

The Brief

Newsletter for Business Services, Fall 2009

BUSINESS SERVICES DIVERSITY TEAM

By Manuel Balesteri

There is a small group of Business Services employees who have been meeting on a quarterly basis since mid 2006. This group's charge is to promote and facilitate the University and Finance and Administration's Diversity initiative: "The University's vision identifies diversity as one of five key core values necessary for success and achievement of its mission. The Finance and Administration Division (F&A) vision statement, "Laying the foundation for University success," provides the fundamental basis for our diversity initiative. We are the employees who support OSU through collaborative and entrepreneurial stewardship of public, human, business, and facilities resources. We do this by providing service and direction to our campus constituents, students, and external customers. Without a diverse organization, our ability to create a foundation for success for ourselves as well as the University is significantly diminished.

The group led by Rae Delay (Operations Manager), is comprised of Teresa Fordham (Motor pool), Bob Senter (Printing & Mailing), Steve Maze (Printing & Mailing) Manuel Balesteri (Procurement), and Pete Lepre (Recycling Manager). Meeting on a bi-monthly basis, the group has been involved in setting up some basic processes centered around new employee orientation. An OSU Welcoming Packet has been developed which is a way to introduce the new employee to OSU with maps, calendars, organization charts, self-guided tour information, and a variety of other goodies and tips to make the new employee feel welcome.

Another action developed by the group is an employee integration process. The group routinely surveys new employees and asks how their "onboarding" experience was when they came to Business Services. From their feedback the group attempts to improve and refine the current process and continue to make the experience better as a new employee.

A Director led tour of campus was one of the ideas coming out of the group. With employee feedback, this tour led by our Director, Brian Thorsness, has proved to be a success and great physical orientation to our beautiful campus.

Always looking for new training opportunities for the committee and other Business Services employees, enhancing employee recognition, and improving employee luncheons are other items the group is addressing.

If you have any thoughts our suggestions for the group, please direct them to Rae or any of the group members.

OPERATIONS DRIVER TRAINING IMPLEMENTED

By Rae DeLay

Driving a large vehicle takes skill and practice and now a little extra training. The Operations staff not only need to drive a large vehicle but also must deal with the narrow streets and congested road ways on campus. Staff members that drive a large truck must now go through training that involves a lecture format and behind the wheel observation. The lecture is based on the ODOT driver training and is 2.5 hours long. Once the employee has completed the lecture they demonstrate their driving skills to the trainer. The Behind the Wheel training involves safety, maneuvering, campus specific issues and overall handling of the vehicle.

Campus Specific issues:

- The maximum speed for Operations trucks on Campus is 15 miles an hour.
- Avoiding Jefferson and congested areas, especially at the time of class changes.
- Using back up assistance whenever going in reverse.
- Pedestrians and bicyclists on the road way.

Oregon State
UNIVERSITY

SAVE THE DATE:

University Day
September, 24th 2009

Printing & Mailing Open House
Friday, October 30th, 2009

Training Days
*Wednesday & Thursday, November
11th & 12th, 2009*

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CONTRACTS TYPE CHARACTERISTICS MATRIX

By Tamara Bronson

Since the contracting function was reorganized in the summer of 2006, the Office of Sponsored Programs (OSP) and Procurement and Contract Services (PaCS) have reviewed agreements on a case-by-case basis to determine if that agreement is more appropriately treated as a Sponsored Agreement or as a Fee Book Services Agreement. Both offices acknowledged there was no guidance available to help faculty or staff determine characteristics of each type of agreement and that some type of written guidance should exist.

A year after the reorganization, OSP and PaCS joined with the Office of Post Award Administration (OPAA) to work in earnest to develop a matrix of characteristics to help faculty and staff determine whether an agreement would be a Sponsored Agreement or Fee Book Services Agreement. As a result of working together we learned that there is a perception that only research projects are sponsored projects and that we need to get away from the term "Fee Book Services" since fee book rates are used in many different types of agreements. Two new agreements were created to replace the Fee Book Services Agreement, the "Testing Services Agreement" and the "Academic Services Agreement"

Our offices formalized a "Contract Type Characteristics Matrix" and tested this matrix against sample agreements from both OSP and PaCS. The Contract Type Characteristics Matrix was rolled out to the OSU community in November 2008 and is posted on the Sponsored Programs website at: <http://oregonstate.edu/research/osp/submission/Contract%20Type%20Characteristics.pdf>. This matrix provides guidance to faculty and staff in determining the type of agreement to use and which office would process the agreement.

