



2015-16 SERVICE UNIT REVIEW

SERVICE UNIT NAME: BUSINESS SERVICES

SERVICE UNIT REVIEW

The timeframe of unit review is five years, including the year of the review. Data being reviewed for any item should go back the previous four years, unless not available. Questions regarding forms, calendars & due dates should be addressed to the Kathleen Fenton (ext. 3737) or David Liska (ext. 3714) in the Institutional Effectiveness Office.

Are We Doing the Right Things?

This introductory section requires a description of unit/staff effort in service, outreach and engagement, and collaboration across the district/campus. It should be a comprehensive and functional depiction which sets the context of the service unit and should serve as the framework for the rest of the document. Topics presented in this self-definition explanation should appear later in the self-study in greater detail and explanation. This section should also begin to draw alignments with other processes, such as institutional initiatives.

This section is not meant to be merely a descriptive narrative of demographics. For example, reporting service figures for the past four years is useful only if they are illustrative of something that is impacting the unit (for example, growth in service demand, substantial increase or decrease in the number of students with unmet service needs; a disruptive technology impacting service delivery). This is also not meant to be a statement which establishes the level of quality of the unit or services delivered. It should be focused clearly on what is done in the name of the service unit.

1. WHAT DOES YOUR UNIT DO?

A. What is the service unit and its context? Provide evidence to make the case for each assertion made.

1. Payroll:

Payroll is responsible for accurately processing payroll in a timely manner each month. All employees receive a paycheck on a monthly basis for work performed through an ACH transaction to employees' designated bank account. In addition, payroll is responsible for making sure appropriate and accurate deductions for benefits and taxes are made from employees' gross pay, and paid to the proper



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authorities. Payroll coordinates many if not all transactions with HR. Changes in policies and procedures typically begin in HR and are coordinated with payroll. Barriers to effective service include ineffective IT support for some payroll functions.

2. Accounts Payable:

Accounts Payable processes all invoices to vendors and reimbursements to employees for the district in a timely and accurate manner. This department relies on AA's and others throughout the District to complete transactions, authorize payment, provide accurate expense and FOAP information. Turnover in staff has been a barrier to effective service. Difficulty in hiring/finding qualified replacements have contributed to ineffective service.

3. Accounting:

Accounting is responsible for the financial stability and integrity of the District. Investments, cash management, budgeting, financial reporting, etc. is managed by the accounting department. Monthly reports are sent out to organization managers to provide current budget status. Feedback is encouraged. Creating effective and informative reports for org managers has been difficult with Banner. The system does not provide useful reports with audit trails. We've had to work with IT to create our own management reports and are limited by IT time available to assist in helping with report creation. We've had difficulty staffing the IS manager position. It took almost a year to fill the position, then when the employee transferred to another position, finding a replacement took almost a year. Staff need training to stay current with excel and other software needed to perform their jobs effectively and efficiently.

4. Bursar:

Bursar's office is responsible for ensuring the proper tuition and fees are assessed to students, collecting tuition and fees from students, invoicing students and issuing refunds to student when applicable. In addition, they manage all third party billing and coordinate in-house collections and contracted collections services with 3rd party. Bursar personnel work cooperatively with ARO and financial aid to perform their functions effectively. Some processes that intertwine with other student services include grading, refunds, R2T4, payment deadlines, maintaining Banner tables, etc.

5. Bookstore:

The Bookstore is a vital service that sells textbooks and supplies to students. In addition, the bookstore serves District employees by stocking office supplies needed for their jobs. The Bookstore staff works with faculty and divisions on textbook adoptions. Turnover in staff has been a barrier to effective service. Difficulty in hiring/finding qualified replacements have contributed to ineffective service.

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Points to consider:

- Primary services provided by unit staff
- Primary products produced by unit staff
- Service across the campus by unit staff
- Outreach and engagement efforts by unit staff
- Areas where the unit is working in an isolated silo
- Identified barriers to effective service

B. Briefly summarize the topics that are addressed in this self-study: [identify your issues here; it can be a bullet list. Tell us briefly what you plan to show us in detail in the body of the report.]

