

# **AFFIDAVITS**

STATE OF OHIO )  
 ) ss. AFFIDAVIT OF STEVEN LISS  
COUNTY OF CUYAHOGA )

Now comes Affiant, Steven Liss, and after being duly sworn according to law attests that:

1. I have personal knowledge of the facts set forth in this affidavit and am competent to testify as to these facts.
2. Banks instructed me to not accommodate Russell's medical condition and to hold him to the standard for employees without approved absences even though his medical condition had required weeks of approved medical leave.
3. I spoke with Banks several times about Russell's need for FMLA leave related to a surgery scheduled for September 2012.
4. After informing me of my termination, CSU made no effort to place me in open positions for which I was qualified.

[left intentionally blank]

*St Liss*

STEVEN LISS

Sworn to before me and subscribed in my presence this 17<sup>th</sup> day of October,  
2014.

*Joanne M. Pope*

NOTARY PUBLIC



**JOANNE M. POPE**  
NOTARY PUBLIC

STATE OF OHIO

My Comm. Expires March 17, 2018

STATE OF OHIO )  
 ) ss. AFFIDAVIT OF WILLIAM RUSSELL  
COUNTY OF CUYAHOGA )

Now comes Affiant, William Russell, and after being duly sworn according to law attests that:

1. I have personal knowledge of the facts set forth in this affidavit and am competent to testify as to these facts.

2. In late May or early June 2012, I met with Dr. Drnek. We discussed my health condition, including my heart condition, my need for surgery on my shoulder, and my need for 12 weeks of FMLA leave due to the required surgery.

3. Later in June 2012, I met with Dr. Drnek again and we again discussed my health condition, including my heart condition, my need for surgery on my shoulder, and my need for 12 weeks of FMLA leave due to the surgery scheduled for September 2012.

4. I informed Dr. Drnek that my surgery was scheduled for September 2012 and that I would need, and would be requesting FMLA leave. We also discussed my daughter's serious medical condition and whether I would need to take FMLA to be a caregiver for her and her young children.

5. I told Dr. Drnek that the discriminatory treatment I was receiving from Banks was exacerbating my physical condition.

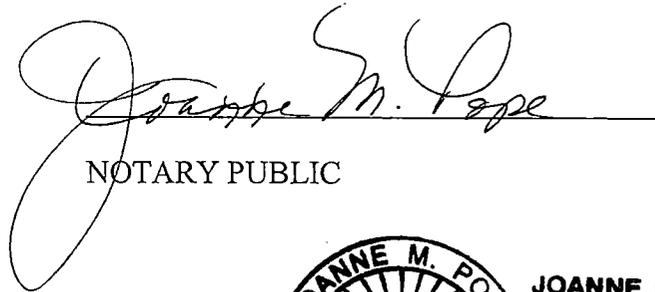
6. Dr. Drnek and I then walked to Dr. Banks' office to discuss these issues. Dr. Banks also knew about my health issues and that I would need FMLA. Rather discuss these issues, Dr. Banks threw me out of his office and said "Go back to your office and get healthy."

7. Both Dr. Drnek and Dr. Banks understood that I would need to take FMLA leave in September 2012 because we discussed these topics.



WILLIAM RUSSELL

Sworn to before me and subscribed in my presence this 14<sup>th</sup> day of October,  
2014.



NOTARY PUBLIC



**JOANNE M. POPE**  
NOTARY PUBLIC

STATE OF OHIO

My Comm. Expires March 17, 2018

# EXHIBITS

Jim

George Walker - Jim Drnek I-1 Meeting  
Friday, August 10, 2012

1. Evaluation —
2. Student Life Reorganization Plan - see attached documents — *not attached*
3. Faculty Involvement Menu - attached → *(not attached to mine)*
  - a. Available at new faculty training?
  - b. Faculty Mailbag
4. Disability Accommodation for a Student —
  - a. Disability Services has never had funding to cover the expenses associated with disability accommodations. Linda Casalina is very good at negotiating these to keep them affordable. Funds for accommodations have been provided by the Provost's Office. There is a \$2129.00 accommodation needed for a student (see attached).
5. Veterans - Fall Count - Goal = 650 —
  - a. 331 active and 201 inactive = 532 (many more to be processed in Financial Aid Office)
  - b. Recruitment plan (attached)
  - c. Principles of Excellence - CSU adheres; posted on website.
6. Health Service Accreditation →
  - a. Fee Amount: \$7500, December 17 & 18, 2012
7. Res Life Implementation Plan (Attached) →
  - a. CSU Care Team
    - i. Care Team Purpose: To promote student success while maintaining a safe campus environment. The Care Team reviews reports about current and prospective students of concern. Following the review, the Care Team creates an action plan and provides continued care, as needed. Occasionally, the Care Team receives multiple reports regarding a student or a student appears to be at an elevated risk to harm self or others. In these cases, the Care Team takes the actions necessary to protect the well being of the student and other members of the University Community.
    - ii. Team includes: Student Life: Jim Drnek, Willie Banks, Valerie Hinson Hannah; Residence Life: Meg Nicholson; CSUPD: Beverly Pctrey; Counseling Center: Jan Wheaton; Disability Services: Linda Casalina; Admissions: Heike Heinrich; Clare Rahm; Campus Support Services; Monica Plunkett; Center for International Student Services; Office of General Counsel: Kelly King
    - iii. Meeting every Monday at 3pm.
8. Convocation Remarks (Attached)
9. Strategic Planning - Developed mission, vision, values:
  - a. **MISSION STATEMENT:** The mission of Student Affairs is to encourage and empower CSU students to become responsible and productive global citizens and critical thinkers.
  - b. **VISION STATEMENT:** Five years from now Cleveland State University will be home to the premiere division of Student Affairs of urban campuses. We will provide purposeful, student-centered, developmental opportunities, programs and services that are transformative and promote a culture of excellence.
  - c. **VALUES STATEMENT:** The following core values guide Cleveland State University's Division of Student Affairs. We will collaborate actively, work with integrity, respect everyone, empower students, aim to create an enjoyable environment and embrace diversity and inclusion.



**Department of Student Life Reorganization Plan**  
**August 10, 2012**

**Reorganization Rationale:**

Based in part on the findings of a professional student affairs organizational consultant and a recommendation from the Associate Dean of Students who directly supervises leadership of the unit in question, I am recommending a reorganization of Student Life.

The need for assessing the organization of Student Life started to become apparent in July 2010, after the Department of Student Life took responsibility for program management of the new Student Center facility and relocated its offices and activities to the new building. As the Student Center is home to the majority of student events, time and experience was needed in the new building to get a good sense of Student Life organizational and program needs.

The organizational consultant spent two days on-campus interviewing Student Life staff and students, and additional time reviewing a variety of documents including job descriptions, reports, manuals, program evaluations, and Student Life activities. The consultant's final report is included. Given the observations and recommendations provided by the consultant, change is needed in order to move the Department of Student Life forward around concepts of student engagement, leadership, civic engagement, and personal responsibility. The consultant recommends sweeping change within the Department of Student Life. In order to be successful, CSU must consider an organizational structure that will support systemic change needed to move Student Life into the twenty-first century.

The proposed structure provides a context from which to build a shared understanding of leadership, service, and student engagement. This new structure will ultimately provide the flexibility needed for the dynamic nature of Student Life and will provide the intentional focus on student engagement that aligns with the university's mission and purpose. The new structure also presents an opportunity to create a more equitable organizational chart and to capitalize on the assets and strengths of some members of the current Student Life team.

The Center for Student Involvement (CSI) is a unit within the Department of Student Life. The consultant reported that the competency of leadership within the CSI is questionable. The professional staff in CSI (Director of the Center for Student Involvement, Coordinator of Student Organizations, and Coordinator of Greek of Affairs) do not have the skill sets needed to provide adequate oversight and direction to the programs and services housed within the CSI. This inadequate leadership and lack of professional skill is preventing the CSI from meeting baseline expectations, standards, and best practice, much less equipping the area to provide excellent and cutting-edge opportunities for the students of CSU. Greek Life and student organizations have not lived up to their potential and much of that failure can be attributed to the lack of leadership and skill set from staff members in CSI. Reorganization is needed.

**Recommendations:**

These recommendations are a complete departure from the current structure and will require members of the Student Life staff to reframe program delivery and services to students and what student engagement looks like at CSU. With a new organizational structure and new staff members, Student Life and CSU students will embrace this new model and we can position ourselves as a University that truly understands how to effectively make student engagement work at an urban institution in the 21<sup>st</sup> century. Additionally, the new structure will provide an equitable reporting structure and opportunities to utilize current staff member's strengths into a new organizational framework.

**Recommendation 1:** Dissolve CSI. As noted by the consultant, efforts to provide Leadership programs to the CSU student body have not been effective. Service programs should be continued under the auspices of a new organizational structure.

**Recommendation 2:** Develop a new organizational structure. The new structure will allow for the integration of leadership and student engagement across the department at all levels. This new structure would be composed of

three vectors (student organizations, student activities, and student engagement) reporting to the Associate Dean of Students, and one vector, (judicial affairs) reporting to the Dean of Students & Vice Provost for Student Affairs.

#### Reorganization Plan – Vectors within Student Life

##### *Vector 1: Student Organizations*

This vector includes staff associated with student organizations and would oversee the staff and programs affiliated with the roles and functions of student organizations, policies and procedures, budget, and educational programming.

##### *Vector 2: Student Activities*

This vector includes staff associated with student activities and would oversee the staff and programs affiliated with the roles and functions of student activities, campus programming, and campus events.

##### *Vector 3: Student Engagement*

This vector includes staff associated with student engagement and would oversee the staff and programs affiliated with student leadership development (long-term commitment and engagement), civic engagement and community service programs, and fraternity and sorority affairs.

##### *Vector 4: Judicial Affairs*

This vector includes the staff responsible for judicial affairs and would oversee the code of student conduct, along with educational and outreach activities to faculty, staff and students related to student behavior.

*Additional Vectors:* This new structure would allow for the addition of other units geared towards student engagement to fit seamlessly within Student Life (i.e. diversity & inclusion, international programs, etc).

These vectors would be created by re-purposing existing staff positions in a way that would provide equity and stability to the organization chart. Specific reorganization tactics include:

#### Summary of Recommendations and Reorganization:

1. Disband CSI and reorganize Student Life.
2. Create a supervision structure of Assistant Deans that provides more equity and support for each of the four vectors (e.g., most Assistant Deans will supervise a coordinator position and appropriate levels of part-time/graduate assistants).
3. Eliminate the Director of Student Involvement position. Change to a new position: Assistant Dean of Students for Student Engagement
4. Re-classify the Coordinator of Student Activities to: Assistant Dean of Students for Student Activities & Events.
5. Conduct a search for a new Coordinator of Student Activities and a Coordinator of Commuter Student Affairs & Student Center Programs.
6. Re-classify the Manager of the Student Center position to: Assistant Dean of Students for Student Organizations.
7. Re-direct the salary savings from changing the CSI Director Position & Coordinator of Student Organizations positions, along with elimination of the part time Greek Affairs Coordinator to fund the reorganization.
8. Add a Greek Life Graduate Assistant Position to provide specific, dedicated support to Greek Life at 20 hours per week.
9. Reorganization will be funded through salary savings.

**Assistant Dean of Students Title:** Based on a compensation survey by CSU Human Resources (HR) of student affairs administrative structures at other universities, the Assistant Dean title, rather than CSU's traditional title of "Manager" is recommended by HR. The title of Assistant Dean is much more common at this professional level in student affairs and will make CSU a much more desirable choice for student affairs professionals seeking employment.

The Assistant Deans will be responsible and accountable for working collaboratively with each other across their-specific areas of responsibility to develop and execute leadership, engagement, and activities for students. The current structure and job descriptions in Student Life do not support such collaboration. As a result, collaboration that would benefit CSU students does not occur.

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MINIMUMS FOR STUDENT LIFE POSITIONS AFFECTED BY REORGANIZATION – 8-10-12

*Steve Liss* (Director of Student Involvement), Management. Has no right to move into any position. He must apply for any job which interests him, be selected for an interview, and ultimately be selected for the position (see below).

*Bill Russell* (Greek Life Coordinator, Part-time), Member SEIU. Since his position is part-time, he is only eligible for placement into part-time jobs. Student Life will have no part time jobs available. Greek Life responsibilities will be moved into new Assistant Dean for Student Engagement position.

