

Administrative Services Program Review 2017/18 UPDATE

Business Services

**Created on: 07/28/2017 11:14:00 AM PST
Last Modified: 12/07/2017 02:03:36 PM PST**

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General Information (Administrative Services Program Review 2017/18 UPDATE)

2017/18 Administrative Services Program Review UPDATE

PROGRAM REVIEW DATA AND RESOURCES

Participants (REQUIRED)

Rachelle Agatha

Patty Garcia

Updates (REQUIRED)

During 2016-2017, SDCCD is still struggling with the PeopleSoft ERP Finance module which went live July 1, 2015. The HCM module went live January 1, 2016. Campus Solutions has been delayed until 2018. This implementation has impacted district resources. We are facing and working through many challenges with the new system including changes in business practices and processes, insufficient training materials and training for district employees, reduced reporting and analytical tools for staff and employees, and a huge learning curve district-wide.

During 16-17, SDCCD implemented the Hyperion Budget System which negatively impacted the budget process both in timing and budget outputs. The system was supposed to seamlessly integrate with PeopleSoft, but has not proven to be a benefit to the district in any fashion.

Outcomes and Assessment (REQUIRED)

Form: Outcomes and Assessment 2017/18 - Administrative Unit Questions (See appendix)

IE Data Analysis (REQUIRED)

Form: IE Data Analysis - Program Review 2017/18 - Student Service/Administrative Unit Questions (See appendix)

Program Goals

Business Services Goal Set 2014-2015

Outcome

Outcome	Mapping
Manage and Support College Resources Goal 1: Manage and support the College's resources by	CA- Mesa College Strategic Directions and Goals: Strategic Goal 4.4, Strategic Goal 6.1

implementing and utilizing innovative, efficient and technologically advanced processes and procedures.
Link to College Strategic Goals 4.4 and 6.1

Fiscal Accountability
Goal 2: Help to ensure fiscal accountability and compliance by adhering to strong internal controls, while providing guidance on information, analytical reports, budget tools, and appropriate training to College management and fiscal users.
Link to College Strategic Goal 6.1

CA- Mesa College Strategic Directions and Goals: Strategic Goal 6.1

Financial Transactions
Goal 3: Process financial transactions and complete required reporting timely and accurately in collaboration with the District, students, faculty, staff and other outside entities.

CA- Mesa College Strategic Directions and Goals: Strategic Goal 6.1

Objectives and Plans

Actions

Business Services Goal Set 2014-2015

Outcome

Goal: Manage and Support College Resources

Goal 1: Manage and support the College's resources by implementing and utilizing innovative, efficient and technologically advanced processes and procedures.
Link to College Strategic Goals 4.4 and 6.1

▼ Action: Streamline and innovate business practices

Describe the actions

Objective 1: Streamline and innovate business

needed to achieve this objective :

practices while minimizing manual and paper processes to maximize efficiency therefore reducing resource waste.

Link to Department goal 1

Who will be responsible for overseeing the completion of this objective:

Erica Garcia and Rachelle Agatha

Provide a timeline for the actions:

AUO #1: Demonstrate improved travel reporting and accounting in conjunction with the new PeopleSoft system implementation.
Link to Objective: 1

Describe the assessment plan you will use to know if the objective was achieved and effective:

AUO #1 Measure: PeopleSoft Finance module implementation go live date of July 1, 2015. This first phase will include document imaging and workflow eliminating paper processes. An improved travel reporting and tracking will be implemented at this time. Internal processes will be assessed and modified to ensure efficiency, accuracy and compliance with new system and District policy.
Measure based PeopleSoft timeline, fit/gap analysis, status of July 1, 2015 implementation and travel requests processed in new system starting July 1, 2015.

List resources needed achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):

Staffing time and supplies

Goal: Fiscal Accountability

Goal 2: Help to ensure fiscal accountability and compliance by adhering to strong internal controls, while providing guidance on information, analytical reports, budget tools, and appropriate training to College management and fiscal users.
Link to College Strategic Goal 6.1

▼ **Action:** Budget and Financial Reporting Training

Describe the actions needed to achieve this objective :	Objective 2: Provide budget and financial reporting training to College management. Link to Department goal 2.
Who will be responsible for overseeing the completion of this objective:	Rachelle Agatha & Erica Garcia
Provide a timeline for the actions:	AUO #2: Assist with the development of budget and financial training programs for College management. Link to Objective: 2
Describe the assessment plan you will use to know if the objective was achieved and effective:	AUO #2 Measure: In conjunction with the PeopleSoft Finance implementation timing, begin to develop budget and financial reporting training for College Management. Measure: ERP project plan timeline milestones.
List resources needed achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):	Staffing and supplies

▼ **Action:** High Quality Business Services

Describe the actions needed to achieve this objective :

Objective 4: Provide high-quality business services in support of the college-wide mission. Link to Department goal 2

Who will be responsible for overseeing the completion of this objective:

Rachelle Agatha & Erica Garcia

Provide a timeline for the actions:

AUO #4: Campus clients will receive high-quality business services in support of the college-wide mission. Link to Objective: 4

Describe the assessment plan you will use to know if the objective was achieved and effective:

AUO #4 Measure: Business services will refine and improve website access to important business forms and information.
Measure: Results of business services department surveys and google analytic results.

