SAN DIEGO MESA COLLEGE

Program Review

Summary and Reflections with Unit Goals, Action Plans, and Updates

Administrative Services - Business Services

Executive Summary

Describe the successes and challenges your unit has faced since the last comprehensive review.
Business Services was successful by being able to provide full service to campus while working remotely during the COVID pandemic (2.5-3 years).
The department is effectively providing more 1 on 1 or group trainings on Business Services and Purchasing procedures. This helps the campus better prepare for upcoming purchases and better manage their budgets.
Dedicated email accounts have been created for travel and reimbursement requests. Having the separate email accounts have provided better organization for the department staff, and allow the department to focus on and process requests more efficiently.
Below are the challenges the department faces:
-Understaffed for the past 8 years. Department is in need of a supervisor/manger and an additional Administrative Technician in order to continue to provide effective and superior customer service.
-Mesa has acquired additional (more funds/grants), and with limited staffing able to manage. Grants are more complex due to regulations and additional reporting
-Challenged by District's continuous lack of communication when it comes to policy and procedure changes and enforcement.
-District is delegating more tasks to the campuses that they once managed.
-With new procedures in place there is push back from campus to follow process.
-People Soft continuously glitchy, reports are not accurate, and has created more manual work

If applicable, describe any major curricular or service changes your unit has engaged in and the impact of those changes since the last comprehensive review.
N/A

If applicable, describe the impact of any new resources (human, fiscal, etc) on the unit and/or action plan implementation.
N/A

If you assess OUTCOMES, please confirm that the outcomes have been reviewed for accuracy. If you do not assess Outcomes, skip this question.

Related Documents for Charts and Graphs

Executive Summary Complete
Yes

Data Reflection

Trends observed in program/service area's data.
Trend 1: There is an increase of outreach to and from the department for training, providing updates on policy and procedure, assistance with managing additional funding, and accessing People Soft. The department continuously receives requests to provide one on one trainings for new and current employees. Also, the department has been asked to participate on more committees and attend more meetings to provide guidance on budget and policy and procedure. On an average employee spends up to 3-5 hours a month providing one on one trainings. Employees spend in the fall semester average 4 hours a month and in spring 8 hours a month on various committees to provide fiscal guidance. In order to provide departmental information the Business Services webpage has been updated with current forms and information sheets regarding requisition and travel process. This alings with AUO 3 (provide on-ling business information access to the college). The additional outreach, participation and trainings aligns with AUO 2 (improve open door policy to increase customer service) but can be challenging due to the staff shortage.

Trend 2: Every year District Finance and Business Services has delegated more tasks to the campus. This includes additional paperwork, data input into People Soft, and monitoring of funds. This increases the workload for the department staff and

director and takes time away from completing existing tasks. These additions also increase the workload of the entire campus since the District requires more paperwork from those requesting purchase orders, travel, and payment for student aid.

Describe any equity gaps in the data. Are there differences and/or patterns observed by demographics (e.g.race/ethnicity, gender, age, etc.)
N/A

Related Documents for Charts and Graphs

Describe the discussion(s) that took place about the unit's learning outcomes assessment data.
N/A

Data Reflection Complete
Yes

Practice Reflection

Describe current practices your program/service area has engaged in that you believe impact the above data trends and equity gaps.
Currently the department works overtime during peek seasons to complete the normal and additional workload given by the District and the campus demands.

What other factors (internal or external) might also impact the above data trends and equity gaps?
-additional grant funding increases the workload due to managing, monitoring, processing expenses of funds.
-there continues to be more faculty and staff hired at Mesa, therefore the department is requested to provide more training and support to new employees
-the department has been short staffed for the past 7 years. Due to the shortage staff the workload is increased for each employee

Related Documents for Charts and Graphs

Practice Reflection Complete
Yes

Mid-Cycle Updates

YEAR 2 Updates (2023 - 2024)
Provide any edits or updates to the prompts originally documented in the Executive Summary section for Year 2.
Business Services is still understaffed but continues to provide support to the campus with one NANC and one Work Study employee that were temporarily added to the team. The department is providing regular campus trainings related to purchasing and travel. The trainings had high attendance, and attendees have provided feedback on what they learned and additional information they need.

Provide any edits or updates to the prompts originally documented in the Data Reflection section for Year 2.
No updates.

Review Outcomes Report. Review the unit's outcomes assessment process for 2022 - 2023. Discuss connections to unit goals/action plans/resource requests.
No updates.

Provide any edits or updates to the prompts originally documented in the Practice Reflection section for Year 2.
The department continues to work overtime during peak season even with the additional part time employees.

Summary and Reflection

YEAR 3 Updates (2024 - 2025)

Provide any edits or updates to the prompts originally documented in the Executive Summary section for Year 3.

