Administrative Services Program Review 2018/19 (Comprehensive)

Business Services

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General Information (Administrative Services Program Review 2018/19 (Comprehensive))

2018/19 Administrative Services Program Review

Program Review Data and Resources

Submission Information (REQUIRED)

- Name of Lead Writer: Erica P. Garcia
- Name of Liaison: Kevin Branson
- Name of Manager/Service Area Supervisor: Lorenze Legaspi

Faculty/staff (REQUIRED)

- Number of Full-Time Classified Professionalsone supervisor, four classified staff

Service Area Mission (REQUIRED)

Enter the service area mission.

The Mesa Business Services Division provides professional, responsible, diversified, innovative and quality services, which complement the instructional and student services functions of the college to assist the institution in achieving its educational mission. We are a customer service and support function of the College, serve as fiscal stewards of resources, and we strive for improvement and excellence.

The Business Services office provides timely and accurate financial information and services to support and assist students, faculty, staff, the District, and external entities by utilizing sound accounting practices and adhering to proper internal controls which ensures accountability, fiscal compliance, and proper use of public funds. We strive to maintain and enforce professional and ethical standards, while adhering to SDCCD policies and procedures.

How does your service area mission support the mission of the College?
San Diego Mesa College is a comprehensive community college committed to access, success, and equity. We honor those commitments as a diverse community of faculty, students, professional staff, and administrators who collaborate to foster scholarship, leadership, innovation, and excellence in an inclusive learning environment. By promoting student learning and achievement that leads to degrees and certificates, transfer, workforce training, and lifelong learning, we empower our students to reach their educational goals and shape their future.

Service Area Overview (REQUIRED)

Form: 2018/19 Comprehensive Program Review Administrative Services Program Overview Section (See appendix)

Outcomes and Assessment (REQUIRED)

Form: 2018/19 Comprehensive Program Review Administrative Services Outcomes and Assessment Section (See appendix)

Service Area Analysis (REQUIRED)

Form: 2018/19 Comprehensive Program Review Administrative Services Program Analysis Section (See appendix)

Form: "2018/19 Comprehensive Program Review Administrative Services Program Overview Section"

Created with : Taskstream
Participating Area: Business Services

(REQUIRED) Service Area Name

Business Services

(REQUIRED) Service Area Strengths

Discuss strengths of the service area.

Business Services is made up of a strong and cohesive team. The staff is well versed and knowledgeable in policy and procedure, and is cross trained to provide excellent customer service. The deparment oversees and manages the funding for the campus in order to assure that the college is financially sound, and in good standing with internal and external entities.

(REQUIRED) Service Area Challenges

Discuss challenges to the service area.

Delay of ERP

The PeopleSoft ERP system has caused barriers and obstacles to data and resources

Hyperyon

Additional work has been delgated to the department. This includes all accounting for the Mesa Foundation, managing Pay to Print revenue budget, and increased duties added by the District. The accounting responsibilities of the Mesa Foundation include all aspects of bookkeeping, year-end closing, support of audits, scholarship awards, and working closely with director on scholarships and mini-grants for campus. This additional workload from the Mesa Foundation is taking up at least 50% in a normal working day and can take up to 100% during peak times of one administrative technician. In addition the department has been tasked with managing the Pay to Print Revenue budget. This entails setting up purchase orders for maintenance and leasing of copier machines, processing invoices for payment, collecting money from machines around campus, counting and depositing money, and reconciling the bank statement. The District office has delegated additional duties to the campus as well. This includes setting up payees of revolving cash and co-curricular, and recipients of financial aid, as suppliers in People Soft. The department has also been tasked by the District to follow up on receipt of purchase orders, status of order and requesting invoices. The District now requires the campus to work closely with accounts payable to clear discrepancies with invoicing and confirm receipt of purchase orders with the Stockroom. The demands of the system and new work method have led to the current Accounting Supervisor to take on additional work that could be handled by an administrative technician. The additional workload has made it necessary to add an additional staff member because of the impact it has on current staffs' productivity.

During 2017-2018, 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 2019. 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 17-18, 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.

(REQUIRED) External Influences

Discuss external influences (Collegewide and beyond).

