SAN DIEGO MESA COLLEGE

Program Review

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

Administrative Services - Student Accounting

Executive Summary

Describe the successes and challenges your unit has faced since the last comprehensive review.
One of the successes that Student Accounting Office has faced since the last comprehensive review was the batch online credit card refunds that are processed weekly. This success has sped up our online credit card refund process compared to our prior manual one-by-one refund process between two systems (PeopleSoft and Touchnet) that took each staff at least 15-30 minutes to process a single refund.

Another success was the launch of the PRONTO bus passes. In the past, students would get a sticker on their Student ID cards. Now, students can use a virtual card when they download the PRONTO app. They don't have to worry about losing their physical card and it's reloadable whenever the pass expires. Currently, students are eligible for a free HEERF semester/monthly bus pass if they apply and are eligible through Basic Needs/STAND.

Yet another success our Student Accounting department was reclassifying our Senior Account Clerk to an Accounting Technician. The type of work has changed with our new PeopleSoft Campus Solutions. It requires more analytical and technical work. Handling the ever-increasing and demanding workload of the new integrated student system requires the staff to be classified as technicians.

Despite some successes, there are some challenges that our Student Accounting Office has faced since the last comprehensive review. One of the challenges is the staffing/manpower in the office. There are currently many vacant positions. With the vacant posts, it created some Acting positions. Having acting positions between different departments have significantly impacted the office's workload. The reason is that the position is temporary and still determining how long it would last. It causes a domino effect within the District, leaving some departments with less staffing, requiring the department to hire temporary NANCE workers.

Another challenge is the credit card payment issues for parking permits online purchase as well as at our Accounting windows. At the beginning of every term, students having problems purchasing the permits online. During Covid pandemic, we didn't charge student for parking permits. Last Fall 2022, permits were required; but our credit card feature for the purchase was not functional. Our District team worked with Touchnet to fix the issue. So for Fall 2022, District used the JIRA ticket system for all the students requesting permits. Toward the end of Fall semester, the system got fixed. But in Spring 2023, students were charged more than once when they tried to purchase their permits There needed to be integration from our credit card merchant Touchnet to our student system PeopleSoft Campus Solutions. Due to the error, Touchnet was unable to automatically resolve the issue. Both the District staff and campus Student Accounting staff had to manually fix all the errors and process the refunds.

Yet another challenge that our department faces daily is the handling of our Financial Aid warrants. We need to have a better communication with Financial Aid and District Office. We need to streamline the process with District Office Accounts Payable and Financial Aid. This is to ensure a smooth operation so students can receive their warrants in a timely manner. If a business process changes, then it must be reflected and shared immediately with all involved parties.

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.
A major service change that our Student Accounting Office engaged is the way how our third parties want to be invoiced using certain online systems. By doing so, it requires staff members to personally register an account and go through trainings. Examples of third-party billings are: Retail Management programs, Amazon Choice, the Veterans Chapter 31 Vocational Rehabilitation program, and the Military programs (Post 911/GI Ch33, Navy, Marine, Army, Air Force).

Another major change was the HEERF funding for student outstanding debts which have created an abundance of work for not only our department but for the entire district. The decision was made to pay prior student enrollment debt but it impacted the Financial Aid students. At the beginning, it was not clearly defined how the HEERF funding would work to pay the student debt. This was not communicated well to students and the departments. Student distribution of HEERF funds went through the Edquity website. Unfortunately, this did not integrate with our current system which caused issues with auditing and reporting

purposes. Later the transactions posted in Campus Solutions for HEERF reporting purposes. It created confusion for the student regarding their accounts. It would have been a better process for everyone if management met with all involved parties.

Since the last comprehensive review, there is a lack of communication that affects departments when decisions/ideas are made for new work processes. The decisions made by other departments or external organizations has greatly impacted the amount and type of work for the receiving department who handles the work process. For example, our department have new trainings to use external org systems for third party invoicing and payment tracking. Another example, the last-minute decision for not dropping students greatly impacts and stresses our students. Yet another example, having new grants without a clear plan of disbursement.

If applicable, describe the impact of any new resources (human, fiscal, etc) on the unit and/or action plan implementation.
Our Student Accounting Office is impacted by not having enough office personnel. The department's workload has increased but our staffing has decreased. Our department has assisted with more duties and new work processes that impacts our campus, our District, and external organizations.