*Mary Myers* (Student Organization Coordinator) Member SEIU. Has the right to move into other positions on campus. The two new positions in Student Life are: (1) Coordinator Student Activities and (2) Coordinator of Commuter Student Affairs & SC Programs. With minimums carefully developed with Human Resources, does not meet minimum qualifications (see below).

*Jamie Johnston* – Promote from Coordinator of Student activities to Assistant Dean of Student Activities.  
*Bob Bergmann* – Student Center Manager, title change to Assistant Dean of Student Organizations.  
*Valerie Hinton Hannah* – Coordinator of Judicial Affairs, title change to Assistant Dean for Judicial Affairs.

ASSISTANT DEAN, STUDENT ACTIVITIES (Jamie Johnston, promote – meets all minimums)  
MINIMUM QUALIFICATIONS: Master's degree in College Student Personnel, College Student Affairs Administration or related field. Six years increasingly responsible administrative and budgetary experience in student affairs. Experience must include three years administrative experience maintaining/developing enterprise online student organization databases, e.g., OrgSync. Significant experience developing, supervising and directing staff and individual program units in programming, event planning and student development. Experience in and proven ability to design and execute a comprehensive student activities and events program. Ability to interpret, develop and execute university policies and procedures. Strong organizational skills; excellent written, oral and intercultural communication skills. Demonstrated ability to work effectively with a diverse university community. Ability to manage multiple projects simultaneously, and work collaboratively to execute programs and services in a team setting. Technologically proficient and experienced in database, word, spreadsheet and presentation applications. Ability to travel with and supervise student groups. Valid driver's license and ability to establish driver eligibility under the University's Driving and Motor Vehicle Policy.

COORDINATOR, STUDENT ACTIVITIES (Search needed)  
MINIMUM QUALIFICATIONS: Master's degree in College Student Personnel, College Student Affairs Administration or related field. Experience in student affairs program planning, event management contract negotiation and budget administration, including experience working with programming boards. Strong student orientation and excellent interpersonal skills, including demonstrated effectiveness advising students. Experience working with multicultural populations and working in diversity programming. Excellent written and verbal communication skills. Current knowledge and experience working with social and digital media. Experience creating, posting and updating social media sites. Proficiency in personal computer software, database management, desktop publishing programs and applications. Ability to work independently and as a team member. Ability to work a flexible schedule. Ability to travel with and supervise student groups. Valid driver's license and ability to establish driver eligibility under the University's Driving and Motor Vehicle Policy.

*Mary Myers* (Coordinator of Student Organizations) – Does not meet majority of minimums:

- Masters degree in College Student Personnel, College Student Affairs Administration or related field.
- Experience working with multicultural populations and working in diversity programming
- Current knowledge and experience working with social and digital media.
- Experience creating, posting and updating social media sites
- Proficiency in personal computer software, database management, desktop publishing programs and applications

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**ASSISTANT DEAN, STUDENT ENGAGEMENT (Search needed)**

**MINIMUM QUALIFICATIONS:** Master's degree in Student Personnel Services or related field. Six years increasingly responsible administrative and budgetary experience in student affairs. Experience must include three years administrative experience maintaining/developing enterprise online student organization databases, e.g., OrgSync. Current and significant knowledge and experience in developing and implementing leadership and service programs with focus on social justice, student leadership and service learning. Ability to design and execute a comprehensive Greek Life program in an urban setting; significant experience and involvement with NPC, IPC, NPHC and Multicultural Greeks. Ability to interpret, develop and execute university policies and procedures. Strong organizational skills; excellent written, oral and intercultural communication skills. Demonstrated ability to work effectively with a diverse university community. Experience developing and supervising staff. Ability to manage multiple projects simultaneously; and work collaboratively to execute programs and services in a team setting. Technologically proficient and experiences with database, word, spreadsheet and presentation applications. Ability to travel with and supervise student groups. Valid driver's license and ability to establish driver eligibility under the University's Driving and Motor Vehicle Policy.

*Steve Liss* (Director of Student Involvement) Does not meet a majority of the minimums:

- Experience must include three years administrative experience maintaining/developing enterprise online student organization databases, e.g., OrgSync.
- significant knowledge and experience in developing and implementing leadership and service programs with focus on social justice, student leadership and service learning.
- Ability to design and execute a comprehensive Greek Life program in an urban setting; significant experience and involvement with NPC, IPC, NPHC and Multicultural Greeks
- Technologically proficient and experiences with database, word, spreadsheet and presentation applications.
- Ability to travel with and supervise student groups.

**ASSISTANT DEAN, STUDENT ORGANIZATIONS (Bob Bergman, title change, meets minimums)**

**MINIMUM QUALIFICATIONS:** Master's degree in Student Personnel Services or related field. Six years increasingly responsible administrative and budgetary experience in student affairs. Experience must include three years administrative experience maintaining/developing enterprise online student organization databases, e.g., OrgSync. Ability to interpret, develop and execute university policies and procedures. Significant experience developing and supervising staff and individual program units. Knowledge of best practices and programming experience in commuter student, student media and student organization areas. Excellent written and oral communication skills. Technologically proficient in database, word processing, spreadsheet and presentation software. Ability to manage multiple projects simultaneously; and work collaboratively to execute programs and services in a team setting. Ability to work effectively with a wide range of constituencies in a diverse community.

**COORDINATOR, COMMUTER STUDENTS AFFAIRS & SC PROGRAMS (Search needed)**

**MINIMUM QUALIFICATIONS:** Master's degree in College Student Personnel, College Student Affairs Administration or related field. Two years professional experience in higher education commuter affairs programming. Experience in student activities, and student organization advising. Proven background in qualitative and quantitative research on higher education commuter students. Strong organizational skills, excellent written, oral and intercultural communication skills and the ability to work effectively at all levels of a diverse university community. Proficiency utilizing enterprise online student organization databases, e.g. OrgSync. Demonstrated proficiency in word processing, database, spreadsheet and presentation software. Current knowledge and experience working with social and digital media. Demonstrated experience developing and delivering curriculum geared to student leaders, advisors and the university community in multiple formats (in person and web-based). Ability to work collaboratively to execute programs and services in a team setting.

*Mary Myers* (Coordinator of Student Organizations) - Does not meet a majority of the minimums:

- Masters degree in College Student Personnel, College Student Affairs Administration or related field.

- Two years professional experience in higher education commuter affairs programming.
- Proven background in qualitative and quantitative research on higher education commuter students
- Proficiency utilizing enterprise online student organization databases, e.g. OrgSync
- Demonstrated proficiency in word processing, database, spreadsheet and presentation software
- Demonstrated proficiency in word processing, database, spreadsheet and presentation software
- Current knowledge and experience working with social and digital media
- Demonstrated experience developing and delivering curriculum geared to student leaders, advisors and the university community in multiple formats (in person and web-based)

*Digital  
media*



**Cleveland State University**  
*Department of Student Life*

This Agreement, with attachments as applicable, is dated **April 20, 2012** and is by and between Cleveland State University (CSU), a state-supported university and instrumentality of the State of Ohio established under Ohio law acting by and through its Board of Trustees with a principal business address at 2121 Euclid Avenue, Cleveland, Ohio 44115 ("CSU") and

**CONSULTANT: Thomas Watson Cauthen, III, Ph.D.**

CSU and the Consultant (both or either of which may hereinafter be referred to respectively as the ("Parties" or a "Party")) agree as follows: The Consultant agrees to the Engagement, as described below, in consideration of CSU's obligation to pay the Consultant the total amount of:

**AMOUNT: \$3,000.00 (inclusive of travel, meals and lodging)** and to provide a licensed site for the Engagement. Payment, by University check, will be made upon receipt of this signed Agreement and completion of the performance. Payment is subject to withholding taxes as described in this Agreement.

**SPECIFICS OF THE ENGAGEMENT**

1. Date: May 29 & 30, 2012
2. Location: CSU - Department of Student Life  
2121 Euclid Avenue  
Student Center 319  
Cleveland, Ohio 44115  
(216)687-2048 fax- (216) 687-5441

3. Other Terms and Conditions:

**CSU Agrees to Provide:**

The Associate Dean will provide as much preliminary information prior to the consultant's visit to include, but not limited to: budgets, program descriptions, organizational charts, position descriptions, promotional brochures, and annual reports.

**Consultant Agrees to Provide:**

The leadership consultant would be be charged with spending 2 days on campus, interviewing staff members and students, and conducting a needs assessment of the Center for Leadership & Service, and Center for Student Involvement.

A final report would be submitted to the Associate Dean, which addressed the following questions:

1. Based on our current leadership model/theory, how can Student Life best structure our programs to integrate theory into practice? More specifically, how should leadership programs intersect with the



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work of the Center for Student Involvement (student organizations, Viking Expeditions, and Greek Life)?

- a. Recommendations for restructuring and staffing
    - i. Center for Student Involvement
    - ii. Center for Leadership & Service
  - b. Program recommendations
    - i. Student organizations
    - ii. Greek life
    - iii. Programming Board
    - iv. General fee/GFAC groups
    - v. Training programs
    - vi. Org Sync
2. What are other select Urban 13 institutions offering in terms of leadership & service and student involvement for their students? (see attachment for Urban 13 institutions)

A final report would be submitted to the Associate Dean, which addressed the questions listed above, as well as recommendations for DSL to implement. Additionally, the report would include benchmarking information on Leadership & Service offices at selected Urban 13 institutions, and emerging trends in the field of leadership and service. Report will be submitted no later than 2 weeks after visit.

4. CSU contact information

Name: Willie L. Banks, Jr., Ph.D.

Title: Associate Dean of Students

Address: 2121 Euclid Ave.

Building: SC 319

City, State & Zip: Cleveland, OH 44115

Email: w.l.banks@csuohio.edu

Phone: 216-687-3966

13. Consultant's Contact Information

Name: Thomas Watson Cauthen, III, Ph.D.

Address: 412 Creek Hollow Way Athens, GA 30601

Email: twcauthen@gmail.com

Phone: 404-444-567

Fax:

14. Payment processing and W-9 withholding information required for Consultant:

Social Security Number: 257-59-0993

Date of Birth: 06-17-1980

15. CSU check to be Made Payable To (Name): Thomas Watson Cauthen, III

**CANCELLATION:**

If the Engagement is canceled due to construction, partial or total destruction, acts of God, severe inclement weather, war, terrorism, outbreaks of disease, epidemics, government regulation, disaster, fire, strikes, civil disorder, unavailability of water, electricity or other necessary utilities, or any other similar cause beyond the control of the Parties which would make it inadvisable, illegal, or impossible to perform under the terms and conditions of this contract, then this Agreement will terminate and neither Party shall have any further rights nor liabilities hereunder.

**CHOICE OF LAW:**

This Agreement shall be governed by the laws of the State of Ohio and any action or proceeding relating in any way to this Agreement or the subject matter hereof shall be brought and enforced exclusively in the competent courts of Ohio.

**COMPLIANCE WITH LAW:**

Consultant agrees to comply with all applicable federal, state, and local laws, ordinances and regulations and all applicable CSU rules, regulations, policies, procedures and guidelines.

**INDEMNIFICATION AND INSURANCE:**

A. Consultant agrees to indemnify and hold CSU harmless from any and all losses and expenses whatsoever which may be obtained against, imposed upon, or suffered by CSU because:

- 1. the Engagement infringes or violates or is claimed to infringe or violate any copyright or trademark, common or stationary law, or any literary, dramatic, or other right;
- 2. the Engagement violates or is claimed to violate any person's right of privacy;
- 3. the Engagement contains or is claimed to contain any libel, slander, or plagiarism;
- 4. any claim is made against CSU or damage is caused to CSU's property as a result of the Engagement.

B. If requested by CSU, Consultant will provide evidence of Commercial General Liability insurance, including Coverage B Personal and Advertising Injury Liability, without a deductible, in limits of not less than One Million Dollars (\$1,000,000.00) per occurrence. Such insurance will name as insured the Consultant and CSU and cover both Consultant and CSU from all liability occurring as a result of the Engagement.

C. CSU reserves the right to require limits above the minimum when, in the sole discretion of CSU, such higher limits are justified.

Consult with the Dean of Students to determine if proof of insurance is required for this specific event.