PART II - IT'LL "DRIVE" YOU CRAZY

Rental Vehicles and University Business

By Joyce Fred

The State of Oregon has entered into a statewide vehicle rental agreement with Enterprise that all state agencies may participate in. However, alternative rental car companies may be used in lieu of Enterprise. For this article, the OSU Motor Pool is not considered an alternative rental car company (all OSU Motor Pool rental vehicles are classified as a state vehicle and covered by insurance via the State of Oregon Insurance Fund, unless the vehicle is not used properly). The below information highlights a few things employees and students need to be aware of when using rental vehicles for university business.

State Enterprise Rental Agreement. OSU employees may rent vehicles on the State Enterprise Rental Vehicle Agreement for official university (state) business ONLY. The agreement permits Enterprise to bill the department directly for the rental costs when using the state contract number. Students may NOT rent vehicles under this agreement; however, a student can be listed as a driver for an Enterprise rental when an OSU employee rents the vehicle. Under the agreement, the State of Oregon has negotiated rental rates that includes primary insurance coverage for liability and physical damage (commonly referred to as comprehensive and collision) with no deductible. Employees and students using rental vehicles on official university business under this agreement are subject to State Vehicle Use Rules during use.

These rules are found in the Oregon Administrative Rules under Section 125-155. It is critical for employees and students to understand these Use Rules prior to renting Enterprise vehicles to avoid being held personally liable for injuries or damages that may result from an accident. A general rule of thumb is that if the activity is not permitted in an OSU Motor Pool or Departmental owned vehicle, it cannot be permitted in an Enterprise Rental Vehicle (if rented under the agreement). Highlights of these rules include:

- No transportation of family members.
- No personal use of the vehicle whatsoever (no business/personal mixed use).
- No transportation of prohibited items such as alcohol, firearms, etc.
- No unauthorized drivers (operators MUST have signed an OSU Driver Authorization Form and meet all the qualifications including the Van Safety Certification for van rentals).

Mixed Use and Non-Enterprise Rental Vehicles. The most common use of rental vehicles that could potentially result in an employee being held personally liable is violation of items 1 and 2 above. If an employee would like to transport family members or use a rental vehicle for mixed use (i.e. personal and state business), Enterprise vehicles can be used at the Enterprise Leisure rental rate, charged to the employee's personal credit card and the cost is reimbursed to the employee. If the Leisure rate is used, it is important to understand that an employee or student's insurance coverage is always considered primary, even while conducting official university business. If an alternative rental car company is being used in lieu of Enterprise, the above conditions still apply. The rental is paid for in the same manner with a personal credit card, with the cost being reimbursable. It is important to know that the university will not:

- reimburse employees, students, (or other private owners) or their insurance company for any liability claim paid by their auto insurance policy.
- pay for physical damage to the vehicle or any deductibles (the Collision Damage Waiver (CDW) or Limited Damage Waiver (LDW) should be purchased and is reimbursable).
- reimburse employees or students for increased insurance rates that insurance companies impose due to the vehicle being used for business purposes.
- reimburse employees or students for increased premiums due to accidents incurred while on official university business.
- be responsible for cancellation of insurance coverage due to the vehicle being used for business purposes.
- be responsible for any injuries or damages to passengers that an employee or student transports (the employee or student assumes all responsibility).

With the recent passage of Senate Bill 311 which increases OSU Tort Liability Limitations from \$100K per person/\$500K per occurrence to \$1.5M per person/\$3 M per occurrence, please report ANY accidents that occur in a rented, privately owned, or borrowed vehicle while you are conducting university business immediately to the Office of Risk Management at 541-737-7350.

UPDATES FROM THE STUDENT SUSTAINABILITY INITIATIVE

By Andrea Norris

The 2008-09 academic year was a busy year for the Student Sustainability Initiative (SSI), a student fee-funded organization supported by Business Services. The SSI supports student efforts to create a sustainable community at OSU through education, opportunity, and action. The SSI took on many projects, events, and campaigns this year, including the Corvallis Bicycle Collective, Sustainable Energy Revolving Loan Fund, and Permaculture Garden.