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.
Since returning from the COVID pandemic, the use of our Student Accounting Office emails has increased which requires ongoing monitoring and responding. We receive up to 50 emails/week from students, staff, faculty, and third parties. We have gotten an abundance of students with HEERF bus pass requests. The number of students for the EOPS and College Promise programs have increased in paying for student tuition and fees and parking permits. New scholarships and grants (i.e. CalKIDs, ECMC-Project Success, Pantry, Grocery Cards, Golden State Education & Training Grant) have been introduced. They require monitoring and maintaining accurate information and processing disbursement/reimbursement requests to our students, staff, and faculty. Also, new programs or grants have caused an increase in newly created Fiduciary accounts (i.e. Region X EOPS) to support the process of how funds are used.

Describe any equity gaps in the data. Are there differences and/or patterns observed by demographics (e.g.race/ethnicity, gender, age, etc.)
We service a diverse group of students with different race/ethnicity, socioeconomic status, gender and other demographic traits. For example, the number of students we serve for these student programs in processing payments are: EOPS (which pays for students' health fees, Associated Student fees, and parking permits): Fall 2022 – 511 students/Spring 2023 – 484 students; HEERF monthly/semester bus passes: Fall 2022 – 173 students/Spring 2023 – 200 students; and College Promise Emergency grants: Fall 2022 – 180 students/Spring 2023 – 172 students. We are responsible to disburse Project Success ECMC funds of $80K+ to eligible students. We have invoiced and received tuition fees from the Department of Veterans Affairs for our VA Ch31 students: Fall 2022- 60 students/Spring 2023 – 62 students and for our VA Ch33 students: Fall 2022 - 353 students/Spring 2023 - 572 students.

Related Documents for Charts and Graphs
CalKids data.pdf;
Student Accounting Office Survey _ Fall 2023_FA Fair part2.pdf;
Student Accounting Office Survey _ Fall 2023_FA Fair.pdf;
Student Accounting Services Survey 2023 Report.pdf;
Student Accounting Services Survey SP24 Report.pdf;
Student Accounting Survey Report _Fall 2024.pdf;
Fall 2025 Student Accounting Survey Results_Redacted.pdf

Summary and Reflection

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.
With the new programs and grants, our department constantly has to adapt to new changes in policies and procedures. We have to modify our processes in order to accommodate the students, staff, and faculty. We have to request new PeopleSoft reports in order to reconcile all the student accounts related to the third-party accounts and programs.

What other factors (internal or external) might also impact the above data trends and equity gaps?
Staffing changes have affected our office operations because the duties are temporarily given to new staff to handle, which requires time and training. Our department has to recruit and hire new employees to temporarily fill the vacant acting positions.

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.
Updates for 2023-2024: One of the success this year is that our Student Accounting department collaborated with the Financial Aid Office to streamline the process for all incoming external scholarship checks. All external scholarship checks will first go directly to our Financial Aid Office so they can be recorded and included in PeopleSoft as the student's award packaging. Then our Student Accounting department will deposit the check and disburse the funds appropriately.
One of the challenges that we currently face is the mail service is too slow for our department needs. The mail comes twice a week Monday and Wednesday. It is already an inconvenience that our mail does not get directly dropped off/picked up in our office. We have to go to another department to drop off/pick up mail. By doing so, it delays the process of all incoming/outgoing mail. Students are waiting for their scholarship/Financial Aid checks or our department not receiving the requests (AS/Fiduciary/Agency/Student Rep/Clubs) to process payments in a timely manner. Going directly to the mailroom is an inconvenience because we do not have sufficient staffing and sometimes the mail is not ready. The mailroom needs to have a better schedule to streamline the mailing service for our department needs.
Another challenge is Ch.33 Post 9/11 checks. Currently we have to request a special handling to AP to send us these warrants and then we would turnaround and include the debt letters with the checks. Due to the slow mail process, we get them almost a week later after we post the refund in PeopleSoft. Recently, we had an issue where the checks were erroneously mailed out by District without the debt letters. Sometimes the VA Debt Management Center would return the checks because they cannot identify who the debt belongs to.
In addition, another challenge is the availability of check signers for our special funds account (AS/Fiduciary/Club/Agency/Student Rep). This delays the process of disbursing our reimbursement checks or paying invoices since we are unable to get immediate signers for the checks.
The challenge that we still face is the parking permit issue where students are unable to purchase their permit online before the semester starts. Students are having issues due to compatibility and server overload. There should be a grace period for students to purchase their permit online or in person. We recommend having at least 1-2 weeks to help ease the student stress and to avoid students from paying daily permits.
Toward the end of last Spring 2023, our department function was impacted by the bank merger from Union Bank to US Bank. It caused issues with our deposits going to other campus bank accounts and checks being cashed twice or cashing an overage check. It also required more funding to purchase new bank supplies.