- Demonstrate how the District manages public funds responsibly and with transparency;
- The business office functions are in compliance with state, local, federal and District policies, statutes and laws.
- The business office strives to be efficient and effective in processing transactions.
- Evaluate whether any services would be better accomplished by outsourcing.
- Evaluate how business services can provide more timely processing, improve customer service and documentation of procedures.
- Determine adequacy of space and equipment District-wide for business administrative services and the bookstores.

2. WHY WE DO THE THINGS WE DO: UNIT RELATIONSHIP TO THE COLLEGE MISSION & STRATEGIC PLAN

The question of “why we do the things we do?” is one which focuses on the mission of the unit, goals and priorities, and the role of the unit within its division and college. Describe unit-level actions that demonstrate the college mission, impart the core values or contribute to the strategic goals. Provide unit-specific evidence of actions that support the case that the unit and its staff contribute to fulfillment of the college mission, core values, and goals.



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Poor example: The unit supports the college mission to be student-centered in all that we do.

Better example: The unit supports the college mission to be student-centered by providing financial aid to qualifying students.

Best example: The units supports the college mission by providing financial aid for higher education to more than 8,000 students per term within 45 days from the date the application is received. (This is verifiable evidence of how the unit supports the college mission.)

A. Make a unit-specific case that shows the unit supports the college [mission](#).

1. Payroll:

The payroll function is essential to the mission of the District by paying all employees to do their jobs. [Three critical infrastructure elements of a business: People, process, products]

2. Accounts Payable:

Accounts Payable supports the District mission by ensuring all outstanding invoices are paid in a timely manner, thus enabling the District to pay vendors and reimburse employees accurately and in a timely manner.

3. Accounting supports the District mission by fulfilling reporting requirements and providing financial expertise to run the business end of the college. Accounting is responsible for ensuring proper internal controls are in place, thus ensuring transparency that the District is a good steward of the taxpayers' dollars. This area is responsible for making sure the District is in compliance with all state and federal regulatory statutes pertaining to the utilization of state and federal funds.

4. Bursar:

Bursar collects monies from and issues refunds to students. The Bursar's office is responsible for the integrity of the students' financial accounts which involves making sure the proper tuition and fee amounts are being charged, and the District is in compliance with state mandates for charging and refunding students.

5. Bookstore:

The Bookstore supports the mission by providing a vital service to our students which supports learning to help students obtain their intended education goals.



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B. Make a case that the unit and its staff contribute to fulfillment of the college [core values](#).

1. Payroll:

Payroll staff strive to keep up-to-date on payroll issues (tax laws, systems updates, payroll policies) and process payroll within stipulated guidelines thus fulfilling the college's core values of learning, integrity, dignity and respect.

2. Accounts Payable:

Accounts payable: staff process invoices with integrity. When necessary, they notify departments if additional information is needed in a respectful manner.

3. Accounting:

Accounting provides financial information District-wide, to students and the community. Accounting ensures transactions are recorded properly, that the district abides by all local, state, and federal laws and statutes. We're accountable to the state of Texas, Board of Trustees, students, employees, as well as the citizens of Collin County.

4. Bursar:

Bursar is accountable for funds collected from students, and other deposits made at the cashiers' offices on all campuses. They serve with integrity, and honesty as demonstrated by the annual audit findings.

5. Bookstore:

The District has a bookstore at CPC, SCC, PRC, and CYC that serves students and employees. The current system meets the needs of the District. The bookstore began offering students the option to rent textbooks instead of purchasing them. This has made it more affordable for students to obtain the necessary resources to be successful in the classroom.

C. Make a case that the unit supports the college [strategic plan](#).



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While not specifically identified in the Vision 2012-16 Strategic Plan, the administrative services division provides financial stability to the college as a whole enabling it to pursue its strategic plan.