Proof of insurance requested?  Yes  No CSU Initials UPB  
 Additional insurance limit Requested?  Yes  No CSU Initials UPB

D. CSU is not responsible for, and has no liability to the Consultant, contractors, guests, participants, attendees or spectators for any loss, theft, damage, personal injury, delay, annoyance, inability to hold the event as planned or other casualty, and Consultant hereby waives any claim against CSU for any such liability, except to the extent that such liability, loss or damage is determined to be due to the negligent acts or negligent omissions of CSU, its agents, employees, contractors, or subcontractors while acting within the scope of their employment, as set forth in Ohio Revised Code 2743.02. Nothing in this provision shall be constructed or interpreted as a waiver of the sovereign immunity of CSU and/or the State of Ohio beyond the waiver provided in Ohio Revised Code 2743.02.

**NON-RESIDENT ALIENS PROVIDING INDEPENDENT PERSONAL SERVICES:**

As required by Internal Revenue Service regulations, any non-resident alien receiving compensation for independent personal services through CSU's Accounts Payable will be subject to withholding at the statutory rate of thirty percent (30%) unless the following requirements are met and the following forms completed:

- A. The non-resident alien must be qualified to apply for and must apply for a social security number;

- B. The non-resident alien must be a resident of a country which has a tax treaty with the United States which exempts independent personal services from United States income tax; and  
C. The Consultant must submit IRS Form B233 - Exemption from withholding on compensation for Independent Personal Services of a non-resident alien individual and enter her/his social security number or the words "applied for" in the appropriate section of this form.

**RELATIONSHIP BETWEEN CONSULTANT AND CSU:**

Consultant is an independent contractor and is not to be considered or deemed an employee of CSU for any purpose whatsoever, including but not limited to Social Security withholding, Unemployment Compensation, Workers' Compensation or any employment-based benefits.

**TRAVEL EXPENSES:**

Fee for Consultant is inclusive of travel, meals and lodging and is the sole responsibility of Consultant.

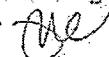
**OTHER PROVISIONS:**

- A. This Agreement is not binding upon CSU until signed by both CSU and the Consultant.  
B. The Person Signing this Agreement on behalf of Consultant certifies that he/she signs as a properly authorized representative of the Consultant.  
C. Any modifications to this Agreement must be made by written attachment signed by CSU's Department of Student Life and the Consultant and attached hereto. In the event an attachment contains any terms that are inconsistent with the terms and conditions of this Agreement, the terms and conditions of this Agreement shall control.  
D. The terms of this Agreement are severable such that if one or more provisions are declared illegal, void, or unenforceable, the remainder of the provisions shall continue to be valid and enforceable.  
E. The waiver by CSU of any provision of this Agreement on any occasion and upon any particular circumstances shall not operate as a waiver of such provision on any other occasion or upon any other circumstances.  
F. The headings used in this Agreement are not a part of this Agreement and shall have no effect upon the construction or interpretation of any part thereof.

**COMPLETE AGREEMENT:**

This Agreement and any attachments hereto contain the entire understanding between the Parties relating to the subject matter hereof, and none of the provisions of the Agreement may be altered, modified, or amended in any way except by an instrument in writing, signed by the Parties and attached hereto.

This Agreement is not valid unless signed by the Consultant and received by CSU by this date:

~~5/1/2012~~ 5/14/2012 

Department of Student Life  
Leadership Consultant Report



Submitted by:  
T.W. Cauthen III, Ph.D.  
June 15, 2012



Introduction/Statement of the Problem

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Due to budget constraints, the Coordinator of Service and Leadership position has not been filled since 2007. Since that time, the previous Associate Dean of Students assumed responsibilities for Service and Leadership and upon her departure in 2011; the responsibilities were divided to various members of the Student Life team.

By all accounts, the service components (Viking Expeditions Make a Difference day, and Do-Gooder day) have continued to thrive. The GA associated with this program has done a good job of continuing the work and engaging students in service opportunities.

Unfortunately, the leadership side has struggled to maintain focus and purpose. In my opinion, the team approach to leadership did not work and caused more confusion and frustration for all parties involved. Additionally, the software we are currently using to conduct assessments of students is outdated and may not be the best way to conduct leadership assessments. I also believe that our current approach to leadership is not relevant with CSU's student body (leadership certification) and misses the mark in connecting the dots of service and leadership.

At the present time, activities connected to the Leadership component of the office have been suspended due to low participation numbers from students, the lack of time from current staff members to fully devote time and energy to leadership programs, and the lack of resources needed for a successful leadership program, including personnel and operating expenses.

The activities that are not currently being offered include:

- iLead student leadership conference
- Leadership Assessments
- Leadership Development Plans
- Leadership Certification

## Scope of Work

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Based on conversations with current staff members who were charged with implementing Leadership programs on campus, a number of questions and issues have arisen that require a leadership consultant to address. This visit will help define the role of leadership within the context of CSU and Student Life.

The leadership consultant will be tasked with answering the following questions:

1. Based on our current leadership model/theory, how can Student Life best structure our programs to integrate theory into practice? More specifically, how should leadership programs intersect with the work of the Center for Student Involvement (student organizations, Viking Expeditions, and Greek Life)?
  - a. Recommendations for restructuring and staffing
    - i. Center for Student Involvement
    - ii. Center for Leadership & Service
  - b. Program recommendations
    - i. Student organizations
    - ii. Greek life
    - iii. Programming Board
    - iv. General fee/GFAC groups
    - v. Training programs
    - vi. Org Sync
2. What are other select Urban 13 institutions offering in terms of leadership & service and student involvement for their students?

## Process/Methods

The consultant engaged in a series of semi-structured qualitative interviews over the course of two days in order to learn more about the current state of affairs at CSU. Additionally, prior to campus engagement, the consultant conducted a document analysis of materials presented by the host institution in order to learn more about the current climate and base-line programmatic offerings.

The following documents were analyzed:

1. Division of Student Affairs Organizational Chart
2. Center for Student Involvement Organizational Chart
3. Center for Student Involvement Job Descriptions
4. 2008-2009 Annual Report
5. 2009-2010 Annual Report for the Center for Student Involvement
6. Student organizations comparisons with Urban 13+ institutions
7. SOP Manual for the Center for Leadership & Service
8. CSU's Leadership Certification Program Report
9. CSU Peer Institutions, Past & Present

The schedule of interviews were as follows:

Time	May 29, 2012	May 30, 2012
9am	Jim Drnek- Dean of Students	Bill Russell, Coordinator, Greek Life
10am	Dan Lenhart- Student Media (CSI)	Bob Bergman- Manager, Student Center
11am	Jillian Keller- Coor. Women's Center	Jim Drnek, Dean of Students – Early lunch and initial wrapup
Noon	Lunch- WB	
1pm	Steve Liss- Director, Center for Student Involvement (CSI)	Mary Myers- Conference Call
2pm	Lisa Fellows, GA for Service	Jamie Johnston, Coordinator, Student Activities
3pm	Casey Hagan, GA for Leadership	Wrap up with WB
4pm		Head to Airport
5pm	Andrea Bruno, GA for CSI	

## Findings

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The following findings are presented after reviewing departmental annual reports, organizational charts, position descriptions, benchmarking studies, and extensive interviews with departmental staff. The following recommendations are situated within the following contextual considerations:

- The members of the CSU team are best equipped to consider the following observations, recommendations, and tactics given the culture of CSU and its student body. The consultant's visit included no conversations with students; as such, it is important to consider the student needs and culture when making decisions based on these findings.
- Decisions regarding this scope of work cannot be made in a vacuum and without consideration for other university and division decisions that may influence and/or affect the Department of Student Life. These recommendations are provided with consideration of the broadest scope and context in order to share insights that reflect a dynamic organization while minimizing the potential that additional changes might be needed in order to accommodate those external influences. It should be noted that the consultant had no knowledge of external influences that may affect the recommendations prior to submitting this report.

## Observations

After a review of the offerings at CSU, the following observations are clear:

- Distributing the responsibilities of leadership and service programs among members of the Student Life team is not effective. Programs have suffered because Student Life staff members have not been able to maintain the quality of programs given their other full-time responsibilities. Tasks associated with the leadership and service programs inevitably fell to the responsibility of graduate students who may or may not have had the most appropriate level of expertise necessary to develop and implement quality programs.
- There exists an opportunity to create a more broad-based, shared philosophy, understanding, and definition of leadership throughout the Department of Student Life. In particular, the areas currently reporting to the Associate Dean of Students should lead the charge in establishing this shared philosophy and consider how it may be infused into their daily work with students through programs, initiatives, and services.
- Service is a powerful vehicle through which to teach leadership. The service initiatives seem to be widely popular and engage students in meaningful experiences. These programs (e.g., Viking Expedition, Make a Difference Day, Do-Gooder Day) are providing an entry point for student engagement and should be continued. However, staff should consider intentional ways in which these experiences are meeting learning

outcomes related to leadership and civic engagement through pre- and post-service reflection activities.

- There is a clear divide of communication and programming efforts between the Center for Student Involvement and other areas within the Department of Student Life. The culture is characterized by a lack of collaboration, communication, collegiality, and shared vision.
- The competency of leadership within the Center for Student Involvement is questionable. The professional staff in this area (Director of the Center for Student Involvement, Coordinator of Student Organizations, and Coordinator of Greek Life) do not have the skill set needed to provide adequate oversight and direction to the programs and services housed within the Center. This inadequate leadership and professional skill is preventing the CSI from meeting baseline expectations, standards, and best practice, much less equipping the area to provide excellent and cutting-edge opportunities for the students of CSU.

### **Recommendations**

Based on the stated observations, the following are recommendations for consideration:

- *Leadership Programming*
  - Discontinue leadership programs as they currently exist.
  - Consider how leadership is infused throughout areas within Student Life, and in particular, areas affiliated with student involvement, student activities and events, fraternity and sorority life, and student organizations. Develop a conceptual framework that honors this infusion and identifies disciplines of thought (i.e., leadership, civic engagement, social justice, identity development, change models, learning theory) that reflect the mission, vision, and values of the Division of Student Life. This conceptual framework should drive sequential curriculum/program development and teaching methods that are tied to learning outcomes.
  - Conduct a needs assessment and/or focus groups to understand more fully the needs of CSU students as it relates to leadership development. Discussions with staff would indicate that students are more interested in the “nuts and bolts” of leadership and in developing a toolbox of leadership skills. This skill-based leadership development would indicate less connection with the theoretical approach of leadership development. Conducting focus groups/needs assessment will produce accurate, assessment data driven decisions regarding the most effective development of leadership programs that are meeting the needs of CSU students. This, however, does not mean that the way in which leadership is conceptualized and taught is not driven by a theoretical

framework. Instead, it informs the teaching methods and experiential opportunities through which students achieve those learning and development outcomes.

- *Service Programming*
  - The service experiences offered seem to be working effectively. Continue these kinds of experiences; students are interested in participating in and connect with these experiences. They serve as a conduit for building student involvement capacity.
  - Service experiences are a powerful way to teach leadership. Consider how these experiences are intentional and utilize them to teach leadership concepts to the students who are involved.
  - Deepen the learning associated with these civic engagement experiences by developing pre- and post-trip learning activities and reflection. You may also consider programming and educational experiences around the social issues and community needs that the service directly addressés.
- *Student Organizations*
  - Fully implement OrgSync as a student organization management and communication tool. The implementation of this software solution should have happened months ago. The fact that the software still has not been fully implemented, even after a year and a half of acquiring the license, speaks to the lack of leadership provided from CSI staff. Implementing this technology should assist with streamlining processes that are quite inefficient and take up entirely too much staff time presently.
  - Modify the way in which student organization accounts are managed. The coordinator for student organizations should not be managing student accounts. This task should be centralized or managed by a business professional/accountant. At the very least, processes associated with student organization account management (e.g., account balance/status report inquiry) should be examined and changed to create more efficient use of time regarding business practice (e.g., printing status reports for each student organization every month and placing them in student organization mailboxes as opposed to meeting with students to provide an account balance/status update, or utilizing OrgSync to provide this financial information in a real-time, up-to-date fashion).
  - Review and update, on a regular basis, student organization policies and procedures. Ensure, through educational programming, that student organizations are aware of and knowledgeable about processes, policies, and procedures that are expected of students and student organizations.
  - Provide educational programming that benefits student organizations. Currently, educational programming does not exist

for student organizations. This is an untapped opportunity to provide leadership learning experiences for student organizations and their leaders (e.g., how to run a meeting, membership recruitment, budget management, event planning, etc.).