Summary and Reflection

Provide any edits or updates to the prompts originally documented in the Data Reflection section for Year 2.
Updates for 2023 -2024: Starting new fiscal year 2023, free bus pass program is no longer valid using HEERF funds. We currently are using Student Retention grant to fund eligible Mesa College students. Data is provided below using the current grant for free bus pass.

- July 2023 – 4 monthly bus pass for Retention
- Aug 2023 – 84 semester bus pass for Retention
- Sept 2023 – 63 semester bus pass for Retention
- Oct 2023 – 11 monthly bus pass for Retention

A new Financial Aid grant called Dream Act Service incentive grant program has surfaced which requires us to give the check directly to students.
The number of FA returned check warrants have increased due to invalid addresses by 10-20 checks.
The number of Amazon students have increased from about 6 to 20 students.
The number of sponsors for the Retail Management program have increased from 3 to 5. Food 4 Less and Ralphs were recently added to our third-party billing process. We recently had one special sponsor Smart and Final who continues to pay for a specific student after completing the Retail Certificate program.

In additions for this Fall 2023, our department participated in the Financial Aid Fair. It was held on November 15th for just a couple of hours. For the duration of this fair, we asked students who came to our Student Accounting booth to complete our department survey. The number of students who completed our survey was very low. We did not offer any good incentives to motivate all students to complete the survey. We have attached the survey questions and results for Fall 2023. We plan to participate in the Spring 2024 Financial Aid fair and give the same survey. Hopefully, we can get more and better results.

Review Outcomes Report. Review the unit's outcomes assessment process for 2022 - 2023. Discuss connections to unit goals/action plans/resource requests.
N/A

Provide any edits or updates to the prompts originally documented in the Practice Reflection section for Year 2.
Updates for 2023-2024: In addition to last year's program review practice reflection, we need to streamline the procedure for handling Financial Aid warrants (checks). Our department needs to have a structured procedure and timeline from Accounts Payable for different scenarios. Our department needs to have a consistent workflow and what documentation to provide with what communication method.

In collaboration with District and other Student Accounting Offices and Financial Aid Offices, we need to improve R2T4 school portion by processing a mass group post school portion after Financial adjust the award to avoid students paying for it and generating more refunds to process.

With agreement with District and the Financial Aid Office, we should channel the disbursements of Cal Kid grants through PeopleSoft Campus Solutions similar to how the Cal Grant is handled. This new grant has occurred frequently and the numbers of students have increased. This will also assist in better reporting than to have each campus handle them differently.

There are several departments who are giving students stipends using grant funding; but not enough communication is sent out to our Student Accounting department. Student Accounting Office will be the first department whom the student contacts about their disbursements.

YEAR 3 Updates (2024 - 2025)

Provide any edits or updates to the prompts originally documented in the Executive Summary section for Year 3.
Department Successes:
1. Staffing Achievements: The Student Accounting department successfully filled three contract positions—two 1.0 FTE roles and one 0.75 FTE role. This addition has strengthened our team's capacity and contributed to improved operations.

2. New Payment System Implementation: Our department collaborated with several key departments to integrate Square as a new credit card processor. This allows for more efficient payment collection for both the Fiduciary and Associated Students accounts, enhancing the student payment experience.

Department Challenges:
1. Credit Card System Transition: The implementation of Nelnet as our new credit card processor presented challenges due to

the timing of the transition. We are still in the process of finalizing configurations to ensure its full functionality. This system change has impacted our parking permit issuance process, as we have shifted from using the dedicated parking permit page to utilizing the comment page for these transactions. Continued adjustments are being made to optimize this new workflow.