3. WHY WE DO THE FUNCTIONS WE DO?

A. Make a case that the functions of the unit are necessary, should be modified, or should be deleted.

1. Payroll: Payroll department consists of one manager, an assistant manager, and two payroll coordinators. They function efficiently and effectively, coordinating payroll processing with HR. Five payrolls are run each month depending on the employee status. Two years ago the District implemented a web-based time keeping system, which eliminated the paper timesheet and leave forms. This provides better reporting capability, is easily accessible, and accurate. Two payroll people are very knowledgeable about the system and system maintenance. Leave balances are real time and up-to-date. We can improve our documentation and training for new employees. Since implementation in the Spring 2013 we've improved the new employee setup although there still may be room for improvement. Staying current on documentation is always a challenge.

2. Accounts Payable: Department consists of an AP supervisor and 4 accounts payable associates. An electronic travel system has been installed within the last year. This eliminates manual processing of 6-part paper travel forms. The system is being fine-tuned to meet the needs of the District. Ultimately, the new system should help expedite travel approvals, prepaids, and reimbursements to employees for travel expenses. In addition, the new system will eliminate the need for employees to pay for major travel expenses up-front and get reimbursed after travel. This will allow more employees to travel who otherwise might not have since they could not have afforded to pay for the travel upfront. There is significant training required for employees to utilize the travel system efficiently and effectively. Additionally, accounts payable is responsible for creating the documentation and users guide for employees. While the departments should experience efficiencies in processing, more reconciliations, systems maintenance, on-going training, and customer assistance will be required with the new travel package. Our efficiencies should be realized long term. We will have to evaluate if these tasks can be completed by existing personnel or if an additional person is needed. In addition, based on an efficiency audit conducted by Grant Thornton, a recommendation was made to hire an Accounts Payable manager to allow the manager to provide better oversight of the department, instead of being involved in the day-to-day minutiae.

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3. Accounting:

Accounting is an essential function of the District, providing district financial stability and accountability. The accounting processes are effective in as much as the college has received audits without findings and recommendations for the last three years. For budgeting, some colleges utilize pool budgeting. The District might consider the benefits of budgeting at the pool level instead of detail account level.

4. Bursar:

Bursar's staffing consists of cashiers at each campus and back office processing (refunds, third party billing, systems maintenance, collections) occurring at the administrative campus. These functions are essential to the controlled fiscal operations of the District, processing tuition and fee payments, and refunds to students. One cashier is dedicated to collection efforts for outstanding student balances. In-house collection procedures are thorough and substantial. After in-house efforts have been exhausted, outstanding receivables are turned over to a collection agency. The Bursars office recently set up a marketplace to enable divisions to collect webpayments as needed for functions with minimal setup required.

5. Bookstore:

Bookstore provides textbooks to students and office supplies to staff. Our internal bookstore continues to face competition from other brick and mortar and on-line stores. The bookstore has started communicating with faculty to make sure we're only adopting books the faculty will be requiring students to use. The bookstore is looking at other options to reduce bookstore costs including looking at electronic materials. Print packet is now print on demand directly through the printshop. The bookstore has an online presence (website) allowing on-line purchases and shipping to students. Many books can be virtually rented, as needed.

Points to consider:

- What is the origin of, and reason for, the function?
- Has the function evolved over time? Is it continuing to fulfill the original reason or has the reason also changed over time?
- What would happen if the unit no longer provided these functions?
- What unit functions require the most staff time?
- Are the functions that require the most time the same functions that add the biggest value for the college?
- What are the interdependencies with other unit functions and other units of the college? Is the unit duplicating any functions with other units? Is there a clear line of communication with other units involved in or supporting each of these functions?
- Does the unit or the college have alternate ways of providing any of these functions?
- Are the functions as automated as possible?

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Review two or three peer colleges for the way they accomplish these functions. Are there any lessons to be learned? Any new ideas for service improvement?

B. Make a case that each of the primary services should, or should not be, outsourced.

Payroll: Based on a survey by other Texas community colleges, 24 colleges responded to the survey, and of those responding no colleges outsource payroll. There's no evidence to support a contractor could process payroll more efficiently or effectively, for less money.

Investments: The results of a survey submitted to TACCBO members regarding outsourcing investment function suggest most, if not all community colleges do not contract out investment services. That function is performed in-house by all respondents (9).