- Advance programmatic offerings and student organization support through the use of technology. In addition to the full implementation of OrgSync, consider how technology solutions such as webinars or podcasts might be an effective way to deliver student organization training and education, while also addressing issues of accessibility.
- *Greek Life*
  - Develop, implement, and promulgate policies and procedures associated with risk management and chapter management throughout the fraternity and sorority community. These procedures should be based on the current practices of national organizations such as NIC, NPC, NPHC, and multicultural governing bodies (i.e., NALFO, etc.).
  - Establish higher levels of recognition and oversight by the university for fraternities and sororities. This should be above and beyond the process for student organization registration. The university should establish criteria it will use to determine whether or not social Greek letter organizations are recognized. Revisit and revise the established relationship agreement. Established criteria, expectations, rights, privileges, and responsibilities should be reflected in the agreement. The agreement should be revisited and revised (if necessary) on an annual basis.
  - Examine the adopted philosophy of support for local social Greek letter chapters. Review the history, oversight, and level of support for local chapters. If these criteria are lacking, consider pushing, with earnest, their affiliation with a national organization. Hold organizations with appropriate history, oversight, and support to continue as local chapters to the same standards created for organizations affiliated with national groups. Create protocol for working with new local organizations that form so that they may be tracked to affiliate with national organizations. CSU may also benefit from creating a philosophy and standard for expansion within the sorority/fraternity community.
  - Greek alumni, while an important aspect of fraternity and sorority life, should not be the main focus of the person in the role of supporting Greek Life. Maintaining the relationship with Greek alumni should be important, but could be managed through stronger collaborations with the Alumni Association.
  - Greek Life at CSU deserves a more intentional review than this visit provides. There seems to be an unrealistic self-appraisal of the community when interviewing staff responsible for this area. This

raises great concern, particularly as it relates to university exposure to risk. The first step to addressing this is to hire someone with the appropriate credentials to support this aspect of student life. This person should have at minimum a master's degree in student affair administration or related field and experience with fraternity and sorority affairs. The person in this role should be well versed in student development theory and on current trends, standards, and best practices in fraternity and sorority communities on college campuses.

- *Student Activities/Programming*
  - Establishing CAB as the programming body for campus reduces overlap and establishes clear roles and responsibilities. This decision is a smart one and should be maintained.
  - Continue the use of an expanded committee structure that supports higher levels of student involvement in campus programming.
  - The campus should be commended for the high level of innovative programming taking place. Continuing this creative programming will only increase the number of students engaging in campus life.
  - Programming efforts only stand to expand and serve more students through the combined efforts and budget consolidation of CAB and the student center programs. This decision provides greater opportunity for relevant and innovative student programs. Continue moving forward with this decision.

### **Tactic**

Given the observations and recommendations provided above, the following tactic may serve as a catalyst for the change needed in order to move the Department of Student Life forward around concepts of student engagement, leadership, and civic engagement.

The recommendations above might suggest a sweeping change within a major area of the Department of Student Life. In order to achieve this goal, you should consider the organizational structure that might support the kind of systemic change you wish you create.

The proposed structure provides a context from which to build a shared understanding of leadership, service, and student engagement. It will ultimately provide the flexibility needed for the dynamic nature of student life and will provide the intentional focus on student engagement that aligns with the university's mission and purpose. It also presents an opportunity to create a more equitable organizational chart and to capitalize on the assets and strengths of a few members of the current team.

The new organization focuses on an overarching goal of student engagement and an ability to create a shared focus and learning orientation regarding student leadership development. The Associate Dean should provide leadership for an all-encompassing student engagement portfolio. This portfolio should include three vectors of student engagement based on the current reporting structure of the associate dean. Should further restructuring take place, this organizational model provides for a dynamic structure that would support additional areas under the framework of student engagement.

Vector 1: Student Organizations

Vector 2: Student Activities

Vector 3: Student Engagement

*Vector 1: Student Organizations*

This vector would house staff associated with student organizations and would oversee the staff and programs affiliated with the roles and functions of student organizations, policies and procedures, budget, and educational programming.

*Vector 2: Student Activities*

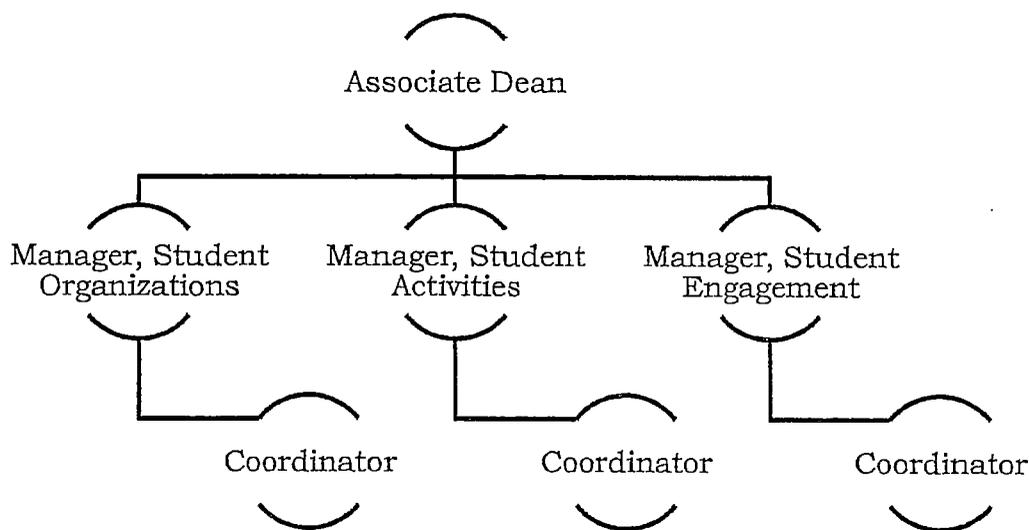
This vector would house staff associated with student activities and would oversee the staff and programs affiliated with the roles and functions of student activities, campus programming, and campus events.

*Vector 3: Student Engagement*

This vector would house staff associated with student engagement and would oversee the staff and programs affiliated with the roles and functions of events and programs that are affiliated with student leadership development (long-term commitment and engagement), civic engagement and community service programs, and fraternity and sorority affairs.

These vectors should be created by re-purposing existing positions in a way that might provide equity and stability to the organization chart. Consider these tactics:

- Re-classify the Director of Student Involvement to a manager position.
- Re-classify the Coordinator of Student Activities to a manager position.
- Re-purpose the Manager of the Student Center position to one that aligns more closely with the roles and functions desired by the Department of Student Life.
- Re-direct the salary savings from the reclassification of the director position to transition the part-time Greek Life Coordinator position to a full-time coordinator position.
- Create a supervision structure that provides more equity and support for each of the three vectors (e.g., each of the managers supervise a coordinator position and appropriate levels of part-time/graduate assistant employees).



### Benchmarking

The following links represent the best of the Urban 13 regarding student involvement, leadership development, civic engagement, student activities and organizations, and fraternity and sorority life. Each provides insight into organizational structure, programmatic offerings, and staff support.

#### **University of Houston**

- Center for Student Involvement
  - Provides support for general student organizations and fee-funded groups.
- Center for Fraternity and Sorority Life
  - Provides support for social Greek letter organizations
  - Oversees leadership development and community engagement programs.
  - The leadership development framework and stated outcomes is strong and would serve as a great resource.

### **Temple University**

- Division of Student Affairs
  - Student Activities, Student Leadership, and Student Media are individual units within the Division of Student Affairs at Temple.
- Office of Leadership Development
  - Provides a great framework for leadership development/leader certification program – Diamond Leaders & Student Leadership Challenge

### **Indiana University Purdue University, Indianapolis**

- Office of Student Involvement
  - IUPUI utilizes an Office of Student Involvement to support leadership programs, civic engagement, fraternity and sorority life, student activities, and student organizations.

### **University of Memphis**

- Student Leadership and Involvement
  - University of Memphis utilizes Student Leadership and Involvement to support leadership development, student organizations, student activities, Greek life, and service programs.



Consultant scope of work  
Willie L Banks to: James M Drnek

04/20/2012 01:40 PM

History: This message has been replied to .

Jim,  
Per your request, I am attaching the leadership consultant scope of work document.  
Let me know if you need anything else.  
WB



leadership  
consultant  
1.docx

Dr. Willie L. Banks, Jr.  
Associate Dean of Students  
Student Life  
Cleveland State University  
2121 Euclid Avenue, SC 319  
Cleveland, OH 44115-2214  
216-687-2048  
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CSU\_000492

**Center for Leadership & Service and  
Center for Student Involvement  
Proposal for Leadership Consultant/Scope of Work  
Cleveland State University  
Spring, 2012**

**Background information:**

The mission of the Center for Leadership and Service is "to engage and educate students around the core areas of self-knowledge, leadership theory and practice, service-learning, values clarification, diversity, and civic engagement while being inclusive and accessible to all students."

The Grounding Theory of the center is based on Robert Greenleaf term "servant leader," which begins with the natural call to service and ultimately to aspire toward leadership. In 1995 student affairs professionals developed the Social Change Model of Leadership Development as a guide to enhance the development of leadership qualities in all students. This model promotes the values of equity, social justice, self-knowledge, personal empowerment, collaboration, citizenship, and service. More recently, reciprocal concepts such as the Relational Leadership Model put forth by Komives, McMahon, & Lucas (1999) posit that leadership "is a relational process of people together attempting to accomplish change or make a difference to benefit the common good." The models of transforming leadership (Burns, 1978) and Followership (Kelley, 1988) also contribute to the overall program.

The Center list the following benefits to students who participate in Leadership & Service activities offered through the center:

- Develop career-oriented skills
- Benefit the community through service projects
- Broaden your awareness of social issues
- Build your academic and involvement portfolio
- Develop the practice of good citizenship
- Reflect on experiences for personal growth
- Build understanding and respect for other perspectives

**Statement of Problem:**

Due to budget constraints, the Manager of Service and Leadership position has not been filled since 2007. Since that time, the previous Associate Dean of Students assumed responsibilities for Service and Leadership and upon her departure in 2011; the responsibilities were divided to various members of the Student Life team.

By all accounts, the service components (Viking Expeditions Make a Difference day, and Do-Gooder day) have continued to thrive. The GA associated with this program has done a good job of continuing the work and engaging students in service opportunities.

Unfortunately, the leadership side has struggled to maintain focus and purpose. In my opinion, the team approach to leadership did not work and caused more confusion and frustration for all parties involved. Additionally, the software we are currently using to conduct assessments of students is outdated and may not be the best way to conduct leadership assessments. I also believe that our current approach to leadership is not relevant with CSU's student body (leadership certification) and misses the mark in connecting the dots of service and leadership.

At this present time, I have suspended activities connected to the Leadership component of the office, due to low participation numbers from students, the lack of time from current staff members to fully devote time and energy to leadership programs and the lack of resources needed for a successful leadership program, including personnel and operating expenses.

The activities that are not currently being offered include:

- Lead student leadership conference
- Leadership Assessments
- Leadership Development Plans
- Leadership Certification

**Proposal:**

Based on conversations with current staff members who were charged with implementing Leadership programs on campus, a number of questions and issues have arisen which I believe need a leadership consultant to address. In my opinion, our leadership program is out dated, does not meet current best practices for other similar institutions, lacks focus and direction, and needs an outside perspective. This visit will help define the role of leadership within the context of CSU and Student Life.

The leadership consultant will be tasked with answering the following questions:

1. Based on our current leadership model/theory, how can Student Life best structure our programs to integrate theory into practice? More specifically, how should leadership programs intersect with the work of the Center for Student Involvement (student organizations, Viking Expeditions, and Greek Life)?
  - a. Recommendations for restructuring and staffing
    - i. Center for Student Involvement
    - ii. Center for Leadership & Service
  - b. Program recommendations
    - i. Student organizations
    - ii. Greek life
    - iii. Programming Board
    - iv. General fee/GFAC groups
    - v. Training programs
    - vi. Org Sync

2. What are other select Urban 13 institutions offering in terms of leadership & service and student involvement for their students? (see attachment for Urban 13 institutions)

A paid leadership consultant would be offered a stipend of \$3,000 (inclusive of travel, food, and lodging) and be charged with spending 2 days on campus, interviewing staff members and students, and conducting a needs assessment of the unit.

A final report would be submitted to the Associate Dean, which addressed the questions listed above, as well as recommendations for DSL to implement. Additionally, the report would include benchmarking information on Leadership & Service offices at selected Urban 13 institutions, and emerging trends in the field of leadership and service.