Department Updates 2024-2025:
1. Child Care Fee Collection: This Fall 2024, we began collecting child care fees from parents utilizing services at our Child Development Center. This change ensures more accurate tracking and streamlined financial processes for the center. We're also working on a method for parents to make their payments online.

2. Basic Needs Lottery: In Fall 2024, we introduced a new item type for the Basic Needs Lottery, which enables direct disbursement of funds to students, providing timely support for those in need.

Provide any edits or updates to the prompts originally documented in the Data Reflection section for Year 3.
Data Reflection Year 3 Updates:
1. CalKIDS Scholarship Growth: The number of CalKIDS scholarships has seen a significant increase this Fall 2024, rising from 25 checks to 300 checks. This substantial growth reflects a higher demand for financial support and an expansion of the program's reach.

2. Third-Party Billing Increases:
Department of Rehabilitation: Billing from our third-party Department of Rehabilitation has increased, primarily due to the addition of multiple new locations. This growth in service locations has led to a rise in associated billing volumes. Retail Management Program: Our third-party Retail Management Program has also experienced an uptick, with a notable increase in the number of new vendors involved in the program. This expansion has contributed to an increase in financial transactions and program activity.

3. Student Check Refunds: Due to the transition from Touchnet to Nelnet, there has been an increase in student check refunds. This change arose because we no longer have the ability to return funds directly to the original payment card, resulting in a higher volume of refunds issued by check.

4. Our Student Accounting participates in the Financial Aid fair every Fall and Spring term. Comparing Fall 2023 to Fall 2024, the number of student participating in our department surveys have increased from 34 to 81 responses. Last Fall 2023, we only used QR code. This Fall 2024, we used QR code as well as have paper surveys printed in case students have technical difficulties with their mobile devices. According to our department surveys, we assist students from different ethnic and socio economic backgrounds. The Fall 2024 survey report is included in the data reflection section with the prior Fall 2023 survey.

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

Provide any edits or updates to the prompts originally documented in the Practice Reflection section for Year 3.
Practice Reflection - Year 3 Updates:
1. Streamlining the CalKIDS Process: We continue to work on streamlining the CalKIDS scholarship process to ensure seamless posting to students' accounts in PeopleSoft. Successfully integrating this step will significantly enhance our sustainability and operational efficiency moving forward.

2. R2T4 Process: The Return to Title IV (R2T4) process has yet to be addressed. This remains an area for improvement that will require attention in the coming year to ensure compliance and efficiency.

3. FA Warrant Process Collaboration: The Student Accounting Office worked closely with both the District and Financial Aid Offices to streamline the Financial Aid (FA) warrant process. We have successfully transitioned to using Teams for communication, eliminating the need to submit affidavits for overage FA warrants. This collaboration has resulted in improved workflows and better coordination between departments.

Summary and Reflection

YEAR 4 Updates (2025 - 2026)

Provide any edits or updates to the prompts originally documented in the Executive Summary section for Year 4.
Department Success (2025-2026):
Two temporary Project Assistants – Our department is grateful that we were able to temporarily hire two project assistants to our team as we transition the office duties of our retirees and sufficient staff while we seek the replacements for our retirees.

Virtual Parking Permits – Effective Summer 2025, our department no longer handles the sale of the student parking permits. Students can go online and order their virtual parking permit. The students would enter their vehicle information. No more worries about permits being lost or stolen.

Department Challenges (2025-2026):
Virtual Parking Permits – With the virtual parking permit, there is a minor challenge to our department. Our department staff cannot tell if students have ordered a virtual permit when we apply the student to a third-party contract. We would need to contact our Campus Police Office to verify the information, and we must wait until the end of the term to start our billing process. This causes delay with our third-party billing.

New special funds accounts – The transfer of duties for Co-Curricular, Revolving Cash Funds, and Student Printing from Business Services to Student Accounting is a challenge because we did not receive sufficient training and funds for this transition. We expect to request additional funding to the Co-Curricular accounts. Also, we plan to work on some procedures and new fillable forms to better organize these accounts.