A survey was sent to all Texas community colleges requesting information on all outsourced services and the benefits of such. Twenty-two colleges responded. Fourteen of the 21 respondents outsource the bookstore. The reasons provided include vendors in the specific field are more effective and have more expertise and buying power than the college. In addition, it was suggested that since the college did not have to carry inventory and employ personnel, there were cost savings. Most colleges (if not all) had negotiated guaranteed commissions. All colleges that outsourced those services were pleased with the arrangements. The District should consider the possibility of outsourcing to see if the model fits with our strategic goals.

4. WHY DO WE PRODUCE THE PRODUCTS WE DO?

The business office produces reports for organization managers, posts procedures on line for services offered.

A. Make a case that products of the unit are necessary.

Points to consider:

- What is the origin of, and reason for, each of the products?
- Have the products evolved over time? Are the products continuing to fulfill the original reason or has the reason also changed over time?

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- What would happen if the unit no longer produced these products?
- What unit products require the most staff time?
- Are these the same unit products that add the biggest value for the college?
- What are the product interdependencies with other unit functions and other units of the college?
- Does the unit or the college have alternate ways of producing any of these products?
- Are there competing products that do the same job? What are the advantages and disadvantages of the unit's product and the competition?

B. Make a case that the production of the products should, or should not be, outsourced.

See 3.b. above.

C. Unit Public Communications: List all Unit literature and other public communications (brochures, web presence, catalog entries, etc.) and provide the last date each was updated. All Unit public communications must be reviewed and updated no earlier than three months prior to the Unit review due date or provide a schedule to demonstrate that a review is periodically conducted to keep the contents current.

Table I-B: Unit Public Communication

Title	Type	Last Updated
Payroll	Payroll forms for address change, direct deposit, W-4, Supplemental Check request	Annually
	Payroll Changes Calendar	Annually
	Time Clock Plus guidelines and instructions	Continually assess procedures and update when needed.

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AP	AP guidelines are on CougarWeb under Business Administrative Services.	Continually assess procedures and update when needed.
	Forms needed for processing AP are on-line	Continually assess procedures and update when needed.
Accounting	Accounting provides financial transparency by providing the following on the home page of CougarWeb by clicking on Financial Transparency at the bottom of the page:	Continually assess procedures and update when needed.
	Budget CAFR Property Tax Check Registers Legislative Appropriations Request Investment Reports Utilities Consumption	Annually Annually Annually Monthly Bi-Annually Monthly, Quarterly Monthly
Bookstore	In the process of updating website for on-line orders	Continually assess procedures and

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	Faculty are able to do on-line adoptions	update when needed.
Cashiers	Tuition and Fees schedule; payment policies; refund policies; installment plan on-line	Continually assess procedures and update when needed.

5. INSTITUTIONAL DATA TO CONSIDER

A. Gather any relevant, available information for the unit. Possibilities include:

1. Student Satisfaction Surveys

- a) IE Student Service Unit Satisfaction Survey 2010 and 2012. 2014 student survey data will be available on a unit basis by December 2014.
- b) Noel-Levitz Student Satisfaction Surveys

2. IE Faculty/Staff Service Unit Satisfaction Surveys 2010, 2012, and 2014.

See below for survey results. Results for overall satisfaction appear consistent from one year to the next.

Summarized data – per faculty/staff surveys (from institutional effectiveness website)

Overall Satisfaction (Mean)			
	2011	2012	2014
Audit, Accounting, Payroll	4.08	4.08	4.06
Financial	4.28	4.38	4.39