Provide any edits or updates to the prompts originally documented in the Data Reflection section for Year 3.

Review Outcomes Report. Review the unit's outcomes assessment process for 2023 - 2024. Discuss connections to unit goals/action plans/resource requests.

Provide any edits or updates to the prompts originally documented in the Practice Reflection section for Year 3.

YEAR 4 Updates (2025 - 2026)

Provide any edits or updates to the prompts originally documented in the Executive Summary section for Year 4.

Provide any edits or updates to the prompts originally documented in the Data Reflection section for Year 4.

Review Outcomes Report. Review the unit's outcomes assessment process for 2024 - 2025. Discuss connections to unit goals/action plans/resource requests.

Provide any edits or updates to the prompts originally documented in the Practice Reflection section for Year 4.

YEAR 5 Updates (2026 - 2027)

Provide any edits or updates to the prompts originally documented in the Executive Summary section for Year 5.

Provide any edits or updates to the prompts originally documented in the Data Reflection section for Year 5.

Review Outcomes Report. Review the unit's outcomes assessment process for 2025 - 2026. Discuss connections to unit goals/action plans/resource requests.

Provide any edits or updates to the prompts originally documented in the Practice Reflection section for Year 5.

Unit Goals, Action Plans, and Updates

Hiring

Unit Goal: Hire/add position a Senior Accounting Technician and Business Office Support Supervisor

Goal Status: Active

Beginning Year: 2025 - 2026

Projected Completion Year: 2027 - 2028

Mapping

Mesa College Strategic Plan: Roadmap to Mesa2030:

- **Stewardship - Objective 5:** Increase campus understanding, communication of and transparency in budget and resource allocation (✓)

Action Plans	Updates
Action Plan Status: Active **Action Plan:** Goal 1 Action Plan List 1.Continue to apply for additional position via CHP; 2. Continue to strategize with team on how to manage workload **Action Plan Cycle:** 2025 - 2026	**Submission Date**: 01/21/2026 **Action Plan Update**: The department's requests for an Administrative Technician and Business Services Supervisor were not approved through CHP. Administration also indicated that there is currently insufficient funding to support these positions, and that funding may not be available in future years. In FY25, the director retired and the long-term Senior Accounting Technician transferred to another position. Although the department has filled all vacancies, current staffing levels remain inadequate to fully meet operational demands. The department will continue to request these positions through the CHP process, utilize overtime as needed to manage workload, and seek temporary assistance from other staff when available, in order to minimize instructional impacts and ensure compliance with district deadlines and policies. **Update Year**: 2025 - 2026 **Action Plan Progress**: Barriers Encountered

Campus Training

Unit Goal: Provide more training re policy, procedure and budget.

Goal Status: Active

Beginning Year: 2022 - 2023

Projected Completion Year: 2025 - 2026

Mapping

Unit Goals, Action Plans, and Updates

Mesa College Strategic Plan: Roadmap to Mesa2030:

- **Stewardship - Objective 5:** Increase campus understanding, communication of and transparency in budget and resource allocation (✓)

Action Plans	Updates
Action Plan Status: Active **Action Plan:** Goal 2 Action Plan List 1. Send out survey to ask campus what areas they need training on; 2. Coordinate with NFI and NCI to provide trainings on Business Services policy and procedure for new hires; 3. Coordinate with departments at the beginning of each semester to reach out to provide trainings at school or department meetings **Action Plan Cycle:** 2022 - 2023	**Submission Date**: 11/30/2023 **Action Plan Update**: Business Services has coordinated with DIstrict Purchasing to have a training for the campus regarding SDCCD's policy and procedures for purchasing and budget. We will continue to work with District and other departments to provide training for the campus. The department has started to do several trainings/workshops on Purchasing and Travel processes throughout the semester. These are separate from any collaboration with District. **Update Year**: 2023 - 2024 **Action Plan Progress**: On Track

Business Services website

Unit Goal: Improve Business Services website

Goal Status: Active

Beginning Year: 2022 - 2023

Projected Completion Year: 2023 - 2024

Mapping

Mesa College Strategic Plan: Roadmap to Mesa2030:

- **Stewardship - Objective 5:** Increase campus understanding, communication of and transparency in budget and resource allocation (✓)

Action Plans	Updates
Action Plan Status: Active	**Submission Date**: 12/03/2024

Unit Goals, Action Plans, and Updates

Action Plans	Updates
Action Plan: Goal 3 Action Plan List: 1. send out survey to ask what is needed on website 2. send out ongoing notifications of when website is updated **Action Plan Cycle:** 2022 - 2023	**Action Plan Update**: The Business Services website has been updated with Purchasing and Travel processes, required documents/forms, and training information. **Update Year**: 2023 - 2024 **Action Plan Progress**: On Track