The Corvallis Bicycle Collective is a community space which helps people acquire and maintain bicycles and other modes of human-powered transportation. The shop was opened at the Student Sustainability Center in early 2009 by a group of volunteers passionate about human-powered transport; more volunteers are always getting involved, from both the OSU and Corvallis community. The program takes in used bicycles from the community, fixes and rebuilds them, and sells them in exchange for cash, HOURS (local currency facilitated by the HOUR Exchange), trade, or volunteer labor. The program not only promotes alternatives to fossil fuel-based transport, but also reduces waste – taking in unused bikes and their parts and reusing them. Unusable parts are recycled by Campus Recycling. The shop is open Fridays, Saturdays, and Sundays at noon to 4 p.m. and Wednesdays 2 to 6 p.m., and all are welcome to drop in to get help maintaining their own bike, build and/or buy a new bike, or donate items.

The Sustainable Energy Revolving Loan Fund is an initiative that will take a portion of student fees currently being used to buy renewable energy for OSU and invest it in a fund to be used for energy efficiency projects and local renewable energy projects at OSU. The subsequent reduction in utility bills from energy conservation will be used to pay back the original loan and help grow the fund. The Student Sustainability Initiative fee board, with the guidance of Business Services, will solicit and evaluate proposals from campus entities who would like to apply for funds for cost-saving energy projects such as better lighting, weatherization, or installation of solar panels. Overall, the revolving loan fund is a mechanism for simultaneously promoting economic and environmental sustainability on campus.

The Permaculture Garden is a demonstration garden plot on the north side of the Student Sustainability Center that showcases the principles of permaculture. Permaculture is both a technique and a philosophy of integrating human life with the natural environment, forming landscapes that regenerate themselves and are useful to people. The garden, which was created this year by SSI volunteers and a Permaculture Design course in the Horticulture Department, currently includes fruit trees, vegetables, and a bioswale to divert rainwater to crops. The installation of the garden was funded with an SSI project grant and coordinated by a new club called the OSU Permaculture Alliance.

To learn more about these projects or to volunteer, contact the SSI at (541) 753-4072 or student.sustainability@oregonstate.edu, visit <http://recycle.oregonstate.edu/ssi>, or stop by the Student Sustainability Center at 738 SW 15th St.



Student Sustainability Center

TRAVEL SERVICES REQUEST FOR PROPOSAL

By Manuel Balesteri

Best Practices in the “corporate” and large organization world of travel management shows a move to a centralized function and mandated use of agency contracts. This includes a centralized travel office managed by either organization or travel agency staff. It also includes streamlined processes to take advantage of technology. From as simple as having all travelers book their trips online with automated approvals to the more complex integration of corporate travel cards and travel expense reporting and reimbursement systems.

Now rewind to the early 2000's when OSU competed our travel business and awarded two contracts to our current agency providers. Azumano, a large regional provider who also has the State of Oregon contract, and Teel's Travel, a Corvallis based privately held company are OSU's contracted travel agencies. Both agencies have done an admirable job over the years.

With contracts expiring in the fall however, the Procurement and Contracts group is hard at work and in the middle of surveying the market and determining who can best meet our current and future requirements. Our new direction in this Request for Proposal process is to require our prospective vendors to submit a vision for the future which includes how they might incorporate as many of the best practices the industry has to offer. In addition, we are asking vendors to actively assist in any change management OSU may need. To gain input and advice from OSU constituents, PaCS sought out a good cross section and representation from various departments on campus including large users like Athletics for the RFP evaluation committee. We were happy to get several volunteers who will be representing a large group of travelers on campus on this evaluation committee.

Stay tuned for more to come as we move toward a more time and cost efficient model, over time and with plenty of opportunity for input along the way.



PERSONAL/PROFESSIONAL SERVICES CONTRACT VS. SUBAWARD

By Katie Lancker and Tamara Bronson

Both the Office of Sponsored Programs (“OSP”) and Procurement and Contract Services (“PaCS”) establish contracts for services and often times it can be confusing trying to determine the difference between a Subaward issued by OSP and a Personal/Professional Services Contract (PPSC) issued from PaCS. The basic rule would be that if the service is not related to grant funded research already under the oversight of OSP, it most probably would be a PPSC issued by PaCS.