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Reporting/Bursar

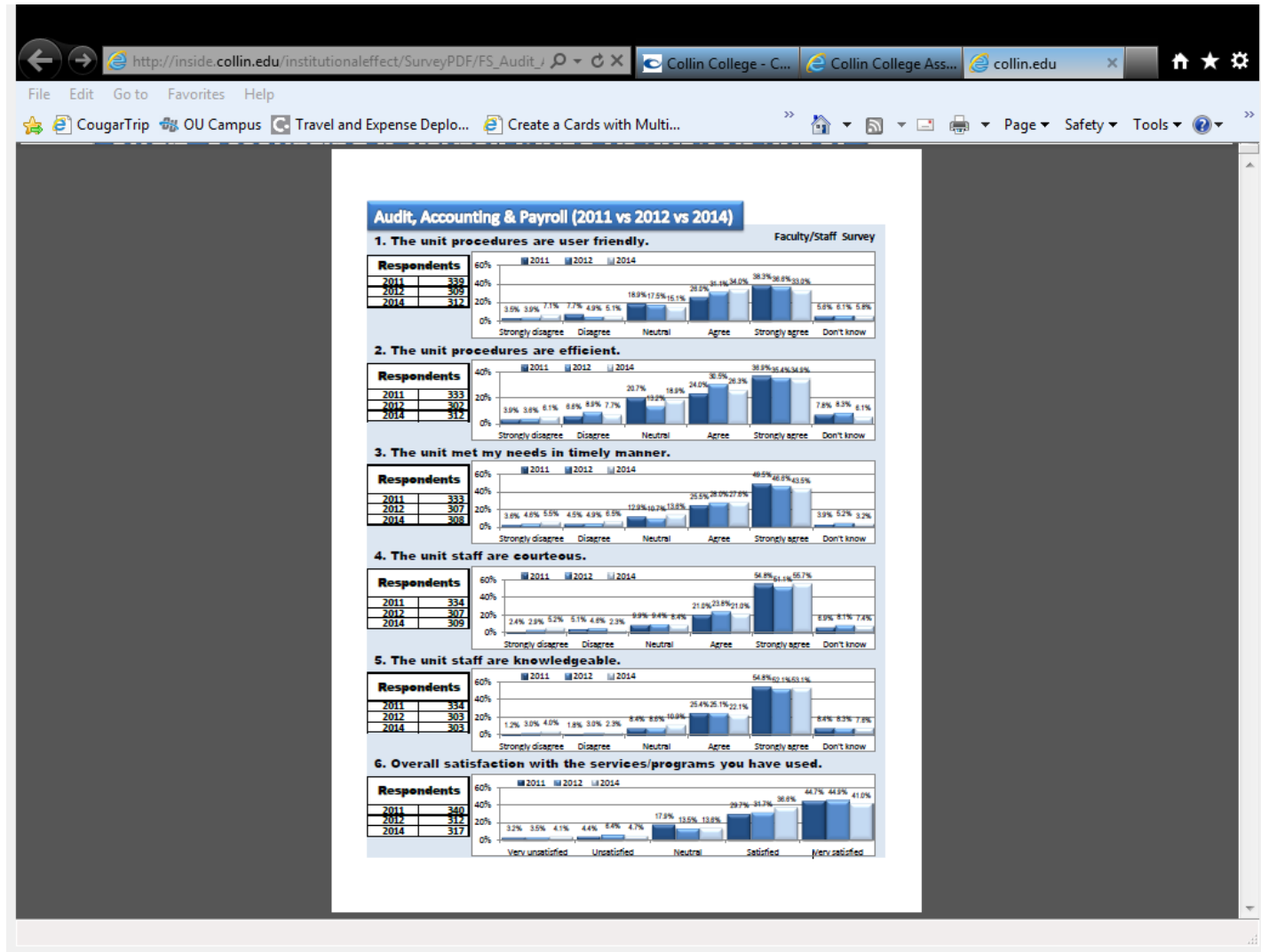
3. IPEDS Data

4. Unit-level Data, if available

- a) Audit Reports-District continues to receive unqualified opinions on annual audit from external auditors.
- b) Periodic Unit Reports for supervisory chain
- c) Point-of-Service Unit Surveys

Based on a review of the survey, audit, accounting, and payroll scored relatively strongly with overall satisfaction either satisfied or very satisfied at 36.6% and 41% respectively. % have held steady over the last several years.

