to the storage area. That work received Substantial Completion in December 2022, and the project is closed. Budget: \$4,499,042.
 - The Taos Water Tank project received Substantial Completion in December 2022. Budget: \$2,587,972.
 - The Redondo Village Apartments (RVA) Emergency Stair Replacement received Substantial Completion in January 2023. Budget: \$1,022,462.
 - The Student Residence Center (SRC) Stairs Phase 2 received Substantial Completion in August 2023. Budget: \$1,066,851.

A snapshot of PDC projects as of June 30, 2023 is below:

PDC Projects by Project Phase as of 06/30/2023				
Project Phase	Number	%	Total Budget	%
Scoping	58	31.69%	\$75,125,187.34	40.35%
Pending	13	7.10%	\$5,408.00	0.00%
Planning	3	1.64%	\$20,046,490.00	10.77%
Planning Only	11	6.01%	\$2,598,421.31	1.40%
Design	36	19.67%	\$19,711,765.19	10.59%
Construction	55	30.05%	\$62,620,636.10	33.63%
Ready to Close	7	3.83%	\$6,078,792.00	3.26%
Total	183	100.00%	\$186,186,699.94	100.00%

iii. FUTURE PLANS

PDC will continue to work on the following planning efforts:

- The ICP process will be completed in December 2023, including

implementation and tracking tools.

- The Campus Safety Plan will be completed in December 2023 to consider community and safety improvements carefully.
- The feasibility studies for Honors College, School of Public Health, UNM Observatory, Law School Expansion, and Psychology Clinic relocation.

PDC will continue to work on the following large projects in FY24:

- Lobo Welcome Center is expected to receive Substantial Completion in March 2024. Budget: \$6,800,000.
- The Gallup's Gurley Hall Vocational Center project will break ground in May 2024 and is expected to receive Substantial Completion in December 2024. Budget: \$6,405,300.
- PDC worked with ISS' Office of Campus Environments and Facilities to secure a total of \$56M in IB's to fund these critical projects, currently underway:
 - The CCAT attracted multiple internationally recognized architectural teams for its Request for Proposal (RFP) in Spring 2023 and began programming in June 2023. Construction is anticipated to begin in FY25, with project completion in FY26. Budget: \$65M; \$20M in IB's.
 - Police Center: An RFP for the design team will be released in July 2023; the project will begin with a site selection and complete design in June 2024. Budget: \$9,000,000.
 - RLSH Renovations: Projects in various locations on the Main Campus will be designed in FY24 and be constructed in summer FY25 and FY26. Budget: \$20,000,000.
 - Duck Pond: Budget \$4,000,000.
 - Lobo Welcome Center: \$3,000,000 in IB's to supplement budget.

Appendix J: UNM Public Events/Popejoy

Mission and Vision

Mission

To make the performing arts accessible to all New Mexicans.

Vision

To create 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.

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i. EXECUTIVE SUMMARY

Popejoy Hall's 57th season kicked off with two nearly sold out performances of *Killer Queen*, followed by a very successful Broadway run of *Hairspray*. The season continued to provide a unique opportunity for its patrons to experience a variety of productions. A particularly thrilling Broadway season saw week-long engagements of *To Kill a Mockingbird*, *Dear Evan Hansen*, and *Aladdin*. After several postponements due to COVID- 19, *Hamilton* finally made its way to Popejoy for a long-awaited three-week run in May 2023. A sampling of additional popular programs included: *Lucy Loves Desi*, *Mariachi Christmas*, *Romeo & Juliet*, *The Doo Wop Project*, and *Piano Battle*. With 76 completed performances total, more than 125,000 patrons attended Popejoy Hall's Broadway and Ovation Series shows throughout the year.

This year also saw the return of live performances for Popejoy's Schooltime Series. In total, there were six performances on stage, which were also livestreamed to schools and groups unable to attend. Popejoy saw more than 7,500 local schoolchildren attend the Schooltime Series this year.

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 continue to be the largest contributor towards Popejoy's financial stability totaling \$ 10,042,836. Contributed revenue totaled \$1,551,303 including \$506,666 in estate gifts and \$677,010 through the Benefactor program.

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, and marketing and labor expenses. Popejoy's fixed overhead expenses are around \$1,500,000. The total budget ranges from \$5 and \$10 million.

Popejoy continues to operate with a relatively small staff for a theater of its size. We employed a total of 21 full time staff members during FY23. In addition to full time staff members, Popejoy employs several on-call staff members and approximately 50 student employees throughout its departments. Additionally, 175 active volunteers provided services to over 195,000 patrons and donated more than 16,000 hours, saving Popejoy an estimated \$535,543 in labor costs.

Finally, after having previously been appointed Interim Director of Popejoy Hall, Fabianna Borghese Tabeling was appointed Director effective May 1, 2023.

ii. SIGNIFICANT ACCOMPLISHMENTS

Popejoy Hall presented 75 productions totaling 152 performances. Additionally, Popejoy Hall held a fundraising banquet on stage in December 2022 to support the Excellence Fund. The event was successful in not only raising \$63,000 for the excellence fund through table sales, but it also brought new donors to Popejoy Hall as they were invited by Board members to have their first experience at Popejoy. At the banquet we also unveiled our new outreach program, Broadway for Teens, and received an additional \$30,500 in donations towards that program.

Development efforts continue to be incredibly successful as we have, for the seventh year in a row, exceeded initial fundraising goals. This year, contributions from donors totaled \$1,551,303, including major pledges, bequests, and contributions received for the Benefactor Program.

After being rescheduled three times due to COVID-19, the national Broadway tour of *Hamilton* performed at Popejoy for a total of 24 performances with 44,773 patrons attending and total earned revenue of \$5,446,053.

Popejoy also received donated funding to launch a new program, Broadway for Teens, which allowed 80 New Mexico high school students to attend a performance of *Hamilton*. Students from Albuquerque High and Cuba Independent School District (Cuba, NM) were selected to see the performance free of cost. The selected students attended a weeknight performance of *Hamilton* and also had dinner catered in Popejoy's Benefactor Lounge.

Additionally, the 2022-2023 season saw the return of live Schooltime Series performances for local schoolchildren and home school groups. In total, six live performances were presented through the season with more than 7,500 children in attendance. These performances were also livestreamed as they had been during COVID-19 and were accessible for free to many schools/groups in the area.

Completed Events July 1, 2022 - June 30, 2023

Popejoy Presents – Broadway in New Mexico

- Hairspray (6 performances)..... October 6-9, 2022
- How to Kill a Mockingbird (8 performances) December 13-18, 2022
- Fiddler on the Roof (6 performances)..... January 26-29, 2023
- Dear Evan Hansen (7 performances)..... March 22-26, 2023
- Hamilton (24 performances) May 9-28, 2023
- Aladdin (7 performances) June 7-11, 2023

Popejoy Presents - Ovation Series

- Killer Queen September 17-18, 2022
- Pride and Prejudice (2 performances)October 23, 2022
- David Sedaris November 11, 2022
- Mariachi ChristmasDecember 9, 2022
- Luci Loves Desi..... January 20, 2023
- Simon & Garfunkel February 4, 2023
- H.M.S. Pinafore February 5, 2023
- Three Musketeers February 18, 2023
- Romeo & Juliet February 19, 2023
- Our PlanetFebruary 24, 2023
- Pilobolus February 25, 2023
- Ray on my Mind February 26, 2023
- Rhythm of the DanceMarch 5, 2023
- ABT Studio March 12, 2023
- The Doo Wop ProjectApril 1, 2023
- Piano Battle.....April 16, 2023

Schoolltime Series

- Sugarskull (2 performances)October 12, 2022
- Pride & PrejudiceOctober 24, 2022
- The Nutcracker Ballet November 28, 2022
- Mariachi ChristmasDecember 9, 2022
- ABT Studio March 13, 2023
- Shanghai Circus (2 performances)April 23, 2023

Resident Events

New Mexico Philharmonic

- Youth Concerts (4 performances) September 27 & 30, 2022
- Tchaikovsky Fest IOctober 15, 2022
- Tchaikovsky Fest IIOctober 16, 2022
- Tchaikovsky Fest IIIOctober 22, 2022
- Olga Kern SpecialOctober 29, 2022
- Classics IIINovember 5, 2022
- Pops I November 19, 2022
- Classics IV January 14, 2023
- Classics V February 11, 2023
- Pops III March 11, 2023
- Classics VI March 18, 2023

- Pops IV April 15, 2023
- Youth Concerts (6 performances) April 18, 20 & 21, 2023
- Classics VII April 22, 2023