OSP generates Subawards for certain critical elements of research services which may not be available at OSU and outsourcing for such services was included in the grant proposal. The Subaward, is the contract mechanism allowing OSU to transfer terms, conditions and funding from the grant to another party for the outsourced research services. Such a mechanism grants the contractor the same requirements and authority that OSU has under the research grant. Keep in mind that Subawards can only be issued to companies and may not be issued to individuals.

PPSCs are issued by PaCS for the purchase of services performed in a manner and method determined by the contractor in accordance with OSU’s terms and conditions. The requirements and authority of the original grant would not apply. A PPSC should be issued when the service being purchased, in its nature, may be performed for multiple clients and OSU requires no programmatic effort from the contractor, only the service performed. The type of the service being performed would not be exclusive to a particular research project for OSU, but offered to the contractor’s other clientele as well.

Be advised that, although a service is named within a grant, services contracted on a PPSC must follow the public procurement rules and the purchase of the services are subject to a competitive process if the cost such services exceeds \$25,000. PaCS advises allowing time for such process as no work may begin until a contract is executed by all parties.

PROCUREMENT AND CONTRACTS ETHICS

By Kelly Kozisek

As public officials, (OSU employees are by definition public officials) it is our duty to avoid even the appearance of a conflict of interest. A conflict of interest could involve anything from public officials seeking to contract with relatives, to receiving gifts from vendors, to accepting vendor discounts that would not otherwise be available if it weren’t for our status as public officials.

The provisions in Oregon Government Ethics law restrict some choices, decisions or actions that a public official may make. For instance, public officials are prohibited from using or attempting to use their positions to gain a financial benefit or to avoid a financial cost for themselves, a relative or their businesses if the opportunity is available only because of the position held by the public official. [ORS 244.040(1)]

There are provisions in Chapter 244 of the Oregon Revised Statutes that pertains to the subject of ethics and conflicts of interest. Below is a small sampling of guidelines and provisions as detailed in the Guide for Public Officials: http://www.oregon.gov/OGEC/forms_publications.shtml

- A public official, a relative of a public official or a member of the public official's household may not accept gifts that exceed \$50 from a source[1] that has a legislative or administrative interest in the public official's governmental agency. [ORS 244.040(2)(e)] (Note that the \$50 amount is a cumulative amount throughout a year)
- Public officials and candidates may not accept the payment of expenses for entertainment nor can a source offer such paid expenses. [ORS 244.025(4) and see entertainment defined in OAR 199-005-0025(4)]

ORS 244.040(1)(a) prohibits public officials (all state employees) from obtaining personal financial benefit if that benefit arises only because of holding the public position.

The Research Office also manages conflict of interest issues as they pertain to research. For more information be sure to review their policies: http://oregonstate.edu/research/ori/coi/coi_policy.htm

Take some time to review the If you have any doubts or questions about ethics or conflicts of interest as it pertains to procurement and procurement contracting, feel free to contact the Procurement and Contract Manager at 737-2067.

MERCHANT EXPO 2009 RECAP

By Shannon Fanourakis

- “This was my first one and I enjoyed it very much.”
- “Another fine job/show!”
- “The Expo itself was great. A good variety of merchants...”

These are some of the comments received about the 13th annual OSU Merchant Expo which was held June 4, 2009. With almost 60 vendor booths and 750 OSU attendees this annual event brought together vendors who sell a wide variety of products and services together with OSU departmental personnel responsible for purchasing. Freebies, gift certificates, door prizes, product demos and a free lunch catered by Papa's Pizza were the highlights again this year.

Please keep your calendar open for next year's Expo to be held on June 3, 2010 at the LaSells Stewart Center.

CONSTRUCTION PROJECT UPDATE

By Donna Thwing

2009 has been an amazingly busy year for construction contracting on campus. We have completed Phase 2 of the Reser Stadium Expansion and the related Sports Performance Facility, Magruder Hall Large Animal Hospital, Weatherford Hall (exterior restoration), Goss Stadium Expansion, Nash Hall seismic upgrades, and Apperson Hall renovation.