Ideally, this visit would take place during the last 2 weeks of May and the beginning of June and the report due to the Associate Dean of Students 2 weeks after the campus visit. The Associate Dean will provide as much preliminary information prior to the consultant's visit to include, but not limited to: budgets, program descriptions, organizational charts, position descriptions, promotional brochures, and annual reports.

The Urban 13 is a research-sharing association between thirteen public urban universities in major metropolitan areas of the U.S. These are:

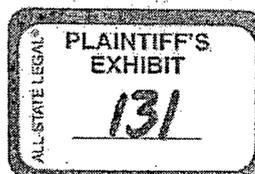
- University of Alabama at Birmingham
- University of Missouri-St. Louis
- University of Cincinnati
- University of Missouri-Kansas City
- Cleveland State University
- University of New Orleans
- Florida Agricultural & Mechanical University
- City College of New York
- Georgia State University\*
- University of Pittsburgh
- University of Houston\*
- Portland State University
- University of Illinois at Chicago\*
- Temple University\*
- Indiana University Purdue University, Indianapolis\*
- University of Toledo
- University of Massachusetts Boston
- Virginia Commonwealth University
- University of Memphis\*
- Wayne State University
- University of Wisconsin-Milwaukee

Interviews with:

- Dean of Students – Dr. Jim Drnek
- Associate Dean of Students – Dr. Willie Banks
- Center for Student Involvement (Student Organizations/Greek Life) - Steve Liss, Dr. Mary Myers, Bill Russell
- Student Activities & ILead - Bob Bergman
- Student Activities & Do Gooder/Make a Difference Day - Jamie Johnston
- Service & Leadership GA's - Lisa Fellows & Casey Hagan
- Student Organization GA – Andrea Bruno
- Women's Center & Leadership Certification- Jillian Keller
- Students who have participated in Service & Leadership Activities

## View Professional Staff Annual or Probationary Performance Evaluation Summary - Dir, Student Involvement

Evaluation Details			
Employee First Name:	Steven		
Employee Last Name:	Liss		
Employee ID Number:	1002241		
Employee Account Name:	Liss, Steven		
Business Title:	Dir, Student Involvement		
Job Code Title:	Director (Admin Prog)-7		
Evaluation Cycle:	Fiscal		
Evaluation Cycle Begin Date:	07/01/2009		
Evaluation Cycle End Date:	06/30/2010		
Department:	Student Life		
Supervisor:	Emerick, Sandra		
Supervisor Title:	Assoc Dean, Student Life / Dean of Students		
Next Level Supervisor:	Drnek, James		
Other Users in Department Who Need Access to this Evaluation:	Emerick, Sandra Graser, Misty Drnek, James		
Last Year's Goal Statements			
8 Records			
Goal:	Goal Met: (Entered by Supervisor)	Employee Comments:	Supervisor Comments:
Assessment -- focus on quality of student experience rather than quantity.	Yes	Unit assessment revised in association with overall departmental changes.	Steve was extremely instrumental in gathering data for the Assessment process. Our goal is to continue to ramp up data collection, analysis and closing the assessment loop.



CSU\_004551

Job Responsibilities		11 Records		Responsibility		
Completed Fall Semester	Goal met and thoroughly managed by Steve	Yes	2009	1. Provides oversight and direction for effective operation of general fee and registered student organizations and student media by: A. Overseeing the Center for Student Involvement, including registered organization resources and general fee work space. B. Establishing goals and overall direction for staff charged with coordinating operations of registered student organizations, fraternity/sorority affairs, and student media. Serving as advisor for budget processes, personnel matters and administrative functions. C. Ensuring that general fee organizations are operationally consistent with department audit requirements and all student organization policies and procedures. D. Developing procedures for general fee student officer training, orientation, performance evaluation and transitioning. Hosting general fee advisor meetings to discuss issues/concerns and promote consistency of operations. E. Implementing annual process for review and revision of general fee organization constitutions, organizational structures, officer selection, position descriptions, funding strategies and adherence to record retention policies.		
Board of Electors established as stand-alone entity.	Completed Fall Semester	Yes	2009	Goal met and thoroughly managed by Steve		
Data collection and associated report production process refined.	In progress -- introduction of OrgSync technology development and implementation. Continue to find ways to assist in this process.	No				
Explore CSI staffing alternatives; e.g. addition of full G.A. and non-work study student staff.	Full G.A. added for FY 11. Pursuing non-work study student staff via CFAC in Fall 2010.	Yes				
SGA Election process upgraded through use of technology.	SGA Election hosted online for first time in April 2010.	Yes				
Streamline student organization administration process.	In progress, introduction of OrgSync will assist with this process.	No				
Support and/or facilitate creative efforts to market on-campus involvement opportunities to CSU students.	CSU brochure not complete	No				
Support development of Greek Life strategic plan	Ongoing. Helped facilitate series of meetings with Dean, Greek Life Coordinator and Greek Alumni towards this end.	No				

- F. Implementing assessment plan for supervised areas in conjunction with requirements and guidelines of CSU and Council for the Advancement of Standards in Higher Education.
- G. Advising at least one general fee student organization by training/evaluating student officers, supporting the officer selection process, ensuring budget operations are consistent with department and university procedures and ensuring that all organizational initiatives contribute to an effective learning environment supportive of student involvement and retention.
- 2. Supports Faculty Senate Student Life Committee by serving as member of sub-committees (e.g. student conduct code, student organization policies, student leader scholarship policy). Makes recommendations regarding policy revision.
- 3. Coordinates activities of the General Fee Advisory Committee (GFAC) by:
  - A. Establishing GFAC agenda in collaboration with the Vice Provost.
  - B. Overseeing and ensuring compliance with fund request/allocation procedures.
  - C. Maintaining records, meeting minutes/summaries and content of GFAC web site. Coordinating and tracking work flow, schedules, projects and committee decisions.
  - D. Serving as primary point of direct administrative contact and liaison with committee members, faculty, staff and student campus constituencies.
  - E. Convening and chairing GFAC subcommittees and ad hoc task forces. Serving as chairperson of GFAC in absence of the Vice President.
- 4. Advises and provides operational oversight for the Student Government Association (SGA), including:
  - A. Advising and supporting SGA operations, including Executive Board, Senators, Student Appointments Board, Finance Committee, United Student Organizations, Print Shop, and other SGA committees.
  - B. Monitoring SGA budgets, ensuring financial recordkeeping follows established guidelines and department audit requirements.
  - C. Conducting monthly meetings with officers and once per semester performance appraisals with officers, attending cabinet, executive board and senate meetings.
  - D. Reviewing and monitoring documents to be presented before the student body.
- 5. Supervises assigned personnel by providing orientation, guidance, assistance and developmental training as required. Approves or makes recommendations regarding employment, performance appraisals, salary changes, promotions, transfers, and terminations.
- 6. Coordinates facility management and office space allocations for general fee organizations to ensure efficient use of limited resources, including office/equipment maintenance and ongoing upgrades of facilities.
- 7. Assists in planning and supports the University's response to situations and emergencies impacting individual and overall student safety and welfare; implementing an early alert process that identifies and responds to campus issues and concerns.
- 8. Assumes administrative responsibility for the Department of Student Life in absence of the Dean and Associate Dean.
- 9. Serves on university and division committees as requested.
- 10. Enhances professional growth and development through participation in continuing education courses, professional organizations, seminars and workshops, reading current literature and maintaining professional contacts in the community.
- 11. Performs other functionally related duties as assigned.

**Individual Competencies**

**Work Quality/Quality Standards/Quality Service**

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Demonstrate high quality standards in all work
- Meet deadlines and notify affected parties when meeting deadline is not possible
- Interact with internal and external customers exhibiting professional courtesy, respect and quality service behaviors
- Present and promote a positive image of CSU
- Provide high levels of service in all situations

Employee Rating: Exceeds Expectations

Supervisor Rating: Outstanding

Employee Comments:

Supervisor Comments:

Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations.

**Interpersonal Relations/Team Interactions**

Below signifies MEETS All EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Create and/or contribute to a work climate that reflects trust, openness, and good relations among the University community.
- Work cooperatively with supervisors to accomplish tasks and is willing to accept advice and follow directions
- Work cooperatively with team to ensure outcomes and high levels of service
- Demonstrate an ability to effectively manage conflict
- Recognize the diversity of the campus community and treat everyone with equal respect and dignity

Employee Rating: Exceeds Expectations

Supervisor Rating: Exceeds Expectations

Employee Comments:

Supervisor Comments:

Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations. I consider Steve to be a team player anwilling to work with fellow staff.

**Communication Skills**

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Effectively use oral and written communication skills to convey ideas to others in a clear and informative manner.
- Be tactful and professional in all oral and written communications
- Display good listening skills
- Keep appropriate CSU staff informed, including supervisor, when information received is (or could be) relevant to them
- Provide for timely, accurate and complete information between various departments in a helpful, assistive manner

Employee Rating: Exceeds Expectations

Supervisor Rating: Meets All Expectations

Employee Comments:

Supervisor Comments:

Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations.

**Productivity, Initiative and Creativity**

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Distinguish between necessary and unnecessary activities
- Effectively plan work to avoid constant deadline crises
- Effectively organize own work schedule
- Find ways to "add value"
- Work effectively and efficiently under general supervision where only broad work instructions are provided.
- Recommend and/or implement improvements to methods, procedures, and services
- Effectively utilize department resources, identify and secure external resources (as applicable)
- Keep current on recent developments and new information in his/her department or field, including new technology, equipment, programs, and services

Employee Rating: Meets All Expectations

Supervisor Rating: Meets All Expectations

Employee Comments:

Supervisor Comments:

Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations.

#### Analytical Skills, Report Writing, Data Management and Analysis

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Adhere to financial and record keeping procedures of department and University
- Maintain documentation that is complete, organized, legible, and concise
- Search for and investigate many different kinds of relevant information to assist in decision-making
- Demonstrate the ability to discover, understand, and verbalize the concepts and ideas held by others
- Use analytical skills to review information and formulate alternative solutions to problem
- Articulate the pros and cons of alternatives when devising plans or courses of action

Employee Rating: Meets All Expectations

Supervisor Rating: Exceeds Expectations

Employee Comments:

Supervisor Comments:

Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations.

#### Leadership/ People Management/ Managing Performance of Others

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Set clear focus and direction
- Provide ongoing feedback and coaching to employees
- Define roles and responsibilities and set clear expectations for performance
- Challenge and motivate employees
- Apply clear and consistent performance standards
- Handle performance issues decisively and objectively
- Manage collaboratively
- Make decisions systematically

- Maximize the diversity of the team to meet business objectives

Employee Rating: Meets All Expectations

Supervisor Rating: Meets All Expectations

Employee Comments:

Supervisor Comments:

Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations.

**Project, Meeting and Time Management**

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Manage multiple priorities effectively
- Set priorities and delegates effectively
- Set clear meeting agendas and involve appropriate people for meetings
- Manage tasks and responsibilities for all departmental projects
- Meet project deadlines or communicate effectively when deadlines are compromised

Employee Rating: Exceeds Expectations

Supervisor Rating: Meets All Expectations

Employee Comments:

Supervisor Comments:

Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations.

**Next Year's Goal Statements**

**7 Records**

Goal:	Goal Met:	Employee Comments:
Board of Elections "extraction" from SGA more fully implemented.	Yes	BOE Constitution and SGA Election Rules fully revised by Advisory Council and approved per protocol.

Continue to explore CSI staffing alternatives; e.g. addition of staff to proved front desk coverage.	Yes	
Continue to support development of Greek Life strategic plan.	No	
Data collection and associated report production process refined.	No	Data and report capabilities of OrgSync need to be utilized.
Streamline student organization administration process.	No	In collaboration with CSI staff.
Support and/or facilitate creative efforts to market on-campus involvement opportunities to CSU students.	No	Need to complete CSI brochure, take full advantage of OrgSync.
Support maximum/ideal use of student organization spaces in new Student Center.	No	In conjunction with CSI staff and Student Center Manager.

**Overall Rating Comments**

Overall Performance Rating

Overall Performance Rating: Exceeds Expectations

**Comments**

Supervisor Comments: Steve is an excellen student affairs professional. His strengths are student advising, particularly one on one; organization; and productivity.