List resources needed achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):

Supplies and Staffing

Goal: Financial Transactions

Goal 3: Process financial transactions and complete required reporting timely and

accurately in collaboration with the District, students, faculty, staff and other outside entities.

▼ **Action:** Maximize Transaction Efficiency

Describe the actions needed to achieve this objective :

Objective 3: Improve the chargeback process maximizing efficiency and by utilizing the new PeopleSoft system and by redefining internal processes.

Link to Department goal 3

Who will be responsible for overseeing the completion of this objective:

Erica Garcia & Rachelle Agatha

Provide a timeline for the actions:

AUO #3: Refine chargeback process to eliminate manual processing and improve accuracy. Link to Objective: 2

Describe the assessment plan you will use to know if the objective was achieved and effective:

AUO #3 Measure: In conjunction with the PeopleSoft Finance implementation timing, begin to develop chargeback process improvement plan.
Measure: ERP project plan timeline milestones.

List resources needed achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):

Staffing and supplies

Goals Status Report (REQUIRED)

Action Statuses

Business Services Goal Set 2014-2015

Outcome

Goal: Manage and Support College Resources

Goal 1: Manage and support the College’s resources by implementing and utilizing innovative, efficient and technologically advanced processes and procedures.
Link to College Strategic Goals 4.4 and 6.1

▼ Action: Streamline and innovate business practices

Describe the actions needed to achieve this objective :

Objective 1: Streamline and innovate business practices while minimizing manual and paper processes to maximize efficiency therefore reducing resource waste.
Link to Department goal 1

Who will be responsible for overseeing the completion of this objective:

Erica Garcia and Rachelle Agatha

Provide a timeline for the actions:

AUO #1: Demonstrate improved travel reporting and accounting in conjunction with the new PeopleSoft system implementation.
Link to Objective: 1

Describe the assessment plan you will use to know if the objective was achieved and effective:

AUO #1 Measure: PeopleSoft Finance module implementation go live date of July 1, 2015. This first phase will include document imaging and workflow eliminating paper processes. An improved travel reporting and tracking will be implemented at this time. Internal processes will be assessed and modified to ensure efficiency, accuracy and compliance with new system and District policy.
Measure based PeopleSoft timeline, fit/gap

analysis, status of July 1, 2015 implementation and travel requests processed in new system starting July 1, 2015.

List resources needed achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):

Staffing time and supplies

Status for Streamline and innovate business practices

Current Status: In Progress

If the Current Status was marked Completed, what was the impact of the completed objective on your program:

If the Current Status was not marked Completed, what are the implications and next steps:

The ERP system has hindered this goal as noted in the update

Goal: Fiscal Accountability

Goal 2: Help to ensure fiscal accountability and compliance by adhering to strong internal controls, while providing guidance on information, analytical reports, budget tools, and appropriate training to College management and fiscal users.
Link to College Strategic Goal 6.1

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the impact of the completed objective on your program:

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▼ **Action:** High Quality Business Services

Describe the actions needed to achieve this objective :

Objective 4: Provide high-quality business services in support of the college-wide mission. Link to Department goal 2

Who will be responsible for overseeing the completion of this objective:

Rachelle Agatha & Erica Garcia

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Measure: Results of business services department surveys and google analytic results.

List resources needed achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities,

Supplies and Staffing

Classified Staff, Faculty,
Other):

Status for High Quality Business Services

Current Status: In Progress

If the Current Status
was marked
Completed, what was
the impact of the
completed objective on
your program:

If the Current Status
was not marked
Completed, what are
the implications and
next steps:

The ERP system has hindered this goal as noted in
the update

Goal: Financial Transactions

Goal 3: Process financial transactions and complete required reporting timely and accurately in collaboration with the District, students, faculty, staff and other outside entities.

▼ Action: Maximize Transaction Efficiency

Describe the actions
needed to achieve this
objective :

Objective 3: Improve the chargeback process
maximizing efficiency and by utilizing the new
PeopleSoft system and by redefining internal
processes.
Link to Department goal 3

Who will be responsible for overseeing the completion of this objective:

Erica Garcia & Rachelle Agatha

Provide a timeline for the actions:

AUO #3: Refine chargeback process to eliminate manual processing and improve accuracy. Link to Objective: 2

Describe the assessment plan you will use to know if the objective was achieved and effective:

AUO #3 Measure: In conjunction with the PeopleSoft Finance implementation timing, begin to develop chargeback process improvement plan.
Measure: ERP project plan timeline milestones.

List resources needed achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):

Staffing and supplies

Status for Maximize Transaction Efficiency

Current Status:

Completed

If the Current Status was marked Completed, what was the impact of the completed objective on your program:

This goal cannot be implemented as planned based on the ERP and issues at hand. Therefore goal is not applicable at this time

If the Current Status was not marked Completed, what are the implications and

next steps:

Closing the loop on prior year resource allocations (REQUIRED)

Business Services requested a Sr. Accounting Technician during the integrated planning cycle in 16-17. The position was ranked high, and through a re-organziation the position has been filled.

Request Forms

 **BARC & Facilities Requests**

 **Classified Staff Requests**

 **Faculty Position Request 1**

 **Faculty Position Request 2**

 **Faculty Position Request 3**