Ongoing projects include the Energy Center (new building on 35th Street and related infrastructure work on Jefferson and some other areas of campus), and the Education Hall seismic upgrade and Nash Hall interior renovation are just starting up. Construction will also be starting soon on the new Linus Pauling Science Center building. Not actually on campus, but still a major OSU project, is the ONAMI project currently under construction on the Hewlett Packard campus in Corvallis. In March, the University received a substantial allocation from the legislature this year the Go Oregon! Economic Stimulus program, and projects include renovations to Heckart and Reed halls, the 4th Floor of Waldo Hall, exterior painting at Gill Coliseum, many projects at the outlying Agricultural Experiment Stations around the state, as well as a number of projects at the Hatfield Marine Science Center in Newport. As always, there are a number of smaller projects happening in many buildings on campus.

See how many of these projects that you can spot as you stroll around campus!

SURPLUS PROPERTY IMPLEMENTS NEW INVENTORY AND SALES MANAGEMENT SYSTEM

By Patsy Hendricks

In March of 2008, Surplus Property introduced a new data base for inventory and sales management. The new system is Web based and replaces a 10 year old Access Data Base. Being Web base allows for online sales and customer interface, eventually saving time and money for the University. Look for future online inventory listings.

Surplus must maintain historically data on all inventory and sales to comply with State audit requirements. This information is now available in a usable format to help make planning and budget decisions.

Surplus Property processes inventory on behalf of OSU and 30+ governmental agencies. Surplus Property is a self sustaining department so a flat fee and a % are retained to cover the cost of handling and selling items. The departments receive the remaining funds after the sale and processing fees. We rely on the data base to determine the dollars sent to departments.

All customers are set up with a customer profile. Please contact the Surplus Property Office for more information.

Surplus Property Office:
(541) 737-7347 or email Surplus.oregonstate.edu

Apperson Hall Renovation



BUSINESS SERVICES NEW EMPLOYEE PROFILES

By: Donna Thwing // Photo Credit: Alex Nguyen

The following are staff new to Business Services.

Business Services Accounting

Business Services Accounting was delighted to welcome three new members into the organization over the last year.



Gayle Smith

Gayle joined the Business Services Accounting team in June 2008 as an Accountant 1, and provides primary accounting support for the Printing & Mailing service center. Prior to coming to OSU, Gayle spent 21 years at Hewlett-Packard primarily in roles involving market demand planning and supplier management.



Shanda Addington

Shanda joined the Business Services Accounting Team in December 2008, and continues to provide accounting / HR support to Conference Services. Shanda has worked in OSU accounting roles for over 15 years, and spent the last 3 years supporting the Conference Services business. Shanda enjoys the conference business, including

the involvement with events, speakers, artists, and the ability to work closely with clients across OSU.



Janna Storm

Janna has been with OSU Business Affairs for over 8 years serving in the Student Accounts office. Janna has filled an Accountant 1 position that will work closely with OSU's Fixed Asset Manager in support of the investment we've made in fixed assets. When not at work, Janna enjoys time with her two teenage kids, husband

and dogs. She also is an avid runner, having participated in the "Hood To Coast" relay for 5 out of the last 7 years!

Procurement and Contract Services (PaCS)



Scott Lommers

After a year-long search for the perfect Northwest community, Scott, his wife Jennifer, his son Payton, and his daughter Carson, moved to Corvallis from the Skagit Valley, Washington area in September of 2008. In October, Scott started working in the Procurement and Contract Services office as a Procurement Analyst. After six

years of procurement in the private manufacturing sector, the challenges and rewards of public procurement at OSU were a welcome change. When not at the PaCS office, Scott can most often be found swimming, biking or running and knows most of the Dixon Rec. Center staff by name. Once in a while, he even puts all three sports together and competes in triathlons. Scott also enjoys updating his blog on running and writing articles for RaceCenter NW magazine. Scott and his family also love heading to the coast and playing in the ocean.

Business Services Operations



Rae DeLay

Rae DeLay joined Business services as the Operations Manager in October 2008. She is an alumni of OSU having received a BA in Business, BS in Education and a MBA. Much of her work experience has been in Logistics, primarily 18 years at Hewlett Packard, managing procurement, material handling, chemical and automated warehouses and manufacturing. Just prior to joining OSU she was a K-8 School teacher and still continues to teach for LBCC-Divers Education. Rae is active in the community and you can see her on the soccer field, at scouting events, and supporting the schools. She has two boys, 10 & 12, who keep her busy with camping, sports, and school work.