Employee Comments:

Next Level Supervisor Comments: Steve, Thanks for doing such a wonderful job! Your efforts are really appreciated! -Jim

**Notes/History**

- 09-15-2010 4:10 PM Steven Liss
- Saved Without Submitting*
- 09-15-2010 4:26 PM Steven Liss
- Save*
- 09-15-2010 4:29 PM Steven Liss

Save	09-17-2010 9:10 PM	Steven Liss
Save	09-24-2010 11:36 AM	Steven Liss
Sent to Supervisor to Conduct Evaluation	10-04-2010 9:43 AM	Sandra Emerick
Save	10-12-2010 10:12 AM	Sandra Emerick
Evaluation Complete - Pending Discussion with Employee	10-13-2010 8:00 PM	Sandra Emerick
Discussion Complete - Sent to Employee for Review	10-15-2010 12:15 PM	Steven Liss
Reviewed - Sent to Supervisor	10-15-2010 1:02 PM	Sandra Emerick
Sent to Next Level Supervisor for Review or Approval	10-15-2010 1:54 PM	James Dinek
Save	10-15-2010 1:54 PM	James Dinek
Sent to HR for Review/Filing	10-21-2010 12:56 PM	Patricia Skerl
Evaluation Complete		

**View Professional Staff Annual or Probationary Performance  
Evaluation Summary - Dir, Student Involvement**

Evaluation Details			
Employee First Name:	Steven		
Employee Last Name:	Liss		
Employee ID Number:	1002241		
Employee Account Name:	Liss, Steven		
Business Title:	Dir, Student Involvement		
Job Code Title:	Director (Admin Prog)-7		
Evaluation Cycle:	Fiscal		
Evaluation Cycle Begin Date:	07/01/2010		
Evaluation Cycle End Date:	06/30/2011		
Department:	Student Life		
Supervisor:	Drnek, James		
Supervisor Title:	Vice Prov Stu Affrs/Dean Stdn / Provost & Sr VP, Academic Affrs		
Next Level Supervisor:	Mearns, Geoffrey		
Other Users in Department Who Need Access to this Evaluation:	Snell, Kim Mearns, Geoffrey Drnek, James		
Last Year's Goal Statements			
<b>7 Records</b>			
Goal:	Goal Met: (Entered by Supervisor)	Employee Comments:	Supervisor Comments:
Board of Elections "extraction" from SGA more fully implemented.	Yes	BOE Constitution and SGA Election Rules fully revised by Advisory Council and approved per protocol.	The BOE has become independent from SGA.
Continue to explore CSI	Yes		Student staff supervised by



CSU\_004560

staffing alternatives; e.g. addition of staff to provide front desk coverage.			the Office Coordinator, will provide coverage at the front desk.
Continue to support development of Greek Life strategic plan.	Yes	Format for Greek "study group" established; group to meet and develop draft of strategic plan during FY 2012.	Greek study group has been established. Group will begin drafting plan in FY 2012.
Data collection and associated report production process refined.	Yes	Data and report capabilities of OrgSync need to be utilized.	Capabilities for OrgSync continue to develop with cooperation from a wide variety of partners.
Streamline student organization administration process.	Yes	In collaboration with CSI staff.	OrgSync will support some issues associated with streamlining.
Support and/or facilitate creative efforts to market on-campus involvement opportunities to CSU students.	Yes	Need to complete CSI brochure, take full advantage of OrgSync.	Org Sync will allow the Center for Student Involvement to market involvement opportunities more easily to CSU students.
Support maximum/ideal use of student organization spaces in new Student Center.	Yes	In conjunction with CSI staff and Student Center Manager.	Students continue to use the space more and more.

#### Job Responsibilities

#### 11 Records

##### Responsibility:

1. Provides oversight and direction for effective operation of general fee and registered student organizations and student media by:
  - A. Overseeing the Center for Student Involvement, including registered organization resources and general fee work space.
  - B. Establishing goals and overall direction for staff charged with coordinating operations of registered student organizations, fraternity/sorority affairs, and student media. Serving as advisor for budget processes, personnel matters and administrative functions.
  - C. Ensuring that general fee organizations are operationally consistent with department audit requirements and all student organization policies and procedures.
  - D. Developing procedures for general fee student officer training, orientation, performance evaluation and transitioning. Hosting general fee advisor meetings to discuss issues/concerns and promote consistency of operations.
  - E. Implementing annual process for review and revision of general fee organization constitutions, organizational structures, officer selection, position descriptions, funding strategies and adherence to record retention policies.
  - F. Implementing assessment plan for supervised areas in conjunction with requirements and guidelines of CSU and Council for the Advancement of Standards in Higher Education.
  - G. Advising at least one general fee student organization by training/evaluating student officers, supporting the officer selection process, ensuring budget operations are consistent with department and university procedures and ensuring that all organizational initiatives contribute to an effective learning environment supportive of student involvement and retention.
2. Supports Faculty Senate Student Life Committee by serving as member of sub-committees (e.g. student conduct code, student organization policies, student leader scholarship policy). Makes recommendations regarding policy revision.

3. Coordinates activities of the General Fee Advisory Committee (GFAC) by:
  - A. Establishing GFAC agenda in collaboration with the Vice Provost.
  - B. Overseeing and ensuring compliance with fund request/allocation procedures.
  - C. Maintaining records, meeting minutes/summaries and content of GFAC web site. Coordinating and tracking work flow, schedules, projects and committee decisions.
  - D. Serving as primary point of direct administrative contact and liaison with committee members, faculty, staff and student campus constituencies.
  - E. Convening and chairing GFAC subcommittees and ad hoc task forces. Serving as chairperson of GFAC in absence of the Vice President.
4. Advises and provides operational oversight for the Student Government Association (SGA), including:
  - A. Advising and supporting SGA operations, including Executive Board, Senators, Student Appointments Board, Finance Committee, United Student Organizations, Print Shop, and other SGA committees.
  - B. Monitoring SGA budgets, ensuring financial recordkeeping follows established guidelines and department audit requirements.
  - C. Conducting monthly meetings with officers and once per semester performance appraisals with officers; attending cabinet, executive board and senate meetings.
  - D. Reviewing and monitoring documents to be presented before the student body.
5. Supervises assigned personnel by providing orientation, guidance, assistance and developmental training as required. Approves or makes recommendations regarding employment, performance appraisals, salary changes, promotions, transfers, and terminations.
6. Coordinates facility management and office space allocations for general fee organizations to ensure efficient use of limited resources, including office/equipment maintenance and ongoing upgrades of facilities.
7. Assists in planning and supports the University's response to situations and emergencies impacting individual and overall student safety and welfare; implementing an early alert process that identifies and responds to campus issues and concerns.
8. Assumes administrative responsibility for the Department of Student Life in absence of the Dean and Associate Dean.
9. Serves on university and division committees as requested.
10. Enhances professional growth and development through participation in continuing education courses, professional organizations, seminars and workshops, reading current literature and maintaining professional contacts in the community.
11. Performs other functionally related duties as assigned.

#### Individual Competencies

##### Work Quality/Quality Standards/Quality Service

Below signifies MEETS All EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Demonstrate high quality standards in all work
- Meet deadlines and notify affected parties when meeting deadline is not possible
- Interact with internal and external customers exhibiting professional courtesy, respect and quality service behaviors
- Present and promote a positive image of CSU
- Provide high levels of service in all situations

Employee Rating:	Exceeds Expectations
Supervisor Rating:	Outstanding
Employee Comments:	I strive to communicate to all members of the CSU Community that I truly care about the institution and all members (students, faculty, staff).
Supervisor Comments:	
Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations.	Steve presents a very positive image of CSU to the entire community. Steve is student-centered in his approach to advising and working with students and others.

**Interpersonal Relations/Team Interactions**

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Create and/or contribute to a work climate that reflects trust, openness, and good relations among the University community
- Work cooperatively with supervisors to accomplish tasks and is willing to accept advice and follow directions
- Work cooperatively with team to ensure outcomes and high levels of service
- Demonstrate an ability to effectively manage conflict
- Recognize the diversity of the campus community and treat everyone with equal respect and dignity

Employee Rating:	Exceeds Expectations
Supervisor Rating:	Exceeds Expectations
Employee Comments:	
Supervisor Comments:	
Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations.	Steve has good interpersonal skills and works extremely well with others.

**Communication Skills**

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Effectively use oral and written communication skills to convey ideas to others in a clear and informative manner

- Be tactful and professional in all oral and written communications
- Display good listening skills
- Keep appropriate CSU staff informed, including supervisor, when information received is (or could be) relevant to them
- Provide for timely, accurate and complete information between various departments in a helpful, assistive manner

Employee Rating:	Exceeds Expectations
Supervisor Rating:	Meets All Expectations
Employee Comments:	Actually one of my stronger points....although some have said that I tend to be too tactful/careful at times.
Supervisor Comments:	
<b>Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations.</b>	

**Productivity, Initiative and Creativity**

Below signifies MEETS All EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Distinguish between necessary and unnecessary activities
- Effectively plan work to avoid constant deadline crises
- Effectively organize own work schedule
- Find ways to "add value"
- Work effectively and efficiently under general supervision where only broad work instructions are provided
- Recommend and/or implement improvements to methods, procedures, and services
- Effectively utilize department resources, identify and secure external resources (as applicable)
- Keep current on recent developments and new information in his/her department or field, including new technology, equipment, programs, and services.

Employee Rating:	Exceeds Expectations
Supervisor Rating:	Exceeds Expectations
Employee Comments:	
Supervisor Comments:	
<b>Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations.</b>	
	Steve is extremely productive, working with minimal supervision. Steve is very organized in his approach to work.

**Analytical Skills, Report Writing, Data Management and Analysis**

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Adhere to financial and record keeping procedures of department and University
- Maintain documentation that is complete, organized, legible, and concise
- Search for and investigate many different kinds of relevant information to assist in decision-making
- Demonstrate the ability to discover, understand, and verbalize the concepts and ideas held by others
- Use analytical skills to review information and formulate alternative solutions to problem
- Articulate the pros and cons of alternatives when devising plans or courses of action

Employee Rating: Exceeds Expectations

Supervisor Rating: Exceeds Expectations

Employee Comments:

Supervisor Comments:

Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations. Steve makes good decisions based on thoughtful consideration of data and other relevant pieces of info.

**Leadership/People Management/Managing Performance of Others**

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Set clear focus and direction
- Provide ongoing feedback and coaching to employees
- Define roles and responsibilities and set clear expectations for performance
- Challenge and motivate employees
- Apply clear and consistent performance standards
- Handle performance issues decisively and objectively
- Manage collaboratively
- Make decisions systematically
- Maximize the diversity of the team to meet business objectives

Employee Rating: Meets All Expectations

Supervisor Rating: Meets All Expectations

Employee Comments:	I very much appreciate the Dean's support in this area; our staff has many years of experience... which can sometimes result in unique challenges.
Supervisor Comments:	
Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations.	Steve does a good job leading the staff and students in the Center for Student Involvement. Leading this group is not always an easy task.

**Project, Meeting and Time Management**

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Manage multiple priorities effectively
- Set priorities and delegates effectively
- Set clear meeting agendas and involve appropriate people for meetings
- Manage tasks and responsibilities for all departmental projects
- Meet project deadlines or communicate effectively when deadlines are compromised

Employee Rating: Exceeds Expectations

Supervisor Rating: Exceeds Expectations

Employee Comments:	
Supervisor Comments:	Steve does a great job taking on projects. One example of this would be the OrgSync project. Orgsync will move administration and management of all student organizations into an electronic environment. Steve has worked hard to move this initiative forward aggressively.
Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations.	