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- d) Number of delivered service units by function
- e) Cycle or response time for service or product delivery completion
- f) Number and types of complaints



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The most recent survey was taken in Spring 2014. Other surveys were done in Spring 2011,

It was noted in the 2011 survey comments, many suggestions were made to improve the time-sheet process. We implemented web-based timesheets in 2013.

A common theme in the survey comments for most of the business office functions mentioned inadequate communications about procedures and lack of notification for procedure changes. Other complaints include:

slow response time to respond to questions

time clock plus is not user friendly

slow processing time for reimbursements

employees do not know who to direct questions to for problems

procedures for ap/travel are cumbersome, inflexible, difficult to navigate, inconsistent, confusing

g) Time to resolution of complaints by type

Each functional area handles inquiries, questions, and complaints on a case by case basis. Resolution of problems in a timely manner is a priority. No formal accounting of complaints is maintained. It was noted in the surveys that resolution of problems takes too long.

Also, business office staff should be more helpful/friendlier

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6. UNIT RESOURCES WE HAVE AND THEIR STATUS

- A. Partnerships Resources: List any unit partnerships with university/business and industry partnerships and briefly describe them. If a contract is involved, indicate its duration.

Table 6-A: Partnership Resources.

University/Business & Industry	Partnership type	Contract, if any	Benefits to unit and/or college
N/A			

- B. Employee Resources: List Unit employees (full- and part-time), their role, credentials, and professional development activity during the last four years.

Table 6-B: Employee Resources

Employee Name	Role in Unit	Credentials	Professional Development since last Unit Review
Payroll	Mgr, Asst Mgr, 2 associate payroll staff	Bachelors	Ellucian training, TCP conference; TCC, SETA conference, Banner training
Grants Accounting	Mgr, Acct	Bachelors/Business, Accounting	Federal Grants Mgmt, OMB circulars
Accounting	5 accountants	BA-accounting	Investment, Excel, Blackbaud conference, Banner training,
AVP	2 AVP	MPA-accounting; CPA	Investment training, business officers conferences, Ellucian conference; federal financial aid conference; CBMI Conference-Intensive course study in business and financial mgmt. for college administrators, TACVPO-veteran's

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			conference
Bookstore	Manager, staff		MBS training, National Assoc of College Stores Conference
Bursar	Manager, staff		Bursar conference (TX BUCS), COMTEC Touchnet Training, SETA; Collections summit
Randy Novotny	Accounts Payable Supervisor		

C. Facilities Resources: List/describe any facility resources dedicated to the unit’s use.

Table 6-C: Facilities Resources

Room/Office Location and Designation	Size	Type	Special Characteristics (i.e. permanent like ventilator hood)	Meets current needs: Y or N	Will meet needs for next five years: Y or N	Describe additional needs for any N” answer in columns 5 or 6.
CHEC				Yes, but not future growth	We are essentially built out. There is no additional space in our area for growth	We do not have any space to grow. We will need to remodel office or repurpose some rooms to meet office space needs for accounting, accounts payable, payroll, and bursar. Space needs for what functions? Identify what function(s) is impeded and how by space needs in the appropriate function description of effectiveness & efficiency.

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Cashier offices on all campuses				Yes	No	<p>Space is adequate but configuration is not optimum. More efficient space is highly recommended. Each cashier office needs line-of-site access to cashier windows from every work station. In addition, each cashier window station needs, as a minimum, room for computer, dual monitors (simultaneous Banner and TouchNet access are required for job performance and excellent customer service), required TouchNet hardware, printer, telephone, and actual work space for the employee. In an ideal world, cashier window stations would have room for two computers, one for secure TouchNet payment transactions restricted from any other web activity and one computer for Banner and other work required access as well as a scanner to facilitate a paperless office. Stations need to be ergonomically configured for cashier shifts of 8-12 hours while providing privacy for both students and staff when discussing FERPA restricted information. Additionally, a new model for 'one stop' Admissions, Financial Aid, Bursar activities is being successfully implemented at many higher ed institutions. Should Collin wish to explore that model, then work space for all three areas would be directly impacted.</p>
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Cashier-PRC				Yes	No	Any expansion of office hours would most certainly require changes at PRC Cashier office. Currently have two full time staff, and extended office hours would likely result in the addition of a part time position to ensure adequate office coverage. Current office location does not provide adequate office space/configuration for a third work station. Any additional full service campus additions would also require associated cashier office space and staffing.
Bookstore-SCC				No	No	Remodel of cashier area and offices. Offices need to see the sales floor to prevent theft or to see students who need served. SCC is not designed to serve future students. The space is not flexible or tech ready. Lower counters are needed at SCC. The counters at SCC are not at ADA standards, making it hard for some of our customers to purchase goods.
Bookstore-PRC				No	No	Need layout reorganization for checkout during rush. PRC is not designed to serve future students. The space is not flexible or tech ready. Loading docks at PRC is needed. The counters PRC are not at ADA standards, making it hard for some of our customers to purchase goods and more shelving is needed.