UNM Music Department

- Wind Symphony September 21, 2022
- Orchestra September 29, 2022
- Symphonic Band October 3, 2022
- Wind Symphony October 19, 2022
- Orchestra November 10, 2022
- AYS Concerts (2 performances) November 13, 2022
- Wind Symphony November 16, 2022
- Wind Symphony February 8, 2023
- Orchestra February 16, 2023
- Symphonic Band February 27, 2023
- Wind Symphony March 8, 2023
- Orchestra March 30, 2023
- Wind Symphony April 19, 2023
- Symphonic Band April 26, 2023
- AYS Concert (4 performances) April 30, 2023

UNM Additional Department Rentals

- College of Pharmacy White Coat Ceremony August 11, 2022
- College of Pharmacy White Coat Ceremony August 21, 2022
- College of Pharmacy White Coat Ceremony September 22, 2022
- Senior Day September 24, 2022
- DECA January 10, 2023
- Greek Sing March 3, 2023
- College of Pharmacy Pinning Ceremony April 6, 2023

Outside Rentals

- ACAC Performance July 12, 2022
- The Nutcracker Ballet (4 performances) November 26-27, December 3-4, 2022
- Mannheim Steamroller December 7, 2022
- The Illusionists December 20, 2022
- All State (4 performances)..... January 4-7, 2023
- The Langston Hughes Project February 3, 2023
- Step Africa! March 2, 2023

- PAPA Dance RecitalApril 7, 2023
- Enchantment AwardsApril 28, 2023
- NM Gay Men’s Chorus June 17, 2023

POPEJOY – FACILITY USE DURING FISCAL YEAR 2022-2023

General Hall Usage Statistics:

Total number of events in venue.....	75
Total number of performances in venue.....	152
Total number in attendance.....	195,053
Total number of days with performances/rehearsals.....	79
Total number days for technical requirements.....	102
Total number of “dark” days with no activity.....	84

UNMPE Presentations/Popejoy Presents

Total number of Popejoy Presents events.....	23
Total number of Popejoy Presents performances.....	76
Total number of Popejoy Presents patrons.....	125,929
Average number in attendance per performance.....	1,656

Popejoy Hall Rentals – NM Philharmonic/Outside

Total number of events/NM Philharmonic.....	12
Total number of performances/NM Philharmonic.....	22
Total number attending/NM Philharmonic.....	21,490
Average number attending per performance/NM Philharmonic.....	977
Total number of events/Outside.....	10
Total number of performances/Outside.....	19
Total number attending/Outside.....	21,502
Average number attending/Outside.....	1,132

UNM Department Usage, Including UNM’s Music Dept

Total number of events.....	25
Total number of performances.....	29
Total number attending.....	16,742
Average number per performance.....	577

iii. FUTURE PLANS

The 10-year feasibility study results will guide the next 10 years of capital campaigning and capital projects at Popejoy Hall. Some of the projects will include a remodel and reworking of the Popejoy Hall lobby space, addition of a

Donors' Garden, remodel of the donors' Lounge to improve ADA accessibility, rebuilding of Popejoy Hall loading dock and expansion of back of stage to better serve larger touring productions. The study is expected to be completed in Fall 2023 and the Popejoy Hall Lobby Renovation project will be designed and developed with construction slated to begin in Summer 2024.

With the Center Stage Banquet held annually to promote and fundraise for the Popejoy Hall Excellence Fund, the endowment has grown allowing Popejoy to use the spending account to enhance programming for the 2023-2024 Seasons and beyond. The funding will help underwrite the costs of a performance allowing Popejoy to bring the best in performing arts to New Mexico.

Popejoy's newest outreach program, Broadway for Teens, will be expanded to include more schools from all parts of the state of New Mexico. More than 400 students are expected to participate in the program in 2023-2024.

Appendix K: Real Estate Department (RED)

Mission and Vision

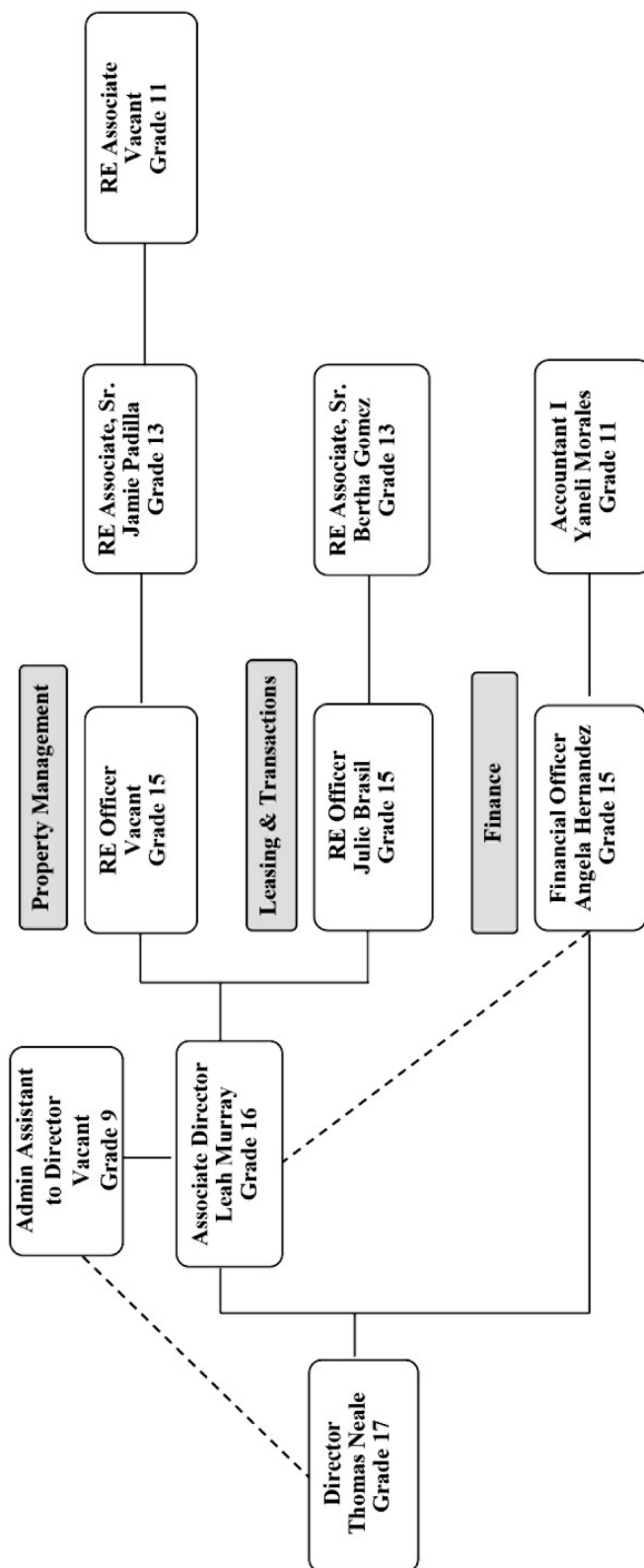
Mission

To provide effective, efficient real estate service to University customers that 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.

Vision

The Real Estate Department is a component of Institutional Support Services (ISS). Our vision is in alignment and in support of the vision of ISS. To establish 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



i. EXECUTIVE SUMMARY

The University Real Estate Department (RED) provides professional real estate services for all entities of the Regents of the University of New Mexico (UNM) including all academic, research, and administrative departments of Main Campus, the UNM Health Sciences Center, UNM Hospitals, UNM Medical Group, UNM Sandoval Regional Medical Center, and UNM Branches in Taos, Gallup, Los Alamos and Valencia County. In addition, RED provides professional real estate support to the Lobo Development Corporation (LDC).

Principal functions of the department include all real property acquisitions/dispositions, property management, and leasing for all entities of the Regents, including lease administration of 234 leases containing approximately 1,603,775 square feet totaling approximately \$11,626,503 in annual lease payments. Since 2013, RED has facilitated over \$70,000,000 in real property acquisitions and development projects on behalf of Regent-controlled entities.

RED currently consists of seven full-time employees, in addition to senior leadership, one staff member is assigned to property management of over 500,000 square feet of office and R&D space, two are assigned to leasing and real property transactions, and two are assigned to financial/asset management. Three positions are currently vacant.