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

1. Student Surveys for Financial Aid Fair - This Fall, we changed our student survey questions at our Financial Aid Fair. We didn't get as many participants as we expected to complete our student surveys. But the FA Fair had low attendance this year, which affected our results. It was because the FA Fair was scheduled for Tuesday rather than Wednesday. The reason for having the FA Fair on Tuesday this year was to capture students who attended Tuesday and Thursday classes. See attachment for survey questions and results for Fall 2025. We plan to conduct the same student survey at the next Financial Aid fair in Spring 2026.

2. Accounts Receivable Write-Off – Proposed write-offs done on a quarterly or bi-annual basis rather than a yearly basis before fiscal year end. At the end of fiscal year, our department is very busy closing out all books and getting ready for new fiscal year. The write-offs take a long time to process.

3. CalKids – Over the years, we have been receiving an increase of checks from CalKids (see attachment for data). In our first year 2023 -2024, we received 35 checks totaling $17, 977.30. In 24-25, the volume increased substantially to 221 totaling $119,358.10. For the current fiscal year 2025-2026, as of 11/20/25, we have received 206 checks totaling $120,744.32. These figures represent Mesa College only. If we combine all three colleges, the totals become even more substantial. Given the rapid growth in the workload of these CalKids checks, the District should administer the refund through PeopleSoft Campus Solutions rather than continuing with separate bookkeeping processes at the campus level. By centralizing the process, it will improve efficiency, ensure uniformity, and support accurate financial reporting.

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

Provide any edits or updates to the prompts originally documented in the Practice Reflection section for Year 4.
1.CalKids – Currently, we manually process and disburse student checks at each campus. All three Student Accounting Offices are collaborating with District to streamline this workflow and centralize the disbursement of the CalKids checks. The proposed new process is to post all incoming CalKids checks into PeopleSoft. District will record these funds as a Financial Aid award. Once the awards are released, they will post on the students' accounts and automatically apply to any outstanding mandatory fees. Any remaining funds will then be disbursed to the students through the standard Financial Aid refund process. District is currently testing the journal entry interface between Campus Solutions and Finance to ensure the transactions are posted correctly. District will need to establish budget amounts for the general ledger accounts associated with CalKids funding to enable disbursement of refunds. The implementation of this proposed process is scheduled to go into effect for

Summary and Reflection

Spring 2026.

2. R2T4 school portion – The process of posting R2T4 school portion should be handled at the District level; or alternatively, the amount should be collected directly from students rather than remaining as a liability to the school. Once Financial Aid determines the amount, then it should be placed in queue to post automatically on the student's account instead of relying on Student Accounting staff to manually review and post.

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

Professional Learning

Unit Goal: Professional growth opportunity and training for department staff to better support and monitor our students with new programs and/or grant funding.

Goal Status: Active

Beginning Year: 2022 - 2023

Projected Completion Year: 2025 - 2026

Mapping

Mesa College Strategic Plan: Roadmap to Mesa2030:

- **Community - Objective 1:** Use technology to improve communication and accessibility across campus. (✓)
- **Pathways and Partnerships - Objective 3:** Increase community engagement, experiential learning, integrated career planning, and workforce training to prepare students for future careers (✓)
- **Scholarship - Objective 1:** Expand and prioritize professional learning experiences for all employees that create parity in outcomes across racial/ethnic groups and all disproportionately impacted groups (✓)

Action Plans	Updates
Action Plan Status: Active **Action Plan:** Goal 1 Action List: 1. Request for the position through Classified Hiring Priority process 2. Encourage and support the staff in applying for the reclassification process. 3. Engage in professional trainings **Action Plan Cycle:** 2025 - 2026, 2024 - 2025, 2023 - 2024, 2022 - 2023	**Submission Date**: 11/26/2025 **Action Plan Update**: We applied for reclassification in Spring 2025. Process for reclassification was denied. We received new accounts but still need additional to process requests for these new accounts. **Update Year**: 2025 - 2026 **Action Plan Progress**: Barriers Encountered **Submission Date**: 12/02/2024 **Action Plan Update**: Two Senior Account Clerks have been hired. Still working on reclassifying Senior Account Clerks to Accounting Technicians due to the technical difficulties of using PeopleSoft Campus Solutions and Finance. **Update Year**: 2024 - 2025 **Action Plan Progress**: On Track **Submission Date**: 11/29/2023 **Action Plan Update**: Just hired a new Accounting Tech. Transfer one staff from .75FTE to 1.0 FTE. In progress on hiring the replacement of 2 Senior Account Clerks. Planning to have staff attend trainings/conferences when department is fully staff. Need to work with other campuses to reclass the Senior Account Clerks to be Acct Techs due to the complexity of PeopleSoft. **Update Year**: 2023 - 2024 **Action Plan Progress**: On Track

Unit Goals, Action Plans, and Updates

Streamline the Check Warrant Processes

Unit Goal: Collaboration with District Office and Financial Aid Office to streamline the check warrant processes.