D. Equipment and Supplies: List all equipment valued at \$5,000 or more each

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Neither Organizations 211205 (financial services) and 211505 (controller) have equipment at \$5,000 or greater. All assets are < \$5,000 and include computers and furniture and equipment.

Table 6-D: Equipment and Supplies

Current Equipment Item or Budget Amount	Meets current needs: Y or N	Will meet needs for next five years: Y or N	For any no in columns 2 or 3, justify needed equipment or budget change
Business Office-CHEC	N		All business office staff need bigger monitors. Update: We were able to purchase larger monitors for all business office state in 2015.
Bookstore-CPC computers, printers, monitors	No		Need new monitors, printers and computers; current equipment is outdated.
Bookstore-PRC computers, printers, monitors; shelving and layout	No		Need new monitors, printers and computers; current equipment is outdated. Need shelving.
Bookstore-SCC computers, printers, monitors;	No		Need new monitors, printers and computers; current equipment is outdated.
Bookstore-van, vending machines, scanners	Yes		

E. Financial Resources: List all financial resources in the table below.

Table 6-E: Financial Resources

Source of Funds (i.e. college budget,	Meets current	Will meet needs for next five	For any no in columns 2 or 3, explain why	For any no in columns 2 or 3, identify expected source of additional funds
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grant, etc.)	needs: Y or N	years: Y or N		
Current unrestricted fund	Yes	Yes		
Grant funded position for DOL accountant	Yes	NA	Grant ends in 2015-16.	

7. UNIT PLANNING

A. Use the Institutional and Unit Data and Resources to respond to the following questions.

1. Strengths: What strengths can this unit build on in the near future?

Payroll: We implemented a new web-based time keeping system. This provides better reporting capability, is easily accessible, and accurate. Leave balances are real time and up-to-date. We can improve our documentation and training for new employees. Since implementation in the Spring 2013 we've improved the new employee setup although there still may be room for improvement. Staying current on documentation is always a challenge. Two payroll people are very knowledgeable about the system and system maintenance.

AP: We're implementing an electronic travel and expense package Concur which should improve the processing for reimbursement. This will eliminate the 6-part paper form, reduce paperwork, expedite the approval, improve reporting, provide better data on travel, and ultimately reduce travel expenses (through discounts from travel partners).

Bookstore: Implemented new software (MBS) since the existing system (Budgetext) was no longer being supported.

Weaknesses: What unit weaknesses must be addressed in the near future? Need to provide better training to our users.

Need to improve documentation for all processes, and notification to users when procedures change.

Need to maintain CougarWeb for business administrative services so all information is relevant and current.

Need to improve reports sent to financial users; additionally, need to provide a user's guide to finance and other business services.

Need to create electronic processing for all forms including inventory request, check requests, staff meeting, contract labor, etc.

Need to evaluate processes to determine if efficiencies could be realized.

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All functions must have proper documentation. Each position should be cross-trained.

What are the perceived consequences if the weakness(es) is(are) not addressed?

If employees are not properly cross-trained, delays would occur in providing outcome (payroll, reimbursement, etc.) when turnover happens.

Inadequate documentation of procedures for our customers results in delayed processing, lack of confidence in the process, frustration by customers.