Moe Soriano

Moe Soriano started at Business Services as a Laborer 2 on Feb 16th, 2009. He has lived in Oregon since 1990. Moe is married with five children and five grand children. Moe is the Pastor of a Spanish Speaking Church, volunteers at South Side Community Outreach and with many other organizations.

Real Property Management



Nicole Neuschwander

An Albany native, Nicole joined Business Services in December of 2008 as a Real Property Manager after 7 years in commercial real estate in Portland and Salem. Nicole and husband Nate live in Albany and enjoy traveling, spending time with friends and of course, OSU Beaver Football...all of which is going to become challenging to fit in as they

have now welcomed their new baby boy Reid into their lives.

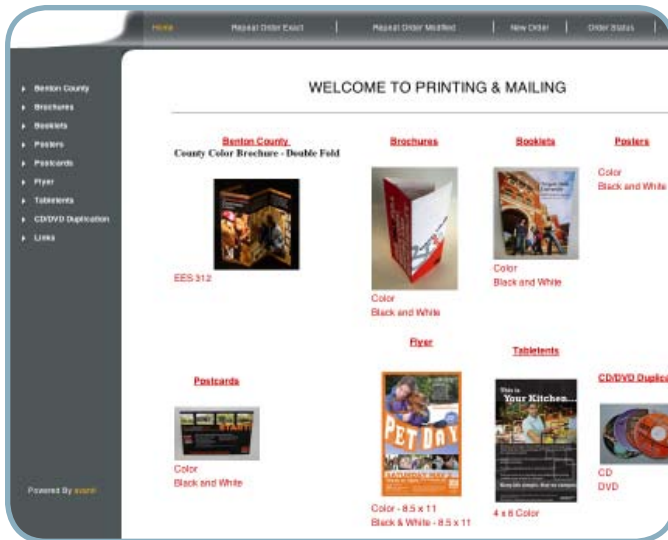
Risk Management



Sherri Hawkins

Sherri began working in the Business Services Risk Management office in January of this year. She is almost a Native Oregonian, moving here from Georgia when she was 4 years old. She came to OSU from the Telecommunications Industry, working for EmbarQ Telephone (formerly Sprint) for the past 7 years as a Business Analyst on their

National Team. Sherri's Risk Management experience comes from the Timber Manufacturing Industry and course work that she has completed through AICPCU. Sherri is currently working towards her Associates in Risk Management degree and tells us she loves this field of work. Sherri enjoys learning and exploring new things, reading, camping, spending time with her dog (Roxy) and her family.



NEW PRODUCTS FROM PRINTING AND MAILING SERVICES

On demand photo Albums and Calendars: Now you can go online and order your own album or calendar. Use your favorite images and share with friends. Create gifts for the hard to please individual. Start your own "support a student" campaign with photos that will make your parents give you a call. With a variety of available templates you can choose a collegiate theme and add in freshman, sophomore, Junior and or Senior Pages at your preference or go for the more casual look with color and create a mood. Perhaps the scrapbook look is your preference. Try a few options for yourself.



E-ACCESS ONLINE ORDERING

Printing and Mailing Services now offers price quotes and online ordering. To utilize this feature you can go to the OSU website @ <http://printmail.oregonstate.edu/> and look for the New E-Access link.

This link allows you to create some of your own estimates and all your orders online. For printing projects you order regularly you can determine the price in real time. This is a user friendly tool. We will set up your access logon and create templates based upon your needs. If you prefer send an email requesting a P&M Customer Service representative assist you with a test drive. This tool will give you the control to estimate or order at a moment's notice without having to make a call. "Yes" this allows you to consider your options 24/7.

PRINTING & MAILING ADDED TO GRAPHIC ARTS CURRICULUM

Printing and Mailing Services has collaborated with the Liberal Arts department and become part of the curriculum for the Graphic Arts Students. We will offer prepress and production instruction to these students. Our mission is to provide training which will supplement their portfolio by ascertaining that the wonderful projects they design will print to the designer and clients expectation.