**Next Year's Goal Statements**

**7 Records**

Goal:	Goal Met	Employee Comments:
Begin process of Advising Viking Expeditions and associated Service Funding process.		Need to further explore connection to Honors Program.
Continue to support and/or facilitate creative efforts to market on-campus involvement opportunities to CSU students.		Focus on electronic media.
Continue implementation/integration of OrgSync.		Explore possible connection to facility reservation process.
Continue to support development of Greek Life strategic plan.		In conjunction with Greek Coordinator.
Explore options for enhancing evening and weekend		In collaboration with Student Life.

programming in conjunction with student organizations. Streamline student organization administration process.	staff. Focus on OrgSync
Support transition process for SGA and BOE Advising.	In conjunction with Student Center Manager and Associate Dean.
<b>Overall Rating Comments</b>	
<b>Overall Performance Rating</b>	
Overall Performance Rating:	Exceeds Expectations
<b>Comments</b>	
Supervisor Comments:	Steve is a wonderful professional who excels at working closely with students. Steve is extremely well organized and productive. Steve is very thoughtful and contemplates the many facets of an issue, offering great insights. Steve has done really well taking on new projects.
Employee Comments:	
Next Level Supervisor Comments:	
<b>Notes/History</b>	
08-24-2011 9:53 AM	James Drnek
<i>Saved Without Submitting</i>	
08-24-2011 10:20 AM	James Drnek
<i>Save</i>	
08-31-2011 4:14 PM	James Drnek
<i>Sent to Employee to Conduct Self Evaluation</i>	
09-06-2011 11:54 AM	Steven Liss
<i>Save</i>	

09-16-2011 11:10 AM	Steven Liss
<i>Save</i>	
09-16-2011 1:54 PM	Steven Liss
<i>Sent to Supervisor to Conduct Evaluation</i>	
09-16-2011 3:11 PM	James Drnek
<i>Save</i>	
09-22-2011 11:26 AM	James Drnek
<i>Save</i>	
09-22-2011 11:26 AM	James Drnek
<i>Evaluation Complete - Pending Discussion with Employee</i>	
09-23-2011 10:24 AM	Steven Liss
<i>Discussion Complete - Sent to Employee for Review</i>	
09-23-2011 10:25 AM	Steven Liss
<i>Reviewed - Send to Supervisor</i>	
09-23-2011 12:35 PM	James Drnek
<i>Send to Next Level Supervisor for Review or Approval</i>	
09-26-2011 10:04 AM	Geoffrey Mearns
<i>Sent to HR for Review/Filing</i>	
09-26-2011 4:47 PM	Maria Krasniansky
<i>Evaluation Complete</i>	

View Professional Staff Annual or Probationary Performance Evaluation Summary - Dir, Student Involvement

Evaluation Details	
Employee First Name:	Steven
Employee Last Name:	Liss
Employee ID Number:	1002241
Employee Account Name:	Liss, Steven
Business Title:	Dir, Student Involvement
Job Code Title:	Director (Admin Prog)-7
Evaluation Cycle:	Fiscal
Evaluation Cycle Begin Date:	07/01/2011
Evaluation Cycle End Date:	06/30/2012
Department:	Student Life
Supervisor:	Banks, Willie
Supervisor Title:	Assoc Dean, Student Life / Vice Prov Stu Affrs/Dean Stdn
Next Level Supervisor:	Drnek, James
Other Users in Department Who Need Access to this Evaluation:	Lee, Olga Drnek, James Banks, Willie
Last Year's Goal Statements	
7 Records	
Goal:	Goal Met
(Entered by Supervisor)	Supervisor
Employee Comments:	Supervisor Comments:
Begin process of Advising Viking Expeditions and associated Service Funding process. Yes Became VE Advisor in August, 2011. Six service trips were facilitated. Four rounds of service funding took place and 18 projects were fiscally supported. Honors 2011 Completed	



		class taught in conjunction with Program Director; prepared syllabus; reviewed participant projects; and hosted post-travel reflection sessions.	
<b>Continue to support and/or facilitate creative efforts to market on-campus involvement opportunities to CSU students.</b>	Yes	Introduced OrgSync to campus; more than 1,600 members of the community were registered; student organization participation reached an alltime high of 211 active groups (previous high was 192).	Continue to think of creative ways to encourage more student involvement.
<b>Continue implementation/integration of OrgSync.</b>	Yes	More than 50 training sessions were hosted for more than 300 students and faculty/staff advisors. OrgSync Launch Party hosted by CSI and SGA in December. More than 160 of 211 groups were using OrgSync by the end of FY12.	Ongoing project that will need buy in and greater participation from the Coordinator of Student Organizations.
<b>Continue to support development of Greek Life strategic plan.</b>	No	Greek Coordinator missed significant portion of Fall Semester with a serious health issue. Moving forward in FY13 with Greek Life Performance Improvement Plan.	The Greek Life strategic plan and relationship agreement will need to be high on the list of priorities for the coming year.
<b>Explore options for enhancing evening and weekend programming in conjunction with student organizations.</b>	Yes	Worked with SGA to establish a new "automatic" funding process for amounts up to \$250 during my final months as Advisor (through August 2011); these monies were often used to cover facility and/or police costs associated with evening activities.	Completed - due to change in responsibilities this was only a goal through Aug. '11.
<b>Streamline student organization administration process.</b>	No	Officer Trainings were offered by three CSI staff members (vs. one in the past) to offer students more options for attending. Additional and more complete materials on CSI website supported all aspects of student group functioning. Process of exploring ways to incorporate online officer orientations was initiated.	More work will be needed in FY 13 to fully integrate OrgSync into the org. process.
<b>Support transition process for SGA and BOE Advising.</b>	Yes	BOE advisory role was moved on an interim basis to the Student Media Specialist. SGA role was transitioned to Student Center Manager.	completed
<b>Job Responsibilities</b>			
<b>11 Records</b>			
<b>Responsibility:</b>			

1. Provides oversight and direction for effective operation of general fee and registered student organizations and student media by:
  - A. Overseeing the Center for Student Involvement, including registered organization resources and general fee work space.
  - B. Establishing goals and overall direction for staff charged with coordinating operations of registered student organizations, fraternity/sorority affairs, and student media. Serving as advisor for budget processes, personnel matters and administrative functions.
  - C. Ensuring that general fee organizations are operationally consistent with department audit requirements and all student organization policies and procedures.
  - D. Developing procedures for general fee student officer training, orientation, performance evaluation and transitioning. Hosting general fee advisor meetings to discuss issues/concerns and promote consistency of operations.
  - E. Implementing annual process for review and revision of general fee organization constitutions, organizational structures, officer selection, position descriptions, funding strategies and adherence to record retention policies.
  - F. Implementing assessment plan for supervised areas in conjunction with requirements and guidelines of CSU and Council for the Advancement of Standards in Higher Education.
  - G. Advising at least one general fee student organization by training/evaluating student officers, supporting the officer selection process, ensuring budget operations are consistent with department and university procedures and ensuring that all organizational initiatives contribute to an effective learning environment supportive of student involvement and retention.
2. Supports Faculty Senate Student Life Committee by serving as member of sub-committees (e.g. student conduct code, student organization policies, student leader scholarship policy). Makes recommendations regarding policy revision.
3. Coordinates activities of the General Fee Advisory Committee (GFAC) by:
  - A. Establishing GFAC agenda in collaboration with the Vice Provost.
  - B. Overseeing and ensuring compliance with fund request/allocation procedures.
  - C. Maintaining records, meeting minutes/summaries and content of GFAC web site. Coordinating and tracking work flow, schedules, projects and committee decisions.
  - D. Serving as primary point of direct administrative contact and liaison with committee members, faculty, staff and student campus constituencies.
  - E. Convening and chairing GFAC subcommittees and ad hoc task forces. Serving as chairperson of GFAC in absence of the Vice President.
4. Advises and provides operational oversight for the Student Government Association (SGA), including:
  - A. Advising and supporting SGA operations, including Executive Board, Senators, Student Appointments Board, Finance Committee, United Student Organizations, Print Shop, and other SGA committees.
  - B. Monitoring SGA budgets, ensuring financial recordkeeping follows established guidelines and department audit requirements.
  - C. Conducting monthly meetings with officers and once per semester performance appraisals with officers; attending cabinet, executive board and senate meetings.
  - D. Reviewing and monitoring documents to be presented before the student body.
5. Supervises assigned personnel by providing orientation, guidance, assistance and developmental training as required. Approves or makes recommendations regarding employment, performance appraisals, salary changes, promotions, transfers, and terminations.
6. Coordinates facility management and office space allocations for general fee organizations to ensure efficient use of limited resources, including office/equipment maintenance and ongoing upgrades of facilities.
7. Assists in planning and supports the University's response to situations and emergencies impacting individual and overall student safety and welfare; implementing an early alert process that identifies and responds to campus issues and concerns.
8. Assumes administrative responsibility for the Department of Student Life in absence of the Dean and Associate Dean.
9. Serves on university and division committees as requested.
10. Enhances professional growth and development through participation in continuing education courses, professional organizations, seminars and workshops, reading current literature and

maintaining professional contacts in the community.

11. Performs other functionally related duties as assigned.

### Individual Competencies

#### Work Quality/Quality Standards/Quality Service

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Demonstrate high quality standards in all work
- Meet deadlines and notify affected parties when meeting deadline is not possible
- Interact with internal and external customers exhibiting professional courtesy, respect and quality service behaviors
- Present and promote a positive image of CSU
- Provide high levels of service in all situations

Employee Rating: Meets All Expectations

Supervisor Rating: Meets All Expectations

Employee Comments: I truly care about CSU as an institution...and perhaps even more so. I care for and respect the individuals that make up the University. This year has been unique in that a new supervisor is appropriately bringing new expectations to the role of overseeing direct reports in the Student Involvement area. I am working diligently to respond to these expectations -- and look forward to improving over time.

Supervisor Comments:

Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations. More work will need to be done to ensure that all members of the CSI staff live up to expectations regarding quality of work.

#### Interpersonal Relations/Team Interactions

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Create and/or contribute to a work climate that reflects trust, openness, and good relations among the University community
- Work cooperatively with supervisors to accomplish tasks and is willing to accept advice and follow directions
- Work cooperatively with team to ensure outcomes and high levels of service
- Demonstrate an ability to effectively manage conflict
- Recognize the diversity of the campus community and treat everyone with equal respect and

dignity

Employee Rating: Meets All Expectations

Supervisor Rating: Improvement Needed

Employee Comments: One of my strengths is interacting with students in an advisory capacity. I also strive to be a good team member whenever that opportunity arises. Over the past year I've made several presentations to students affiliated with other University departments or programs (e.g. Trip, ASC 101, Residence Life, International Student Services). I also volunteered to serve on a variety of University Committees (e.g. University of the Free State, Residence Life Contract Review, Viking Card, Dining Services & Catering).

Supervisor Comments:

Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations.

Steve will need to improve on his interpersonal relationships with his employees and confronting behavior that is not appropriate in the workplace and holding employees accountable for their behavior. Steve struggles with addressing and resolving conflict.

#### Communication Skills

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Effectively use oral and written communication skills to convey ideas to others in a clear and informative manner
- Be tactful and professional in all oral and written communications
- Display good listening skills
- Keep appropriate CSU staff informed, including supervisor, when information received is (or could be) relevant to them
- Provide for timely, accurate and complete information between various departments in a helpful, assistive manner

Employee Rating: Meets All Expectations

Supervisor Rating: Meets Most Expectations

Employee Comments: I strive to be an effective communicator. I can sometimes, however, be too careful and/or attempt to be too tactful in my communications – which can muddy the waters. I am working to be more direct when this approach is called for. For example, I am working with Human Resources to develop a Performance Improvement Plan for one of my staff members – which includes specific action steps and a regular feedback process.

Supervisor Comments:	Steve can over analyze situations and at times, struggle to make decisions which in turns affect his communication with others. I would encourage Steve to work on communicating more effectively with his staff and providing solid feedback for improvement.
Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations.	

**Productivity, Initiative and Creativity**

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Distinguish between necessary and unnecessary activities
- Effectively plan work to avoid constant deadline crises
- Effectively organize own work schedule
- Find ways to "add value"
- Work effectively and efficiently under general supervision where only broad work instructions are provided
- Recommend and/or implement improvements to methods, procedures, and services
- Effectively utilize department resources; identify and secure external resources (as applicable)
- Keep current on recent developments and new information in his/her department or field, including new technology, equipment, programs, and services

Employee Rating:	Meets All Expectations
Supervisor Rating:	Improvement Needed
Employee Comments:	I endeavor to be hard working and productive. I am organized, and can be creative at times -- while at others I can get locked in to doing things in the same old way. I do want to challenge myself and my staff to think in new and innovative ways. For example, we are introducing a student success workshop series for organizations implementing a new scheduling process in the CSI area, and adding several new OrgSync components for FY12 based on best practices.
Supervisor Comments:	Steve needs to be more creative and up to date in his work. He needs to embrace technology, and programs and services for the newer generation of students. Additionally, Steve needs to take more initiative to make decisions for his area and when interpreting policies and procedures.
Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations.	