Annual Operating Budget in FY23:

Administrative Operations	\$ 1,270,543
Assets Under Direct Management	\$11,990,409
Capital Improvement Projects	\$ 704,042
Departmental Debt Service Requirements	<u>\$ 1,756,911</u>
Total	\$15,721,905

ii. SIGNIFICANT ACCOMPLISHMENTS

- RED is an auxiliary enterprise and is responsible for generating revenue from assets under management to cover operational costs, debt service obligations, and funding commitments to ISS. RED has consistently outperformed the market for the past five years in terms of occupancy and achievable growth in net operating income. Between FY18 and FY23, occupancy of assets under management has been greater than 95% and operating revenue increased from \$9.6 million to \$11.6 million, or an annual rate of growth of approximately 4.0% per year. During this same period operating expenses increased by approximately 1.7% per year and net income increased by

approximately 12.8% per year. Net income of all assets under management for FY23 was \$2.8 million. Our management team at the Science & Technology Park (STP), planned and executed critical capital replacement projects across multiple facilities, a total value of \$704,042.

- RED continues to support the Asset Management Program (AMP), through the process of inputting real estate documents (deeds, environmental reports, surveys, title commitments, etc.) as data points for the Geographic Information System (GIS) component of this project.
- In partnership with the UNM Special Assistant to the Provost for Laboratory Relations and the College of Engineering, RED performed feasibility analysis of the development of the proposed New Mexico Research Innovate Collaborative (NMRIC@UNM) facility. RED will continue to lead negotiations with our national laboratory partners through responses to RFI/RFPs, lease negotiations, financing, and procurement of construction services.
- In collaboration with Lobo Energy, RED defined the scope of work and feasibility of performance contracting and renewable energy projects at STP in conjunction with capital replacement needs, to save energy, reduce our carbon footprint, and assist with long-term financial pro forma budgeting.
- Executed a detailed building condition assessment of the Maui High Performance Computing Center and performed a feasibility analysis with acquisition, leasing, and disposition strategies.

iii. FUTURE PLANS

- Complete five and ten-year budget and planning tools that include revenue, expense projections, capital improvement needs/expenditures, and human resource and administrative costs. Enabling the department to match long term revenue projections with capital needs.
- Continue the real property database component of the ISS sponsored asset management program. By the end of the fiscal year, it is RED's goal to have all property data digitized and attached to the GIS database to facilitate preservation and improved access property related information. Data includes deeds, surveys, environmental reports, acquisition history, and appraisals.
- In partnership with Lobo Energy, implement and participate as owner's representative for multiple projects impacting eight facilities, at an estimated total value of \$4,362,000 at STP, including a complete

HVAC retrofit of 801 University Blvd. requiring RED to provide a capital contribution of \$600,000.

- Seek long term strategies for UNM entities that occupy more than 20,000 square feet in leased space. The goal is to avoid unacceptable financial and operating leverage exerted by landlords.
- In partnership with Residents Life and Student Housing (RLSH), enter into discussion with American Campus Communities (ACC) to renegotiate the lease agreement to improve the University's position and provide a seamless experience for students in on-campus housing.
- In collaboration with LDC, continue to identify redevelopment opportunities for InnovateAbq with focus on renovation of existing facilities.

Appendix L:

Residence Life & Student Housing (RLSH)

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.

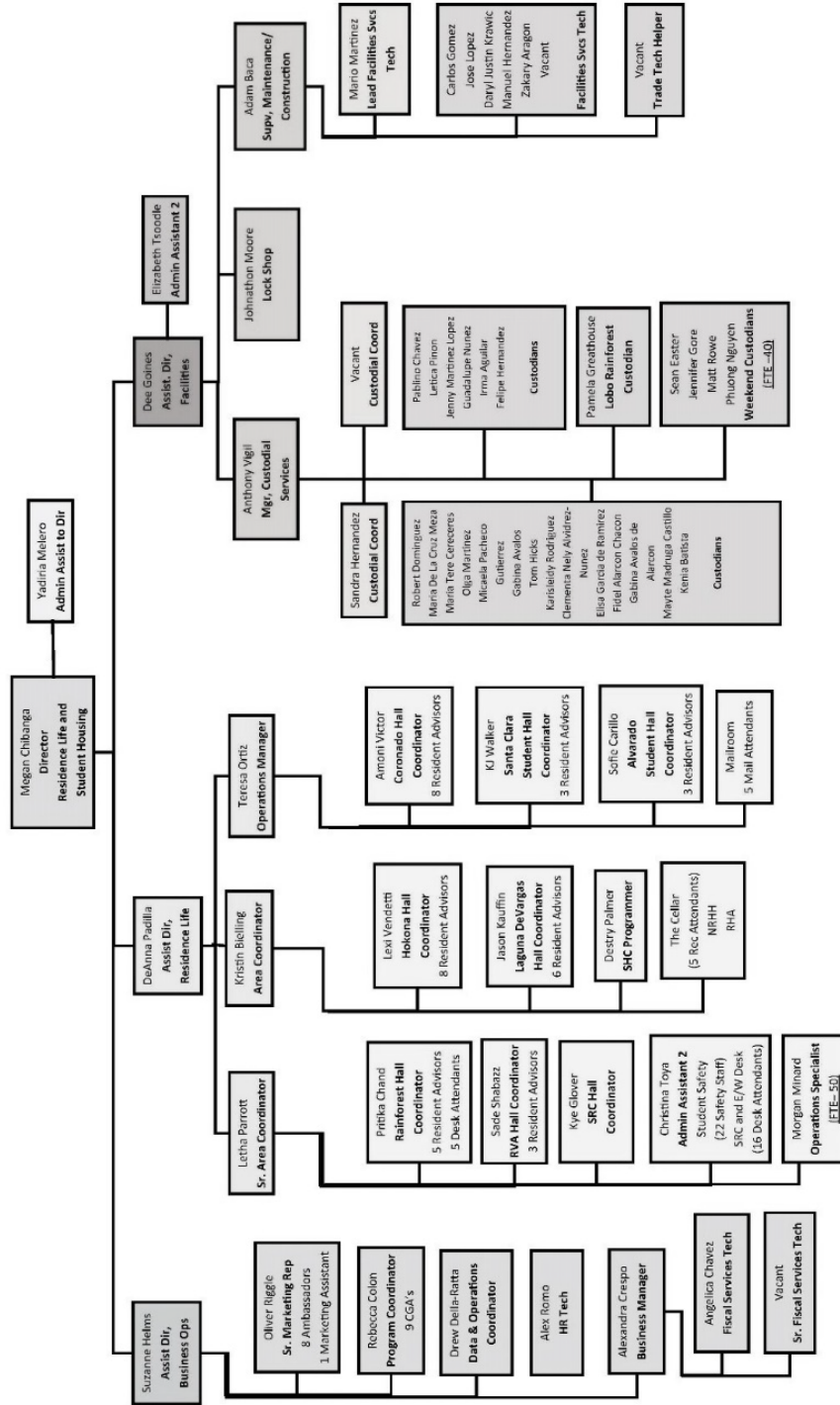
Vision

8 Residence Halls. 9 Living Learning Communities. 2,000+ Residents. Endless Opportunity.

Organizational Chart



A Division of VP Institutional Support Services
Last Updated July 25, 2023



i. EXECUTIVE SUMMARY

The 2022-2023 academic year had marked difficulties but was overall a successful year for Residence Life & Student Housing (RLSH). We honor and remember Brandon Travis who was lost in November of 2022. We are grateful for the contributions Brandon made to our residential community.

Occupancy remained above initial estimations, which required the utilization of triple rooms again for the first time in more than a decade. The high occupancy supported a vibrant on campus resident population who reported the highest to date levels of satisfaction with their overall living experience in the annual resident engagement survey.

By term, RLSH saw the following occupancy levels:

- Fall 2022
 - 2,353 residents; 99.3% occupancy rate
 - 2,077 Main Campus; 100.5%
 - 276 Rainforest; 91.1%
- Spring 2023
 - 2,181 residents; 92% occupancy rate
 - 1,898 Main Campus; 91.8%
 - 280 Rainforest; 92.4%

The robust occupancy in FY23 provided ample support for RLSH operational needs, but more importantly, provided for a healthy transfer to Capital Reserves, of \$4,778,411. This amount is inclusive of our intended minimum transfer of \$1.5 million, which supports the overall change in budgeting philosophy employed by RLSH in the FY23 budget development cycle.

RLSH also returned \$975,000 to our general reserve balance in support of our newly defined target amount for our departmental reserves. RLSH is aiming for and carefully working toward one full year of debt service as well as six months of operating (salary and non-salary) expenses within our departmental reserve.

