|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Responsive to the Component** | **Evidence** | **Analysis: Explanation/ Rationale of Assertions Supported by Evidence** | **Overall**  **Judgment** | **Comments** |
| 1. What does the unit do? | Accepted without recommendations |  |  | Accepted without recommendations | This seems to follow good business practice. There are links and good evidence. Very thorough and explains the various components of the service unit well: Accounting, Accounts Payable, Budget, Payroll, and Student Financial Services. I think we can all agree payroll is supported and needed for operation of the college. |
| 2. What is the unit’s relationship to the college mission & strategic plan? | Accepted without recommendations | Accepted without recommendations | Accepted without recommendations | Accepted without recommendations | Responded to all questions . Present for mission and strategic goals  Table of stakeholders provided Mission: The school cannot fulfill their mission without a financial structure. BAS supports all services necessary within the operation of the college. Supports strategic goal # 5- Has a planned succession model and #6- Coordination with external stakeholders. Very thorough, although I don’t know that the links to the Board Policy, Texas comptroller site, the 1098-frm, Education code, etc. (all the links within Workday, etc.) were needed in this document.  Show department hierarchy, describes succession, workday implementation guides. |
| 3. Why are the unit processes done? | Accepted without recommendations | Accepted without recommendations | Accepted without recommendations | Accepted without recommendations | Challenges and continuing adoption of Workday is addressed. Unit processes for each area were explained with rationale and legal compliance as necessary All very well detailed. Is it possible (and would it be helpful) to separate the payroll payments for clarity? The first paragraph has deposits, paychecks to part-time, and paychecks to full-time processes all as one process (per the description). Could they also more clearly delineate between what they handle and what is now handled by individual employees on Workday? Although interesting to some, I’m not sure that all of the tables and charts were necessary in the report – the document asks why unit processes are done. This could be explained without all the charts (still not sure why the square footage chart was in there? Or the need for the picture of the GFOA Certificate) |
| 4. How does the unit impact student outcomes? | Accepted with recommendations | Accepted with recommendations | Accepted with recommendations | Accepted with recommendations | Answered questions. Student outcomes met with student financial services. Most recent data from national surveys and IRO included. Changes in outcomes explained with the transition to Workday. Could add the number of student scholarships, grants and other tuition assistance received which allows students to attend college. Student experience evaluated. Faculty and staff experience also evaluated with respect to the areas they interact with.  Several survey results. Although they have the numbers in part in various charts, it would help to know the total number of students surveyed as well - as what percentage that is of the total student body – when they introduce the results of the student survey. Additionally, are they doing anything to address the dissatisfaction with the hours? Although they explained that their department has an indirect impact on student outcomes by supporting several other departments – then they went off on tangent of student satisfaction – which I’m not sure has any impact on student outcomes. Having the info of the % of Collin students that were surveyed in the 2022 Noel-Levitz survey would be good to know. For the IRO survey – interesting that there were only 1-2 comments used from most campuses, but 4X that from the Plano Campus – not sure if that was IRO when report was done or what they just pulled for this review. Also not exactly sure how the student satisfaction survey shows how the unit impacts student outcomes. |
| 5. How effectively does the unit communicate? | Accepted with recommendations | Accepted with recommendations | Accepted with recommendations | Accepted with recommendations | In the previous section it was mentioned a concerted effort to improve communication by updating the procedures manual and improving Workday guidance.  The report notes students can find tuition in 1 click and mentions that Workday will be updated. No evidence of the effort they mentioned in the previous section exists. No evidence of any changes made is provided. Communication with students and faculty with respect to Workday transition is not addressed. They have done several things, but they are not included here.  Did a literature review of the reports and data they make available. They do allude to Workday being a new program, but no analysis of communication within workday is provided. Has graphics, more verbal explanation would help understand some of the charts. They did not answer the “how do we know” portion of the question. The response shows a link to manual and other links – but it does not really explain how effective the communication is – and does not answer the questions how do we know at all. The review also says to see table below for Unit Literature Review Table – but I did not find any Review Table in the document. Table was in appendices – should be addressed in the document |
| 6. Does the unit build and leverage partnerships? | Accepted without recommendations | Accepted without recommendations | Accepted without recommendations | Accepted without recommendations | Partnerships and purpose well documented on table I appreciate the details in explaining the table. I would like more written. I don’t understand why in the first half of the document, there are so many visuals and links that make it hard to follow, and then for the last few questions, instead of putting the simple table in the document, you put it into an appendix and have little information to respond to the prompt in the actual review document. I don’t agree with the process – but the information is in the appendices. |
| 7. Are staff supported with professional development? | Accepted without recommendations | Accepted without recommendations | Accepted without recommendations | Accepted without recommendations | Minimal statement – they are encouraged to get development. Chart provided of professional development completed by employee. No discussion on adequacy of development or holes in areas of development. Staff participate in Professional development. They seem to be sectioned into types of development done. Meeting legal rules in the Texas Administrative Code. One employee, the payroll director, had no professional development. No comment as to if they are new, or what the role is. The document references the “table below”. The table is found in the appendix. For the people that are reviewing the document – listing out what TACCBO, THEBO, PCI, IOFM AP, COMTEC, are would be helpful since to those not in the world of Business Services – we have no idea what these are or whether or not they would be helpful because with just the initials, it is meaningless. Dates are on some of the PD, while others have no date. Be consistent |
| 8. [Optional] Does the unit have sufficient facilities and equipment? |  |  |  |  |  |
| 9. How have past CIPs contributed to success? | Accepted without recommendations | Accepted without recommendations | Accepted without recommendations | Accepted without recommendations | Don’t really answer the question.  They provide the CIP with their findings. Data shows improvement in efficiency and outcomes are met Workday was a big transition for this group. In Table 1 – expense Report Processing under the third column it has #DIV/0! – is this in error? What should this be? I think this should be a %, right? |
| 10. How will the unit evaluate its success? | Accepted without recommendations | Accepted with recommendations | Accepted with recommendations | Accepted with recommendations | They met the outcomes, so I guess this is how the unit evaluated success. I don’t really know how to evaluate what they included here. I believe that the review asks for a narrative here – not just the CIP results. |
| 11. Future Continuous Improvement Plan Tables | Accepted with Required Recommendations |  |  | Accepted with Required Recommendations | I’m not sure this was completed Outcomes listed. Measurement tools included. No target identified. The CIP is incomplete – you don’t have what the measures of the results nor the targets for the level of success in the CIP |

**Overall Decision: Accepted with Required Recommendations Fall 2024**

|  |  |  |  |
| --- | --- | --- | --- |
| Accepted Without Recommendations | Accepted With Recommendations | \_\_x\_Accepted with Required Recommendations | Revisit and Revise |

**General comments about the submission or rationale for the conclusion:**

The review can be salvaged by addressing the newest CIP and making it complete and adding narrative to the areas where it is lacking.

It can definitely be seen that the review was definitely done in 2 different chunks- by more than one person. The first few components look like they were taken from another report (maybe SACSCOC?) with the various links and overkill on visuals, some of which do not seem to support what the narrative says. The team noted the lack of narrative in several places and that the tables in appendices not always give the whole story. Did not answer all parts of questions in some components – how do you know unit communicates effectively, and expanding on how unit impacts student outcomes – instead addressed student satisfaction. Understanding how the unit evaluates success is missing and the future CIP is incomplete. Because of the importance of the CIP, the team recommends required changes in the CIP, and some in the group also recommended required changes in component 5 communications, while others accepted with recommendations. When writing a program review – remember your audience – that they do not know your program or the various acronyms so spell them out and use the narrative to explain – not just tables and data.