**Analytical Skills, Report Writing, Data Management and Analysis**

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Adhere to financial and record keeping procedures of department and University
- Maintain documentation that is complete, organized, legible, and concise
- Search for and investigate many different kinds of relevant information to assist in decision-

making

- Demonstrate the ability to discover, understand, and verbalize the concepts and ideas held by others
- Use analytical skills to review information and formulate alternative solutions to problem
- Articulate the pros and cons of alternatives when devising plans or courses of action

Employee Rating: Meets All Expectations

Supervisor Rating: Meets Most Expectations

Employee Comments: I have typically met or exceeded the expectations that have previously been set forth by my supervisors in Student Life. I was part of our in-house assessment team for years...and have frequently collected data from Urban 13 (and other) institutions to help make informed decisions about Student Life programs and services. However, I do know that we can do more with data collection, management, and analysis -- and expect this to be a focus moving forward.

Supervisor Comments:

Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations. I would like to see Steve use more of his analytical skills to evaluate data and provide solutions to problems.

#### Leadership/People Management/Managing Performance of Others

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Set clear focus and direction
- Provide ongoing feedback and coaching to employees
- Define roles and responsibilities and set clear expectations for performance
- Challenge and motivate employees
- Apply clear and consistent performance standards
- Handle performance issues decisively and objectively
- Manage collaboratively
- Make decisions systematically
- Maximize the diversity of the team to meet business objectives

Employee Rating: Meets All Expectations

Supervisor Rating: Improvement Needed

Employee Comments: This area has always been a unique/interesting challenge, as I took over a Student Life Unit that was staffed by long term individuals who were, to some extent, set in their ways and protocols. Overall, the three key members of my unit -- not including myself -- have

	<p>more than 35 collective years of professional experience at CSU. Their work was consistently rated highly prior to my arrival on the scene -- so breaking through with new approaches is not always easy. Nevertheless, I do attempt to bring new ideas to the table and support professional development whenever possible. I truly feel that all of these folks care about CSU and our students in an energetic and positive fashion. Hence, I feel optimistic about moving forward as a team in the right way.</p>
<p>Supervisor Comments:</p> <p>Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations.</p>	<p>Steve needs to take a larger role in providing guidance and leadership to his area and asserting his authority as the Director. The staff in this area has struggled with technology and has difficulty dealing with change. Many times Steve has picked up the responsibilities for many of his staff members. He needs to hold his staff accountable for their work and set clear expectations for the work that is to be expected from his unit.</p>

**Project, Meeting and Time Management**

Below signifies MEETS ALL EXPECTATIONS performance. Rating in this area should be based on applicability to the employee's current position and job duties. This competency is defined as the ability to:

- Manage multiple priorities effectively
- Set priorities and delegates effectively
- Set clear meeting agendas and involve appropriate people for meetings
- Manage tasks and responsibilities for all departmental projects
- Meet project deadlines or communicate effectively when deadlines are compromised

Employee Rating:	Meets All Expectations
Supervisor Rating:	Meets All Expectations
Employee Comments:	I am typically excited to take on new projects -- particularly if they are likely to enhance the involvement experience of our students. I am reasonably good with time management, but can struggle to say "no" or limit the items added to my plate.
Supervisor Comments:	
Supervisor comments are required for any ratings other than Meets All Expectations or Meets Most Expectations.	I agree with Steve's assessment of himself in the area of project, meeting, and time management.

**Next Year's Goal Statements**

5 Records

Goal:	Goal Met:	Employee Comments:
Contribute to student success, a collaborative organizational structure, and a vibrant environment by supporting appropriate		Implementation of Greek Chapter requirements will likely

staff in developing and enforcing a Greek Life Performance Improvement Plan that will bring CSU more in line with national protocols.	require approval by the Faculty Senate Student Life Committee.
Develop a student success workshop series targeting specific developmental and practical student organization needs.	Workshop series to include evaluative component in keeping with Student Life standards.
Enhance potential for student success via student organizations by developing a new CSI staff scheduling protocol to support facilitation of appointments and drop-ins.	To begin with Fall Semester 2012.
Provide advisory support to Viking Expeditions in their quest to serve as a valued community resource by assisting with: (a) revision of their Constitution and Operations Manual, (b) development of a formal membership program, (c) expansion of local service opportunities, and (d) exploration of international trip possibilities.	Development of International Trip opportunities must be in collaboration with Center for International Students and Programs.
Support individual student and student group success by furthering implementaton/integration of OrgSync -- including required use for annual organization registrations and outreach possibilities in conjunction with other Student Affairs Units.	Allowing broader Student Affairs use of OrgSync will likely require an increase in portal space -- and hence carry a cost for said upgrade.

**Overall Rating Comments**

**Overall Performance Rating**

Overall Performance Rating: Meets Most Expectations

**Comments**

Supervisor Comments:	This has been a challenging year for CSI and for Steve as the supervisor for this area. Steve needs to improve his supervision skills and hold his staff accountable for their action or lack of action. He needs to be more decisive in making decisions and communicating those decisions to staff or students. Additionally, he needs to be more critical in his analysis of policies and procedures and provide more alternative solutions to situations and problems that arise.
Employee Comments:	I am excited about the challenges to come on campus -- in particular with regards to enhancing the concept of student involvement. Our work in CSI and Student Life is directly connected to engagement, persistence, and success, and therefore contributes to the University System of Ohio's goal of higher retention and graduation rates. I look forward to working with all members of the DSL and Student Affairs team in order to more fully assess in a quantitative and qualitative fashion the means by which we can best support our student body.
Next Level Supervisor Comments:	

Notes/History	
07-30-2012 2:50 PM	Steven Liss
<i>Saved Without Submitting</i>	
07-30-2012 3:01 PM	Steven Liss
<i>Save</i>	
07-31-2012 2:45 PM	Steven Liss
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<i>Sent to Supervisor to Conduct Evaluation</i>	
08-21-2012 3:53 PM	Willie Banks
Save	
08-21-2012 4:03 PM	Willie Banks
Save	
08-21-2012 4:03 PM	Willie Banks
Save	
08-21-2012 4:26 PM	Willie Banks
Save	
08-24-2012 8:48 AM	Willie Banks
<i>Sent to Next Level Supervisor for Review or Approval</i>	
08-24-2012 8:49 AM	James Dimek

*Next Level Supervisor Reviewed/Approved-Send to Supervisor*

**08-27-2012 2:33 PM**

**Willie Banks**

*Sent to HR for Review/Filing*

**08-29-2012 5:47 PM**

**Richard Horsfall**

*Evaluation Complete*



Hello!  
Willie L. Banks to: Jean M McCafferty

05/14/2012 05:35 PM

History: This message has been replied to.

Jean,

It was so nice to meet with you today.

As promised, I am attaching working copies of the Position Descriptions (PD) we discussed today.

Please let me know if you need anything else from me!

Many thanks!

WB



Coordinator of GL & Commuter Programs PD.docx



Coordinator of Student Organizations PD.docx



Director of Center for Student Involvement PD.docx

Dr. Willie L. Banks, Jr.

Associate Dean of Students

Student Life

Cleveland State University

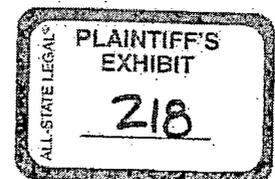
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216-687-2048

216-687-5441 (fax)

[www.csuohio.edu/studentlife](http://www.csuohio.edu/studentlife)



CSU\_006915

**From:** James M Drnek  
**To:** Steven W Vartorella  
**Cc:** Willie L Banks; Denise K Mutti; Jean M McCafferty  
**Subject:** Re: Meet to review reorg plan  
**Date:** Tuesday, May 01, 2012 10:48:00 AM

---

Thanks! See you then. -Jim

Dr. Jim Drnek, Dean of Students &  
Vice Provost for Student Affairs  
Cleveland State University

2121 Euclid Ave  
Cleveland, OH 44115  
Ph: 216-687-2048 - fax: 216-687-5441  
j.m.drnek@csuohio.edu

Steven W Vartorella---05/01/2012 10:07:40 AM---Jim and Willie, The 14th at 3:00 PM works for me/us. From an HR perspective, I have asked Denise Mut

From: Steven W Vartorella/s.vartorella@CSUOHIO  
To: James M. Drnek/j.m.drnek@CSUOHIO@CSUOHIO  
Cc: Willie L Banks/w.l.banks@CSUOHIO@CSUOHIO, Denise K Mutti/d.mutti@CSUOHIO@CSUOHIO, Jean M McCafferty/j.m.mccafferty1@CSUOHIO@CSUOHIO  
Date: 05/01/2012 10:07 AM  
Subject: Re: Meet to review reorg plan

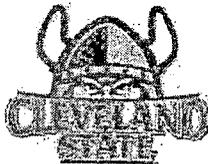
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Jim and Willie,

The 14th at 3:00 PM works for me/us. From an HR perspective, I have asked Denise Mutti and Jean McCafferty to join us. We will be meeting in the HR conference room. Please let me know if there are any questions. Thanks.

Steve V.

Steve Vartorella  
Human Resource Generalist  
Cleveland State University  
Human Resources Development and Labor Relations  
Office: (216) 687-2158  
Fax: (216) 687-9334  
E-mail: s.vartorella@csuohio.edu



North Coast  
WINNER



CSU\_009559

James M Drnek---05/01/2012 09:30:48 AM---Hi Steve, Are you free on 5/14 at 3pm to discuss a possible reorg plan for the Student Life (specif

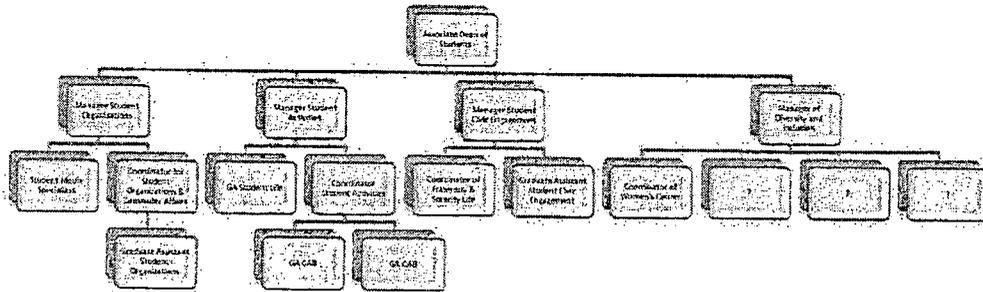
From: James M Drnek/j.m.drnek@CSUOHIO  
To: Steven W Vartorella/s.vartorella@CSUOHIO@CSUOHIO  
Cc: Willie L Banks/w.l.banks@CSUOHIO@CSUOHIO  
Date: 05/01/2012 09:30 AM  
Subject: Meet to review reorg plan

---

Hi Steve, Are you free on 5/14 at 3pm to discuss a possible reorg plan for the Student Life (specifically the Center for Student Involvement)? Please let me know. Attendees will be you, Willie Banks, and I over in HR. Thanks, Jim

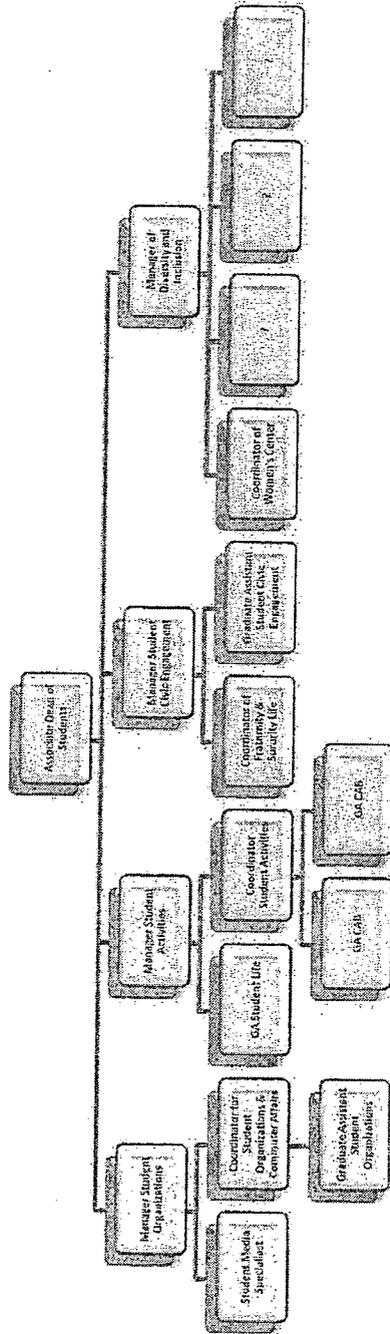
Dr. Jim Drnek, Dean of Students &  
Vice Provost for Student Affairs  
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