RLSH was also the recipient of a \$20 million-dollar Institutional Bond in April of 2023 which is being deployed to address the initial projects identified in Phase 1 of the Brailsford & Dunlavey (B&D) housing study finalized in FY23.

ii. SIGNIFICANT ACCOMPLISHMENTS

RLSH realized several major accomplishments in 2022-2023, which include:

- Completion of the Strategic Housing Plan
- Capital Improvements: Santa Clara Entryway
- Implementing TORUS Key Tracking System

Completion of the Strategic Housing Plan

Our most significant accomplishment in 2022-2023 was the completion of the Strategic Housing Plan with B&D. For 18 months, RLSH engaged with B&D to conduct a comprehensive review of the value asset of campus housing to achieving the UNM 2040 goals and to develop a plan with and for RLSH to effectively address the backlog of maintenance and anticipate future needs of residential students. The efforts with B&D have materialized a ten-phase renovation plan, totaling \$120,000,000 and 12 additional recommendations. We are excited about the possibilities presented for the future of campus housing, and look forward to realizing this imagined future.

Capital Improvements: Santa Clara Entryway (\$199,105)

RLSH, with the project management team from PDC have completed an important inaugural project to consciously address the physical inaccessibility of some of our residence halls. The project included a full reconstruction of the entry way at the southwest corner of Santa Clara Hall; a historic building which required careful efforts to preserve the character of the space. This entry way is now fully accessible and provides a means of access and egress which did not previously exist within the building. The two remaining entrances to Santa Clara will be receiving similar upgrades in FY24.

Implementing TORUS Key Tracking System

This is an unconventional but incredibly impactful improvement that RLSH worked on in FY23. RLSH has thousands of doors within our facilities, and nearly all those doors have keys which need to be tracked or managed. RLSH has always had robust key management policies and procedures but implementing TORUS has created efficiency and tracking that we did not previously have with our master key management systems. TORUS is a cloud-based software which controls physical lock-boxes for our keys here on campus. We have been able to set up alerts and notifications, design smarter and safer controls, and resolve and react to issues quicker than before. This means our buildings are more secure and safer. This was a significant effort, and we are proud of all the teams involved.

iii. FUTURE PLANS

RLSH is continuing to work in support of UNM 2040 through several specific efforts in alignment with Goals 2, 3, and 4.

Goal 2: Student Experience and Educational Innovation

RLSH is looking toward objectives 4 and 5, specifically with two primary drivers to realize those contributions. RLSH has a robust Living Learning Program (LLP) which has the capacity to scale and upsize in order to truly connect the in and out of classroom learning experiences. Within the LLP, the residence halls can become a learning laboratory and connect students to one another and to the future possibilities of their specific interest area. Capitalization on the foundation of our current LLP through a stronger connection with Academic Affairs will improve the overall experience and outcomes of the program. Secondly, RLSH has a self-developed programming model to guide and drive the learning goals within the residential experience. The learning goals within the programming model emphasize connection to the community and the act of learning as an everyday endeavor which is not limited to a classroom space.

Goal 3: Inclusive Excellence

RLSH's mission is "To foster inclusive, community-based living environments consciously designed for our residents' personal growth and academic success"—inclusivity is the first tenant of our mission because we believe it is a fundamental necessity to the growth and development of whole persons. RLSH will always focus on the interpersonal efforts to build the communities which are welcoming and affirming to all, but in the immediate future, RLSH will be focusing on physical improvements to the residential buildings to improve and enhance access to the physical space.

In addition to physical space improvements, RLSH plans to do a full review of our digital space to assure we are presenting information, to be clear, concise, easily navigable, and understood by first generation students and families. RLSH is also examining the possibility of providing major departmental documents or marketing materials in English and Spanish to increase access.

Goal 4: Sustainability

We plan to institute a culture of manager level knowledge and accountability for stewardship of funds within their working areas. We also intend to pursue rate modeling and forecasting which equally balances price sensitivity for current students with a continued quality of product and experience for future students. We will be building budgets with a plan for a minimum amount to be transferred to plant funds to assure continued funding for capital improvements. Additionally, we will embrace transparency and input on RLSH

budget decision at all levels within the department through presentations and discussions on budgets throughout the fiscal year cycle.

Accompanying the redevelopment of our departmental budgeting process is an ambitious 10-year calendar to drive space planning and decision making related to capital improvements. This works in concert with the results of the Strategic Housing Plan which was produced by B&D.

Appendix M: Staff Council

Mission and Vision

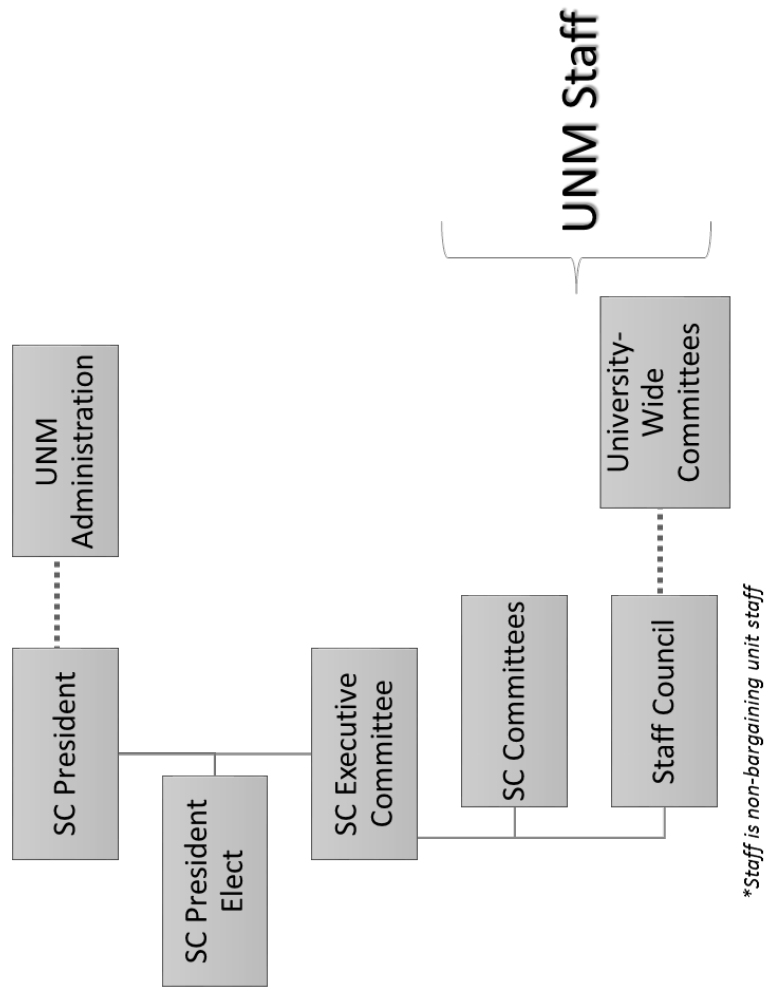
Mission

Staff Council nurtures leadership, education, advocacy, diversity, and service 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 the University of New Mexico (UNM); providing UNM Staff a support structure and forum to address issues of concern and providing opportunities for staff to work with people and organizations across the University and in our community.

Vision

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

Organizational Chart



i. EXECUTIVE SUMMARY

The University of New Mexico (UNM) Staff Council serves as the voice for staff in shared governance at UNM by conveying information and making recommendations to the President and other administrators 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 UNM. Over the past year Staff Council has engaged in several initiatives enabling the engagement of constituents and administration to help make effective institutional changes to improve the quality of life for staff. These activities are not limited to but include:

- Staff engagement and leadership opportunities through Staff Council Committee participation
- Increased partnerships through campus-wide committee representatives and liaisons
- Representing constituents through communication with administration, and finding answers to questions staff send to the Staff Council Office, the Executive Committee, and/or their representatives
- Highlighting the many UNM Staff contributions to UNM through continued award programs
- Collaborating with UNM stakeholders in efforts aimed at improving UNM Staff well-being

This year, Staff Council had strong turnout at events like the January Burrito Breakfast, Staff Appreciation Week, and the always popular Staff as Students where staff receive priority class registration. Staff Council currently has 13 committees, all with separate and specified charges that are voted on by the full council upon formation.

New initiatives include sponsoring this year's annual Women in Technology (WIT) event and the upcoming Level Up Expo, a collaboration between Staff Council, Employee and Organizational Development, Employee Wellness, Health Sciences Center (HSC) Wellness, and the Dean of Students, which will be 2-weeks of wellness, enrichment, and professional development.

All Staff Council events and initiatives are brought forward via an Event Request Form that is voted on by either the Executive Committee or the full council, depending on the level of funding requested. If there is no funding requested the requester may choose to bring it to either.

In addition to new initiatives, Staff Council continues to support our staff with programs such as Staff as Students, Brown Bag Lunch and Learn Presentations,

staff appreciation events, and award programs like People Appreciate Wonderful Staff (PAWS), Outstanding Supervisor, and Gerald W. May.