Goal Status: Completed

Beginning Year: 2022 - 2023

Projected Completion Year: 2024 - 2025

Mapping
Mesa College Strategic Plan: Roadmap to Mesa2030:

- **Completion - Objective 4:** Support students' access to resources to mitigate the impact caused by technological and basic needs insecurity (✓)
- **Pathways and Partnerships - Objective 1:** Develop and implement frameworks to create communities that can provide more targeted delivery of educational resources and support services. (✓)
- **Stewardship - Objective 3:** Increase student access and schedule efficiency by coordinating schedules among departments/disciplines (✓)

Action Plans	Updates
Action Plan Status: Active **Action Plan:** Goal 2 Action List: 1. Work with the Financial Aid Office on different scenarios and propose the plan for each scenario. 2. Request a "All Hands On" meeting with all parties/department involved and discuss the proposed plan and implement it. **Action Plan Cycle:** 2025 - 2026, 2024 - 2025, 2023 - 2024, 2022 - 2023	**Submission Date**: 12/02/2024 **Action Plan Update**: Worked with District and Financial Aid and agreed on the process. No affidavit required for overage warrants. AP cancel overage warrants and notifies Special Funds who will send the form to Financial Aid for review. Financial Aid will complete the form and notify Student Accounting to cancel the overage Financial Aid refunds in Campus Solutions. **Update Year**: 2024 - 2025 **Action Plan Progress**: Completed **Submission Date**: 11/29/2023 **Action Plan Update**: In agreement with Financial Aid for overage check cancellation, Student Accounting will verify any on-hand checks and give them to FA to adjust award and any other non-physical checks will be handled by FA based on District's email. District agrees to not enforce the 30-day FA check cancellation. Still need to complete other scenarios with FA. **Update Year**: 2023 - 2024 **Action Plan Progress**: On Track

Unit Goals, Action Plans, and Updates

New Contract Position

Unit Goal: Establishment of new contract positions and continuous project assistants (preferably full-time, if possible) to assist with new projects related to student retention, success, and equity.

Goal Status: Active

Beginning Year: 2022 - 2023

Projected Completion Year: 2025 - 2026

Mapping
Mesa College Strategic Plan: Roadmap to Mesa2030:

- **Stewardship - Objective 4:** Establish a college-wide practice and schedule that addresses routine maintenance and renewal of equipment, facilities and technology to ensure access to adequate resources and better serve students (✓)
- **Stewardship - Objective 6:** Develop a proactive hiring plan that includes a review of advertising, screening, and interviewing with a goal of establishing a diverse and competent workforce that is reflective of the student population and the local community (✓)

Action Plans	Updates
Action Plan Status: Active **Action Plan:** Goal 3 Action List: 1. Keep the current project assistants 2. Allow for Project Assistants to work full-time 3. Approval to hire new contract positions with appropriate job classification. **Action Plan Cycle:** 2025 - 2026, 2024 - 2025, 2023 - 2024, 2022 - 2023	**Submission Date**: 11/26/2025 **Action Plan Update**: We hired 2 temporary project assistants to assist with the transition of our contract employees who will be retiring in the next couple of months. **Update Year**: 2025 - 2026 **Action Plan Progress**: On Track **Submission Date**: 11/29/2023 **Action Plan Update**: If funding is available next year, we need project assistant (PAs) especially during busy registration time; but hiring part-timers are not easy because everyone wants to work full-time. Need approval for PAs to work full-time. **Update Year**: 2023 - 2024 **Action Plan Progress**: On Track

Centralization of CalKIDS funds

Unit Goal: Channel all CalKIDS funds to District for Posting and Disbursement

Goal Status: Active

Beginning Year: 2024 - 2025

Unit Goals, Action Plans, and Updates

Projected Completion Year: 2025 - 2026

Mapping
Mesa College Strategic Plan: Roadmap to Mesa2030:

- **Community - Objective 1:** Use technology to improve communication and accessibility across campus. (✓)
- **Completion - Objective 4:** Support students' access to resources to mitigate the impact caused by technological and basic needs insecurity (✓)
- **Pathways and Partnerships - Objective 1:** Develop and implement frameworks to create communities that can provide more targeted delivery of educational resources and support services. (✓)

Action Plans	Updates
Action Plan Status: Active **Action Plan:** 1. Send Checks and List to District: All checks (CalKIDS or similar) and the accompanying list of students (including necessary information) should be sent to the District office for processing. 2. Abatement Process: The checks will undergo an abatement process, which typically refers to verifying and adjusting the funds as necessary (e.g., ensuring the correct amounts are allocated for each student). 3. Posting to Student Accounts: After the checks are abated, the funds will be posted to the appropriate student accounts in the District's system, ensuring each student receives the appropriate credit or deposit. 4. Disbursement to Students' Accounts: The final step involves disbursing the funds to the students' accounts, either through refunds, credits, or other methods aligned with the District's financial aid procedures. This process ensures centralized handling and proper allocation of funds to student accounts. **Action Plan Cycle:** 2025 - 2026	**Submission Date**: 11/26/2025 **Action Plan Update**: Instead of sending all checks to District, Student Accounting will posts the checks as a revenue using speed types. It will be deposited into a new set of General Ledger strings. A budget will be created to disburse the funds on the students account and any remaining funds will be disburse to students similar to the Financial Aid refund process. District Finance is testing to ensure the journal entry postings will balance when it interface from Campus Solutions. District estimates the process to take place in January 2026. **Update Year**: 2025 - 2026 **Action Plan Progress**: On Track **Submission Date**: 12/02/2024 **Action Plan Update**: 1. CalKIDS Checks Sent to District General Accounting: All checks will be sent to the District General Accounting office for deposit. 2. Posting to Student Accounts by District Student Financials: After the checks are deposited, the District Student Financials office will be responsible for posting the funds to the appropriate student accounts. 3. Disbursement Process Similar to Financial Aid Refunds: The disbursement of CalKIDS funds will follow a process similar to the Financial Aid refund process, meaning the funds will be distributed according to the same procedures used for financial aid disbursements. This likely involves issuing refunds or credits to students based on their accounts. This process centralizes the management of CalKIDS funds, streamlining the workflow between the two departments to ensure funds are properly deposited and posted to student accounts. **Update Year**: 2024 - 2025 **Action Plan Progress**: On Track

Unit Goals, Action Plans, and Updates

Student Accounting Reorganization

Unit Goal: To reorganize the Student Accounting Offices to align with other colleges and District

Goal Status: Active

Beginning Year: 2024 - 2025

Projected Completion Year: 2025 - 2026

Mapping
Mesa College Strategic Plan: Roadmap to Mesa2030:

- **Pathways and Partnerships - Objective 1:** Develop and implement frameworks to create communities that can provide more targeted delivery of educational resources and support services. (✓)
- **Scholarship - Objective 1:** Expand and prioritize professional learning experiences for all employees that create parity in outcomes across racial/ethnic groups and all disproportionately impacted groups (✓)
- **Stewardship - Objective 5:** Increase campus understanding, communication of and transparency in budget and resource allocation (✓)

Action Plans	Updates
Action Plan Status: Active **Action Plan:** To collaborate with all 3 college Student Accounting Offices **Action Plan Cycle:** 2024 - 2025	**Submission Date**: 11/26/2025 **Action Plan Update**: Last Spring we attempted to re-organize by using the reclassification process for our Senior Account Clerks and Accounting Technicians as our first step in this reorganization plan. The reclassification was approved and recommended by the Analyst/AFT Panel. But the recommendation was not accepted by the President/Vice Chancellor. This created a roadblock to our re-organization plan. **Update Year**: 2025 - 2026 **Action Plan Progress**: Barriers Encountered
	Submission Date: 12/02/2024 **Action Plan Update**: To align with the broader goals of District and other colleges, ensuring we are better positioned to serve our students. To be integrated into the District's strategic goal 2030. **Update Year**: 2024 - 2025 **Action Plan Progress**: On Track