2. Threats and Opportunities: Describe any forecasted trends or changes in the areas listed below that may impact the way this unit functions five to ten years from now:

- Legal
- Political
- Demographic
- Educational
- Technological
- Economic
- Environmental
- Social
- Cultural

Master plan is currently being developed which may address some of the trends noted above.

- Evaluate chart of accounts in lieu of additional campus expansions.
- Funding for additional campuses required as a result population growth. (Bond election)

- B. Complete the next Continuous Improvement Plan form that follows. This plan will be implemented the academic year following this Unit Review.
- C. Use the available data and any Unit Review Committee conclusions to justify/support the new action plan.
- D. Summarize expectations and general plans for the next five years. Under ideal circumstances, how might this unit move the college forward in terms of effectiveness, efficiency or customer satisfaction?



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Name of Administrative or Educational Unit: _____ Business Administrative Services _____

Contact name: Julie Bradley, Barbara Jindra **Contact email:** jbradley; bjindra **Contact phone:** x3821, x3732 **Office Location:** CHEC 316, 31 _____

Unit Mission:

To provide financial stability for the District with proper financial management, internal controls, excellent training, sound and documented procedures. As stewards of the taxpayer dollars we strive to provide transparency, spend funds appropriately, record all transactions according to generally accepted accounting principles, follow all policies from Board of Trustees, as well as abide by local, state, and federal laws and statutes.

Key Institutional Outcome Indicators: Overall Satisfaction, Completers, Efficiency, Effectiveness

PART I: These elements might not change from year to year.

A. Program Outcomes(s) Results expected in this department/program	B. Measure(s) The instrument or process used to measure results	C. Target(s) The level of success expected
Implement software and technology to improve efficiencies.	Improved efficiencies in processing turnaround time, reduced costs for travel expenses, and potential reduction in personnel. Improved reporting capabilities resulting in better budgeting decisions.	A. 100% of expenses documented & identified B. 100% of unit participation
Outcome suggestion for above: 1. Automate all manual processes that are conducive to automation.		
2. Improve user satisfaction with Business Service processes	Comment section in service unit satisfaction survey.	Reduction in negative comments regarding response time.

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PART II:

From Part I

A. Outcomes(s) Results expected in this department/program	D. Action Plan Years 5 & 2 Based on analysis of previous assessment, create an action plan and include it here in the row of the outcomes(s) it addresses.	E. Implement Action Plan Years 1 & 3 Implement the action plan and collect data	F. Data Results Summary Years 2 & 4 Summarize the data collected	G. Findings Years 2 & 4 What does data say about outcome?
1. Implement software and technology to improve efficiencies.	2014: Automate all manual processes that are conducive to automation: <ul style="list-style-type: none"> • Implement Concur Travel and Expense. • Implement Time Clock Plus 2016: Target remaining manual forms for automated processing through SciQuest including check requests, staff meetings, contract labor, etc.	Implement plan and collect data.	2013-14: Average manual processing time for travel was 2-3 weeks. 2015: Concur travel processing can be completed within 1 week.	2015; Automation is improving efficiencies and reduced processing time by 2/3. Reevaluate remaining processes within Concur to improve processing.
Improve user satisfaction with Business Service processes		Implement and collect raw data.	2013-14 Negative comments about response time.	Automating should reduce response time.



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A. Outcomes(s) Results expected in this department/program	D. Action Plan Years 5 & 2 Based on analysis of previous assessment, create an action plan and include it here in the row of the outcomes(s) it addresses.	E. Implement Action Plan Years 1 & 3 Implement the action plan and collect data	F. Data Results Summary Years 2 & 4 Summarize the data collected	G. Findings Years 2 & 4 What does data say about outcome?

UNIT REVIEW REPORT PATHWAY:

Completed Unit Review Reports will be evaluated by the appropriate deans and Unit Review Steering Committees. Following approval by the Steering Committee, Unit Review Reports will be evaluated by the Leadership Team who will approve the reports for posting on the intranet. At any point prior to Intranet posting, reports may be sent back for additional development.