Budget Summary

The Staff Appreciation index (413000) received an allocation of \$31,000 and had a carryforward of \$14,599.53 of which approximately \$12,000 has already been spent. Staff Council currently has an additional \$4,500 that has been promised to support WIT and the Level Up Expo.

Staff Council Operating (413001) received an allocation of \$115,176.00 and had a carryforward of \$1,450.13.

The Outstanding Supervisor Award index (413002) was funded with a total of \$4,000; \$1K each from the Office of the President, Provost, Chancellor, and Senior VP for Finance & Administration, and had a carryforward of \$1,185.63. These funds may only be used for the award program.

The Gerald May Staff Award index (413003) is funded with \$10,000 annually from Staff Council operating had a carryforward of \$2,623.00. These funds may only be used for the award program.

ii. SIGNIFICANT ACCOMPLISHMENTS

- Resolution 2023 #1, Resolution to Reduce or Eliminate Cost Sharing for Behavioral Health Services which did result in policy change.
- Creation of one of Staff Council's newest committees, UNM Policy Review, chaired by the Staff Council President-Elect, which shall review draft University Administrative Policy (UAP) revisions and organize a Staff Council response as part of promoting constituent feedback process to proposed UAP policies developed by the University. The committee will perform review of existing policies and recommend changes to the appropriate policy office.
- UNM Staff Success Days which was a virtual event held in September 2022 with presentations from Teresa Costantinidis, Executive Vice President for Finance and Administration and Dr. James Holloway, Provost & Executive Vice President for Academic Affairs, UNM Department of Family and Community Medicine, Career Services, Ombuds for Staff, Counseling, Assistance & Referral Services (CARS), Employee Wellness, Continuing Education, Environmental Health and Safety, and more. The participation and attendance in this event was

outstanding, and the survey sent out afterwards showed that participants were overwhelmingly satisfied with the event.

- Several continued opportunities for our staff to engage in:
 - Mental Health Awareness Day
 - Staff as Students where staff receive priority registration for classes (twice a year)
 - May Multiplier Series offered through Employee and Organizational Development (EOD)
 - Ongoing “Ten-Minute Tidbits” and “Lunch and Learn” virtual sessions that focus informational presentations with emphasis of having everyone’s voice heard, valued, and respected with topics such as Imposter Syndrome, Black History Month, the Wayfinder Project, Water Quality, Use and Rates of Consumption on Campus, and more
 - Staff Breakfast at La Posada
 - Lovin’ on Little Lobos Charity drive
 - Diversity, Equity, and Inclusion (DEI) annual summit registration
- Staff Appreciation Week which included collaborations with Employee Wellness, Cancer Center, Lobo Food Pantry, New Mexico Public Broadcasting Service (NMPBS), Community Supported Public Radio from the University of New Mexico (KUNM), Museum of Southwestern Biology, Maxwell Museum, Physics & Astronomy and Interdisciplinary Science (PAIS), Zimmerman Library, Health Sciences Center (HSC) Wellness, Draft & Table, UNM Food, and of course we could not have had such a success without the support from UNM Special Activities Center, Facilities Management, and UNM Parking & Transportation.

iii. FUTURE PLANS

- Advocating for increased access to wellness opportunities for staff, and helping staff learn about and engage with the resources that we have through UNM.
 - Participating in and providing financial support for the upcoming Level Up Expo: Restoring Your Resilience, a collaboration between Staff Council, Employee and Organizational Development, Employee Wellness, HSC Wellness, and the Dean of Students.
 - Increasing awareness of resources like CARS by partnering and distributing their monthly staff newsletter through the Staff Council all-staff news.

- Bringing stakeholders and professionals in this and related fields to monthly Business meetings and Lunch and Learn presentations.
- Dedication towards helping staff understand their role, rights, and responsibilities regarding changes in UNM policy through: regular meetings between the Staff Council President and Director of the Policy and HR Offices, engaging those leaders with councilors and committee members at business meetings to talk about changes that come up for review, what they mean, how they affect staff, and how to participate in the process in a productive, respectful manner, and now through the Staff Council UNM Policy Review Committee.
- Working towards shared governance realized through partnerships, communication, committees, vocalizing concerns with UNM leadership and administration, and strategizing potential solutions across the broader UNM Community.
- Advocacy and continued support of staff in pursuit of education through the bi-annual Staff as Students events, in collaboration with Enrollment Management and the Office of the Registrar where staff get priority registration to help accommodate their work schedules and have class fees waived.
- Continued recognition of individual staff and improved morale through our quarterly PAWS awards, and our annual Outstanding Supervisor and Gerald W. May Staff award programs.

Appendix N: Utility Services Department

Mission and Vision

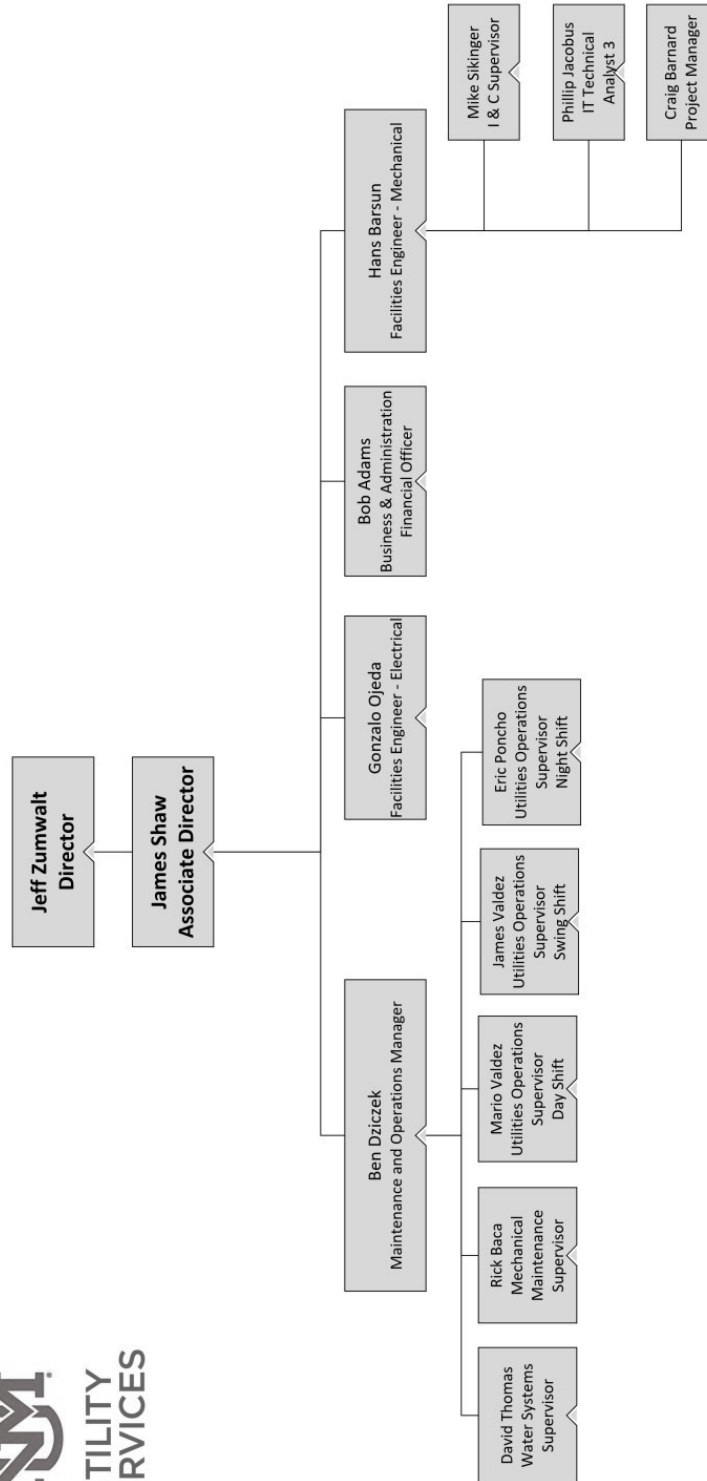
Mission

We are utility professionals working as a team to provide the campus community with safe and reliable utilities as sustainably, efficiently, and cost-effectively as possible.

Vision

We endeavor to exceed the utility needs of the University community with systems and processes founded upon a culture of operational excellence, teamwork, innovation, continuous improvement, integrity, and commitment to our customers.

Organizational Chart



i. EXECUTIVE SUMMARY

The Utility Services Department completed their first fiscal year as a department reporting directly to Institutional Support Services (ISS). The department assumed all of the requisite department-level duties previously provided by Facilities Management (FM). These new duties were primarily related to financial reporting and personnel management.

