UNIVERSITY BUSINESS INSTITUTE

MID-YEAR REPORT

Fall 2011

Division of Administration and Finance
California State University Fullerton
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Introduction

Fall 2011 represents the seventh semester of operation for the University Business Institute (UBI), established to assist the university and its constituents in responding to the increasing complexity of managing the university’s resources. Courses offered represent a significant collective investment in professional development—an investment with a carefully-specified and unique objective—strengthening the ability and capacity of the university and its constituents in managing university financial and human resources. Seventy sessions were offered fall 2011 in the following categories: Financial Resource Management, Human Resource Management, Communication Skills, Productivity Enhancement, Personal Development and Wellness. Two additional areas of UBI will be reported separately by the operational leads: Online Training and Health and Safety. Six hundred and two participants (outside of those taking online or health and safety classes) across campus shared in professional development opportunities designed to improve understanding and application of university financial and human resource management policies and procedures as well as personal and professional proficiency in fall 2011.

Special appreciation is extended to the presenters who donate their time and share their expertise to benefit peers and the University—a true partnership and team effort to create a climate of clearer thinking, improved communication, and greater creativity. These partnerships have allowed us to expand our course offerings to accommodate increasing campus demand for training.

Key Highlights of the University Business Institute Fall 2011-12:

- Reorganized the overarching categories for professional development while retaining the emphasis in Financial and Human Resource Management and Health and Safety. Added Communication Skills, Productivity Enhancement, and Personal Development and Wellness.
The Managing Funds and Accounts certificate returns again this semester with only minor adjustments to this well-attended and highly-rated program designed for all individuals managing and coordinating department budgets, purchasing, funds and accounts. In addition to in-person workshops, two new online procurement card training modules were rolled out this fall, providing another option for initial and refresher procurement card training that can be accessed at any time.

Redesigned Optimizing Staff Performance certificate program intended for managers and department chairs supervising university staff, with new modules added in the areas of behavior-based interviewing, recognizing and motivating staff. In addition, redesign of a number of other modules based on feedback from previous participants.

Expanded the “Developing Our Future Professional” workshop to a series of three.


Introduced Peer Learning Communities for Excel and iPad, with opportunities to explore resources and tools while connecting with campus peers and discovering better ways of conducting business.

UBI By the Book Club returns this year as an informal mechanism for campus community members to discuss books related to effective resource management, communication, motivation and personal and professional development following a pilot program started in April 2011. Monthly book selections are featured for the year. Willem van der Pol, Director of Physical Plant volunteered to facilitate starting in November following the retirement of Elizabeth Housewright, a founding facilitator.

Launched the Brown Bag Lunch & Learn Webcast Series, a no-cost, on-demand/online external videos and webinars as an additional cost-effective mechanism to enhance professional growth and development. Brown Bag Lunch and Learn webcasts featuring online content provided by the American Management...
Association are facilitated by Leadership Development Program alums to provide opportunity to reflect and discuss practical applications.

- Learning Lynda.com was designed and introduced to build on the rich library of online training made available by the division of IT through Lynda.com by providing an informal computer lab environment to share knowledge and collaborate with peers.
- Some of the Health and Safety classes including the Campus Health and Safety Requirements, a legally mandated class for all employees, are now offered online. These statistics are not included in this report.
- Some of the most critical Financial Services courses including P-card are now being offered online. These data were not available for this report.

**Historical Perspective**

UBI offerings have grown fairly substantially since the institute was established three years ago and the trend continued this fall. A full complement of valuable programs is offered in core areas of financial services and human resource management. Participation in UBI offerings during just fall 2011 semester represents an increase of 124% since UBI’s inception in the fall 2008*. 

*Legally-mandated workshops historically offered by Environmental Health and Instructional Safety to improve understanding and application of campus health and safety management policies and procedures were folded into UBI in 2009/10 and are excluded from UBI percentage growth calculations. These classes along with the Online Class participation are also excluded from this mid-year report.
Participation by Category

- Productivity Enhancement category was added to UBI this year and has garnered the greatest participation percentage at 24%. The Peer Learning Communities for Excel and iPad introduced this year have been very well received along with the hands-on Photoshop with additional classes being added based on demand.
- Participation in workshops focused on financial resource management, human resource management, communication skills, and productivity enhancement are very equivalent.
- Health and Safety workshops and Online class participation numbers are being compiled for inclusion in the year-end UBI report but were not available at time of publication.

This chart does not include Health and Safety courses or any Online courses.
We had **290** unique participants in the University Business Institute this year.
UBI Fall 2011 Unique Participation by Division

- IT: 80
- President’s Office: 16
- SA: 34
- AA: 3
- A&F: 8
- UA: 149
Participant Assessment

Participant feedback is solicited following each workshop with participants being asked to anonymously rate the workshop in terms of meeting their expectations, being relevant and applicable. Almost five hundred evaluations were collected from the 70 workshops in Fall 2011. Over 96% of the respondents indicated that the workshops met their expectations and was relevant to their needs. Ninety-eight percent indicated that they would be applying the knowledge acquired in the workshop. Only 6% were neutral in their responses to any of the criterion and .4% felt that their expectations weren’t met or that the material was irrelevant.

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<th>Neutral</th>
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UBI Sessions by Format and Category

Seventy UBI workshops and other sessions were offered during fall 2011 which is a 40% increase over the offerings for the entire 2010-11 year. Seventy percent (56) of UBI sessions were offered in a classroom workshop format. The introduction of alternative formats increased the diversity of delivery with: five Peer Learning Communities, three Brown Bag Lunch and Learn webcasts, and six UBI By the Book groups. These alternative delivery methods represent 20% of the fall 2011 offerings versus a 8% of in 2010-2011.

- **Financial Resource Management** 17 sessions*
  - Workshops: 17

- **Human Resource Management** 12 sessions
  - Workshops: 10
  - By the Book: 2
    - Drive: The Surprising Truth About What Motivates Us (Daniel H. Pink)
    - Who Moved My Cheese (Spencer Johnson and Kenneth Blanchard)

- **Communication Skills** 17 sessions
  - Workshops: 9
  - Brown Bag Lunch & Learn: 1
    - Thinking on Your Feet
  - By the Book: 1
    - How to Win Friends and Influence People (Dale Carnegie)
  - Social Media: 4
Applications for Higher Education Professionals

Getting Started with Professional Facebook Pages (Hands-On)

Getting Started with Twitter (Hands-On)

Using LinkedIn (Hands-On)

- Train the Trainers: 2
  - Train the Trainer- Part 1
  - Train the Trainer- Part 2

- **Personal Development and Wellness**  8 sessions
  - Workshops: 5
  - By the Book: 1
    - *First Things First* (Stephen R. Covey, A.Roger Merrill and Rebecca R. Merrill)
  - Brown Bag Lunch & Learn: 2
    - *The Happiness Advantage: Linking Positive Mindset to Success*
    - *The 8th Habit: New Paradigm for Leadership*

- **Productivity Enhancement**  16 sessions
  - Workshops: 9
  - By the Book: 2
    - *Execution: The Discipline of Getting Things Done* (Larry Bossidy, Charles Burck and Ram Charan)
• First Break All the Rules: What the World’s Greatest Managers Do Differently (Marcus Buckingham and Curt Coffman)
  
  o Peer Learning Community: 5
    • Excel Peer Learning Community (3)
    • iPad Peer Learning Community (2)

*Not including online courses developed and offered in fall 2011 or Health and Safety Classes.

Prepared by Marian Sherman, University Business Institute March 2012.