As a new department, Utility Services needed to establish its own strategic plan. The plan was completed and initiated in December. The plan included six goals to guide our prioritization, a monthly performance report to measure our success, and an action plan to coordinate and focus our initiatives.

The department also partnered with Lobo Energy Inc. (LEI) on developing a Comprehensive Utility Plan. The plan was completed in the spring and provides a roadmap for the next 20 years. A significant component of the plan is a project that could substantially reduce the greenhouse gas emissions of the University.

The budget summary below shows an increase in the reserves for the Utility Services Operating funds. This is only because \$4.2M was transferred from the Main Campus I&G Utilities fund. Without these transfers, the Operating funds would have ended the year with a \$3M deficit. Over half of this deficit can be attributed to a severe spike in natural gas prices in January and February 2023. Utility Services developed a plan in February to address the deficit which included a 3% rate increase for FY24 and significant natural gas hedges for the FY24 winter. The department will closely monitor the Operating funds in FY24 and adjust the plan as needed.

Budget Summary

- FY23 Operating funds:
 - FY22 Carry Forward: \$645,197
 - Revenues: \$26,419,120
 - Expenses: \$24,274,181
 - Net outgoing transfers: \$1,588,330
 - Year-end Balance: \$1,201,806
- FY23 I&G Utilities funds (Main Campus and HSC):
 - FY22 Carry Forward: \$4,510,584
 - Revenues: \$20,672,276
 - Expenses: \$19,975,933
 - Net outgoing transfers: \$4,200,000
 - Year-end Balance: \$1,006,927

ii. SIGNIFICANT ACCOMPLISHMENTS

The following is a summary of the significant developments that occurred within Utility Services in FY23:

- Utility Services was established as a separate department within ISS. The transition required assuming all administrative and financial duties as well as the I&G Utilities account. This was a major effort completed by our financial and administrative team, along with coordination and assistance from FM.
- Utility Services created a comprehensive strategic management process based on the following goals:
 - Safety
 - Environment
 - Reliability
 - Efficiency
 - Budget
 - Employee Satisfaction

The department developed a monthly performance report that quantifies progress in each of these goals. An annual action plan was also created to coordinate major initiatives and ensure alignment with goals. One outcome of this effort was the creation of a safety team and comprehensive safety training matrix. This training matrix was developed with Environmental Health & Safety (EHS) to define exactly what training each job classification should take and the interval.

- Utility Services conducted a test of the Backup Power System on June 3, 2023. The test successfully demonstrated that the gas turbines in the Ford Utilities Center can be used as an alternate source of electricity in the event of a prolonged Public Service Company of New Mexico (PNM) outage. The success of the test is a direct reflection of the preparation and expertise of the electricians and operators.
- The department partnered with LEI on developing a Comprehensive Utility Plan. The scope of the plan was initially for the North Campus. However, the team expanded the scope to explore options to transition from natural gas heating to electrical heating. The plan was completed in the spring and included some exciting opportunities to decrease the carbon footprint of the University while meeting future growth.

iii. FUTURE PLANS

The following is a summary of our future plans:

- Utility Services is researching the geo-exchange project that originated in the Comprehensive Utility Plan. This project includes installing geo-exchange wells underneath 30 acres of UNM property. These wells would provide a heat sink for a new hot water system. This system would replace the current steam heating system and dramatically reduce carbon emissions. There are many challenges and questions to be explored, however Utility Services will work through each until there is a clear plan going forward.
- In FY23, Utility Services started a project to create formal training manuals for each of the utility plants. This project was initiated for two reasons. Operators have expressed concerns with the existing training methods and there has been extensive turnover among the new operators. In addition, the training duration of the current program was too long and exacerbates vacancies. The new training program will be officially rolled out in the fall of 2023. This program will include system descriptions, standard operating procedures, employee qualification checkoffs, and a written exam.
- An automated outage notification project was initiated in 2023. This project will provide earlier notification of a power outage in buildings served directly by PNM. Currently, there is no official process for communicating an outage to ISS leadership. Leadership often learn of a PNM outage from the building occupants. Thus, with this project the equipment will automatically notify key personnel whenever a PNM-served building has an outage.
- The existing design guidelines for new facilities connecting to UNM utilities is unwieldy and ineffective. This is primarily due to its overall length of over 260 pages. In FY24, Utility Services will split the guidelines into two parts – new facilities and utility plants. The section for new facilities will be updated and incorporated into the FM Engineering and Energy Services Design Guidelines to provide a single document for building engineers.
- Utility Services employs a program that continuously captures key data points and stores them in a database. This program is termed a historian and is an important tool for tracking performance and automating metering and billing. It is also a valuable tool for troubleshooting incidents. The existing system is nearly 10 years old

and is no longer supported by the supplier. Utility Services will be transitioning to a new data collection program.



POLICE DEPARTMENT

POLICE.UNM.EDU



CHIEF OF POLICE
JOSEPH SILVA

Mission and Vision

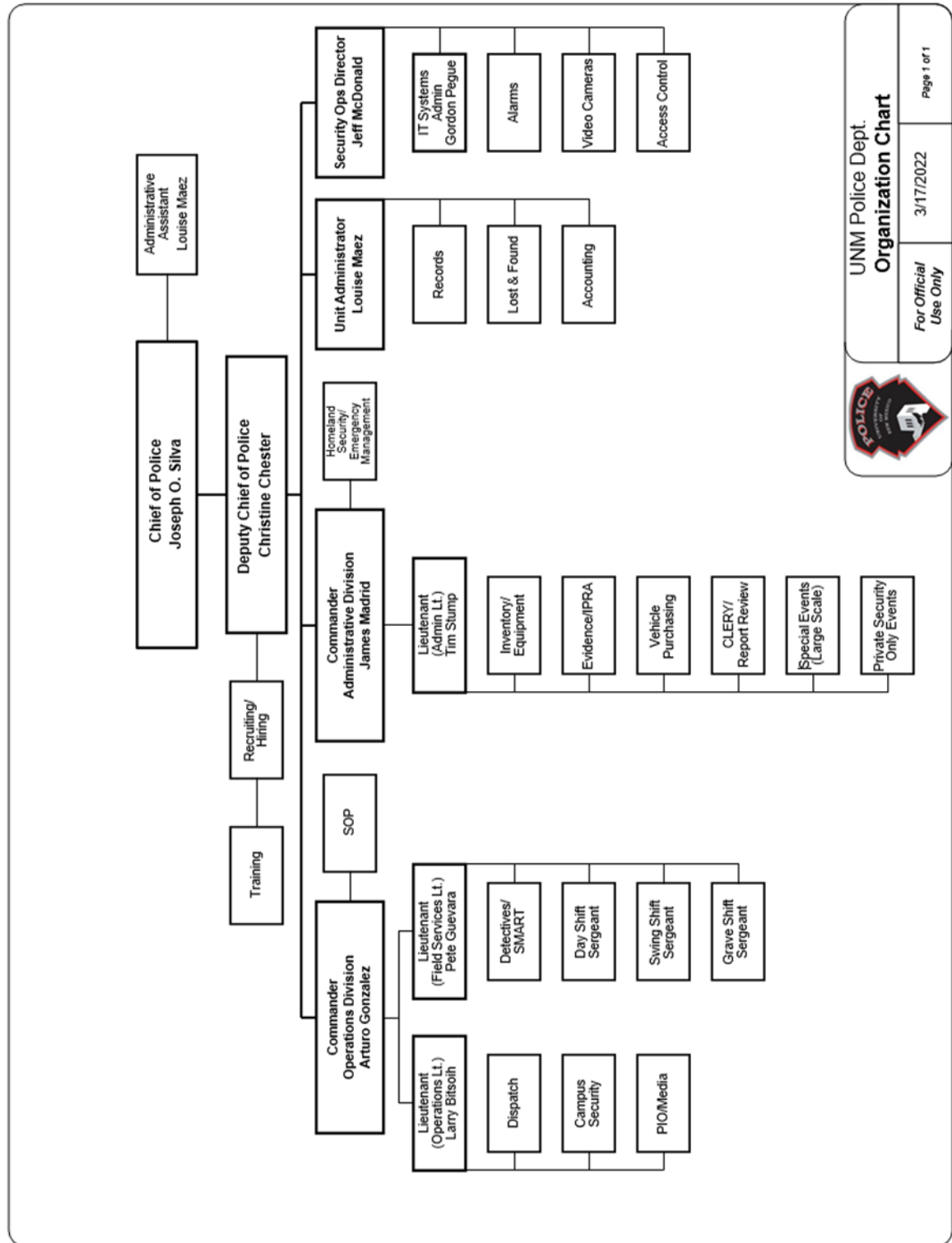
Mission

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.

Vision

To provide the highest level of service and protection to our campus through the highest professional ethics, performance, and personal commitment to ensure a safe place for the campus community to learn, work and grow together.

Organizational Chart



UNM Police Dept. Organization Chart

For Official Use Only 3/17/2022 Page 1 of 1

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i. EXECUTIVE SUMMARY

The University of New Mexico Police Department (UNMPD) had an operating budget of \$6,239,505 for FY23. Labor expense accounts for 95.4% or more of the total operating funds for UNMPD. Overtime expended in FY23 was \$262,721. There were no budget adjustments for this fiscal year.

The police department has experienced several successes in FY23 and has also faced significant challenges. The successes and tactics to our challenges come from UNMPD's most important resource, its people. Likewise, members of our community continue to participate in new meaningful ways with the police department that help make our community a safer and more secure place to learn, work and grow together. UNMPD continues to develop strategies, policies, training, and other systems that will help the department move forward and improve as an organization.

One particular challenge faced by our community surrounding our campus – which is a statewide problem – is the increase in crime, especially violent crimes. Law enforcement agencies across the state are continuously exploring various strategies to mitigate the driving forces of crime in our communities and UNMPD is no different. We are continuously searching for innovative solutions that combine technology and people – ways to develop partnerships within and outside our community when addressing not only crime but also quality of life issues. One such safety initiative is our Campus Watch Program, which is modeled much like the well-known Neighborhood Watch Program that was created in the early 1970s and spread across North America. Other initiatives include using technology such as our robust video surveillance camera system to proactively observe some of the more problematic areas of our campus in an attempt to interrupt the opportunity for a crime to be committed.

Additionally, moving forward in replacing our current records management system (RMS) will be key to providing the UNM police department with advanced capabilities such as enhancing our processes for police reports, crime reporting, crime mapping, and other data capabilities that are inadequate with our current records management system. The new RMS promises to not only meet our needs but will also have connectivity with other partner law enforcement agencies within the metro area and will move us closer to providing real-time data for both police officers responding to calls for service and other community partners who provide invaluable resources for our community.

All the efforts instituted this past fiscal year provide a means to better respond to the safety and security concerns of the campus. The department responded to 35,471 calls for service, which is approximately an 18% increase from the last fiscal year. The department also received at least 27 letters of appreciation

and/or emails expressing appreciation for our department. Individual officers, dispatchers, staff, and our department as a whole were recognized for outstanding efforts, to include recognition of participation in various trainings across campus like safety and RA training. No formal citizen complaints were received by UNMPD during this fiscal year.

ii. **SIGNIFICANT ACCOMPLISHMENTS**

- **Community Engagement:** In an effort to continue to work on strategies to engage not only members of our community but also our partners surrounding our campus, we have included more members of the university-wide community in problem-solving, especially by participating in the Nob Hill/UNM Public Safety Project ECHO, which involves the newly opened Albuquerque Police Department (APD) University Area Command Substation. The commitment of the city to expand APD's resources to one of the busiest sectors in the city has already had a positive effect on campus with visibility and directed patrols in problem areas. The "mini-police substation" (mini-sub), which opened last year at the Student Union Building is also still providing our community with an opportunity to engage with members of our department and provide a means to gather information on one of the busiest areas of campus. The Campus Watch program is a newly evolving initiative that divides the campus into zones to enhance the exchange of information to a more localized area in an effort to improve problematic areas around campus. Building coordinators will be one of the most important driving forces in the success of the program as they connect with their respective zone partners with the goal of disseminating safety information and working with police to address crime and other safety issues around campus. Sharing information is essential to heighten awareness and identify the appropriate resources required for various situations. By fostering communication with staff who work varied hours, such as custodial staff and groundskeepers, the zones can develop a comprehensive understanding of safety issues and work collectively to address campus safety concerns within and across zones.
- **Staffing:** The most persistent issue that the police department faced during this past fiscal year was recruiting and filling positions for both police officers and dispatchers. Since other police departments in the metro area are aggressively recruiting police officers and police dispatchers with better compensation and benefits packages, the challenge to recruit and retain quality police officers and dispatchers continues to be a struggle. We actually made significant strides in our recruitment efforts hiring seven (7) new police officers within this past fiscal year, bringing our department up to full staff but it was short-lived. Two (2) police officers resigned to join another law enforcement agency. During this past fiscal year, we acquired approval to increase our staffing

for police officers and are in the process of recruiting and hiring potential candidates. We were also successful in adjusting our entry-level compensation for police dispatchers after losing two (2) dispatchers and having no viable candidates in our applicant pool, which definitely placed us in a better position to recruit and fill all of our current vacancies in Dispatch. We continue to use social media to advertise for police recruit, lateral, and dispatch positions. However, our most effective recruiting tool is our police officers and dispatchers talking to people about a career in public safety. Recruiting qualified applicants remains not only a local but also a nationwide challenge that will continue well into the near future.

- **Technology:** The department was successful in securing monies for the Mark43 RMS. One of the strengths of this technology is the cloud-native platform, which allows for upgrades and enhancements at no additional costs. More importantly, this platform will allow us to leverage a more effective data-driven system that will provide us with better information on problematic areas on campus. Also, exchanging information with other local police departments using this technology is a plus for our department, especially in following up with criminal investigations and seamlessly gathering information together from similar crimes in the metro area. We were also able to secure some funding for the replacement of all 41 cameras listed by the Federal Government as a National Security Risk. Thus, we are now in compliance with the National Defense Authorization Act. Additionally, forty (40) other video surveillance system projects were started during this past fiscal year with a completion of seventeen (17). (The cameras on north campus that were installed three (3) years ago are now visible on the Enterprise Video Security System. This was a laborious collaborative effort to get this done. We also increased the video coverage on the Roma walkway between the Redondo circle and the Social Sciences building. Four (4) cameras were added, and five (5) existing cameras were changed to multi head cameras.) Moreover, twenty-one (21) access control projects were started with eight (8) completed by the end of the year. The video surveillance system and access control projects totaled \$973,049.94. Lastly, an MOU was finalized for the migration of IT services within UNMPD to central IT (UNMIT).
- **Training:** *Basic Police Training/Police Dispatchers* - We have had a very successful partnership with the Central New Mexico Law Enforcement Academy (CNMLEA) in training our police recruits. CNMLEA is accredited by the New Mexico Law Enforcement Academy as a regional/satellite academy. This past fiscal year we sent one (1) police applicant to CNMLEA and he successfully graduated in May 2023. Two (2) other police recruits are in the process for the next recruit class, which will begin in the Fall of 2023. We did not have any police dispatcher

applicants that needed the basic certification training. However, CNMLEA will be more cost-effective and convenient for our department rather than sending them to the NMLEA in Santa Fe. *Advanced Training* - the staff attended over 1,147 hours of advanced training. One of the most note-worthy advanced training courses is the Detective Academy Course, which was hosted by the Albuquerque Police Department. The academy began in 2021 to develop police officers' skills in producing successful criminal investigations. The course includes classroom lectures and scenario-based training. Officers developed their proficiencies in interviewing victims, witnesses, and suspects at mock crime scenes and also sharpened their skills in presenting these cases in court.

- Update equipment/furnishings: We were able to replace approximately seven (7) of the fifteen (15) X-26/X-26P TASERS with new X7 TASERS. Since TASERS are a high dollar item, we will continue to plan on incrementally replacing outdated TASERS to avoid adversely affecting our operating budget. UNM Health and Health Sciences also provided us with \$10,000 in funding to update our outdated training room, which is also used as an Emergency Operations Center.

iii. FUTURE PLANS

- Campus Safety Aide (CSA) Program: UNMPD plans to develop a public safety program that targets those interested in exploring a career in public safety. The program will provide participants with training and work experience to prepare them for Campus Safety Aides. CSAs will be unarmed police employees who will assist with traffic control, incident informational reporting, and other low priority duties, which will free up police officers for other higher priority duties. This program can also provide a pathway for public safety and assist the department in their recruiting efforts.
- Increase Administrative Staff: There are many administrative duties within the police department that are being completed by sworn police officers with little to no administrative support, which can be very time-consuming and an inefficient use of resources. Most police departments have civilian staff that handle administrative duties, which better serves the overall operation of a police department. Duties include but are not limited to: File maintenance and tracking for all internal documents including all files related to recruitment, selection, training, etc.; Assist with the departmental planning and the coordination of programs, presentations, special events, and program/project development to include safety training talks and other community safety presentations. Additional duties include assisting in preparing crime analysis reports and other administrative duties as needed.
- Technology: Identify consistent funding source for campus security projects and maintenance. We will continue to identify areas that need

additional security cameras and work with our vendor to plan video coverage. We will also continue to seek funding for access control installation across campus. Most of our buildings have not been rekeyed in many years and keys have been lost, reducing the security of the buildings on campus. Additionally, we will continue to work with other departments on campus to review and improve campus security.

- Action Plan – Engagement Survey: UNM partnered with an independent research-based consulting company to better understand the needs of UNM staff, which is in alignment with UNM2040 objectives of developing and supporting a stable and high-quality workforce. As a result, the police department’s executive command will develop an action plan for the coming year to fulfill this objective.
- Police Building: Funding was secured for a new police facility. So, members of the police department will be working with both the project manager from the UNM Planning, Design & Construction department as well as members of the Hartman Majewski Design Group for this project over the next year.



Policy Office

POLICY.UNM.EDU



Policy Officer
SIDNEY MASON
COON

Mission and Vision

Mission

The University of New Mexico Policy Office oversees the development, revision, and issuance of the Regents' Policy Manual and the University Administrative Policy and Procedures Manual, while serving as the official repository for historical and current versions of the policies.

Vision

The University of New Mexico Policy Office strives to cultivate a collaborative and inclusive environment to create policies that are the foundation for mitigating risk, enhancing efficiency, promoting compliance with laws and regulations, and supporting the wellbeing of the University community.

Organizational Chart



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i. EXECUTIVE SUMMARY

The University Policy Office is an institutional-wide department, reporting to the Executive Vice President for Finance and Administration, that oversees the development, revision, and issuance of the Regents' Policy Manual (RPM) and the University Administrative Policy and Procedures Manual (UAP), while also serving as the official repository for current and historical versions of the policies.

In Fiscal Year 2022-2023, the Policy Office facilitated major revisions to nineteen policies in the UAP and two policies in the RPM, and issued three new policies, combined.

In addition to the list of substantive policy revisions in a subsequent section of this report, many University Administrative Policy and Procedures draft recommendations were under committee or taskforce review and discussion at the end of Fiscal Year 2022-2023. A small sampling of these include major revisions to several policies in the UAP 4000 Series on "Procurement", Education Benefits, Allocation and Assignment of Space, and new draft policies on Foreign Gifts, Privacy, Conflict of Interest, and Conflict of Commitment.

The Policy Office continued its commitment to process improvement and to UNM 2040: Opportunity Defined, Goal Three: Inclusive Excellence, by incorporating an equity and inclusion review in the initial policy review process, and by creating a university-wide taskforce designed to review and assess all existing UAP with an equity and inclusion lens.

The Policy Office's Fiscal Year 2022-2023 I&G Original Base Budget Allocation was \$166,919. The Policy Office has a lean administrative budget, with the majority of expenses allocated for personnel costs. The remaining expenses are comprised of general administrative costs such as shared copier rental, office supplies and equipment, website maintenance, and professional development.

ii. SIGNIFICANT ACCOMPLISHMENTS

The Policy Office had several significant accomplishments in Fiscal Year 2022-2023.

Working with university-wide core offices and constituents, the Policy Office issued several new and substantively revised policies in the University Administrative Policy and Procedures Manual (UAP) and Regents' Policy Manual (RPM).

- New Policies:
 - RPM 1.9 (“Board of Regents’ Office”)
 - UAP 3245 (“Remote Work”)
 - UAP 6140 (“Video Security Systems”)
- Substantively Revised Policies:
 - RPM 2.16 (“Legal Services for the University”)
 - PRM 7.21 (“Investment of Operational Funds and Bond Proceeds”)
 - UAP 2010 (“Contracts Signature Authority”)
 - UAP 2215 (“Consensual Sexual or Romantic Relationships”)
 - UAP 2500 (“Acceptable Information and Information System Use”)
 - UAP 2520 (“Accessing and Safeguarding Personally Identifiable and Controlled Information”)
 - UAP 2635 (“Payroll Deductions, W-2s, and Tax Reporting”)
 - UAP 2650 (“Payment When Terminating Employment”)
 - UAP 2670 (“Garnishments and Other Wage Withholdings”)
 - UAP 3200 (“Employee Classification”)
 - UAP 3210 (“Recruitment and Hiring”)
 - UAP 3215 (“Performance Improvement”)
 - UAP 3270 (“Suspected Impairment”)
 - UAP 3300 (“Paid Time”)
 - UAP 3405 (“Holidays”)
 - UAP 3500 (“Wage and Salary Administration”)
 - UAP 3635 (“Unemployment Compensation”)
 - UAP 4020 (“New Employee Relocation Allowance”)
 - UAP 7610 (“Investment Management”)
 - UAP 7710 (“Property Management and Control”)
 - UAP 7730 (“Taking University Property off Campus”)

With newly approved authority given to the University Policy Officer by the Board of Regents, several policies within the Regents’ and Administrative Policy and Procedures Manuals were corrected for

departmental or other unit names, position titles, errors, and URL links, and references.

In Fiscal Year 2022-2023, the Policy Office continued its commitment to process improvement and to UNM 2040 Opportunity Defined, Goal Three: Inclusive Excellence, by expanding the UAP Policy Review Committee to include membership from the Division of Equity and Inclusion. Because the goal of the Policy Review Committee is to review and assess new policy proposals and policy revisions submitted to the Policy Office, representation from the Division of Equity and Inclusion is designed to help ensure and strengthen the equity and inclusion infrastructure across the university via all new and revised policies.

Also in alignment with UNM 2040, Goal Three: Inclusive Excellence, the Policy Office created the university-wide Policy Equity and Inclusion Lens (PEIL) Taskforce, with the charge to review all existing University Administrative Policies for equity and inclusion, and the possibility of disparate impact on our community members. The PEIL Taskforce was established in late Fall 2022, with membership comprised of the following departments:

- African American Student Services
- American Indian Student Services
- Associated Students at the University of New Mexico (ASUNM)
- Branch Campus – Valencia
- College Enrichment & Outreach Program (AAPIRC)
- Compliance, Ethics & Equal Opportunity (ADA)
- El Centro de la Raza
- Faculty Relations, Health Sciences Center (HSC)
- Faculty Senate
- Graduate and Professional Student Association (GPSA)
- Institute for the Study of “Race” and Social Justice
- Institutional Climate and Equity, Law Library
- Human Resources
- LGBTQ Resource Center
- Staff Council
- Office of University Council (Non-Voting, Consulting Member)
- Veteran and Military Resource Center
- University Policy Office (Taskforce Chair)
- Women’s Resource Center

In support of, and alignment with UNM 2040 Opportunity Defined, Goal 5: One University, the Policy Office began the practice of assigning one

policy/process owner per UAP. Under the new practice, and in accordance with UAP 1100 (“Development and Approval of Administrative Policies”), at the time of policy revision and when multiple policy/process owners exist, the Policy Office coordinates with existing owners to assign a single position to serve as the policy/process owner for the functions covered by the policy. This has been critical for expediency when revisions were required, as well as overall policy interpretation on a day-to-day basis.

iii. **FUTURE PLANS**

In Fiscal Year 2023-2024, the Policy Office plans to move the university-wide Policy Equity and Inclusion Lens Taskforce into Phase One of policy review. Phase One will allow for an equity and inclusion review of each existing University Administrative Policy (approximately 200) by half of the taskforce members. Taskforce members will make recommendations on suggested revisions to improve our policies from equity and inclusion perspective, and will certify review and recommendations for each represented department or unit.

In the coming fiscal year, considerable work is planned for both major revisions and routine maintenance on University Administrative Policies. Proposed policy revisions and new policy requests stemming from the recommendations of the eleven (11) subcommittees of the President’s Ethics Taskforce remain under review by the Office of the University Counsel, and should be available for the Policy Office to begin work on these in 2024.

The Policy Office plans to upgrade its existing website to a more current version for ADA compliance and mobile-friendly access, contract with third-party policy management and version control software, implement workflow and systematic/regular policy review, and move the Policy Office website to a new server. Outside the scope of this project, but equally critical, are plans to conduct a full audit of all historical policies and documentation for completeness, correct or catalog any discrepancies, and re-organize the hardcopy and electronic files for consistency.

Lastly, the Policy Office will continue to collaborate with the Office of the University Secretary and the Dean of Students on policy alignment between the University Administrative Policy and Procedures Manual, the Faculty Handbook, and Pathfinder, aligning with the Regents’ Policy Manual when discrepancies are identified.



OFFICE OF THE
EXECUTIVE VICE PRESIDENT FOR
FINANCE & ADMINISTRATION