District- The District has delegated additional responsibilties to the campus which used to be housed with District Business Services. This includes setting up payees of revolving cash and co-curricular, and recipients of financial aid, as suppliers in People Soft. The department has also been tasked by the District to follow up on receipt of purchase orders, status of order and requesting invoices. The District now requires the campus to work closely with accounts payable to clear discrepancies with invoicing and confirm receipt of purchase orders with the Stockroom.

Technology- People Soft lacks in efficiency, and in turn creates a greater workload for the department and the entire campus.

(REQUIRED) Areas of Focus

Describe one or more areas that your department is focusing on. You will refer to this response in the Program Analysis Section.

The department will contintue to work as a cohesive team to provide hands on type of customer service, problem solving, increase efficiencies, and ensure a smooth workflow in order to successfully support the campus.

Form: "2018/19 Comprehensive Program Review Administrative Services Outcomes and Assessment Section"

Created with : Taskstream
Participating Area: Business Services

(REQUIRED) Service Area Name

Business Services

(REQUIRED) We are halfway through our 6-year cycle. Is your area on target to complete assessment by Spring 2022? Please attach your schedule for assessment, with explanations as needed.

Refer back to Direction #3 on how to attach documents.

We are on target to complete assessment by Spring 2022. We plan on assessing all three of our AUOs according to the following tentative timeline:

AUO 2 and 3 will be assessed in the 2018-19 assessment cycle. AUO 1 will be assessed in the 2019-2020 assessment cycle.

(REQUIRED) Please list your AUOs.

Mesa College Business Services Office will pursue collaborative efforts with District Business Services for improved procedures to support business operations to Mesa College.

Mesa College Business Services Office will improve its “open door” policy to college personnel for increased customer service.

Mesa College Business Services Office will continue to provide on-line business information access to college personnel for timely and effective processing of all related matters.

(REQUIRED) What have your completed assessments revealed about your area?

The assessment for AUO 1 has revelaed in order to successfully continue to improve procedure to improve buisness operations our office has developed alternative processes in the form of working closer with District accounts payable in order to ensure timely payments to vendors. We are also taking the task of following up with vendors to ensure that purchase orders are received in a timely manner in order to support the campus' request.

In the assessment of AUO 2 our office has taken the "open door" policy to a higher level by centralizing travel requests with hands on guidance as well as entering each traveler's travel authorization, expense reports, cash advances and payments requests in People Soft.

AUO 3 has yet to be assessed.

(REQUIRED) If issues or problems were identified, what is your plan for implementing change?

Our office issues and problems derive form external influences such as communication with SDCCD and implementation of Campus Solutions. Because of the roll out of Campus Solutions the finance issues have not been addressed. These issues are inaccurate reporting (e.g., finance, purchasing, HCM, travel, etc.), technical glithces. Currently, the budget reporting that has been provided through the shared drive for Mesa contains inaccurate and outdated reports. Since the department has no control over changes in the system, the office generates and issues the reports to departments, and also training to explain the data.

(REQUIRED) Based on your assessments, have you identified resource needs?

- Budget
- Equipment
- Facilities
- Classified Professionals

Please provide any other comments.

No answer specified

Form: "2018/19 Comprehensive Program Review Administrative Services Program Analysis Section"

Created with : Taskstream
Participating Area: Business Services

(REQUIRED) Service Area Name

Business Services

(REQUIRED) Given your stated area(s) of focus in Part 4, has your service area introduced new or different actions that have changed how you do your work? Please describe.

Our area of focus is to continure to provide hands on type of customer service, problem solving, increase efficiencies, and ensure a smooth workflow in order to successfully support the campus. By doing so we have taken the following actions:

-providing one on one training

-centralizing the input of travel/expense, requisitions in People Soft

-provide budget reports

-closely work with vendors to assure that purchase orders and payments are received in a timely manner

-provide full time financial services for the Mesa Foundation

This has changed how we do our work by redirecting staff resources.

(REQUIRED) How do you create an environment that fosters equity, diversity, and inclusion?

We have a diverse office staff, and provide the same quality of customer service to all departments and students. All staff is up to date on EEO training, and one of our outcomes is to provide access to information to the entire college.

(REQUIRED) Do you see trends in access to your services? What changes might you foresee in the next 2-3 years?

The trend we forsee is an increase of ongoing hands on services due to the issues with People Soft, and an increase in number of grants, special funding and becoming an HSI.

(REQUIRED) Do you have a vision for your area’s future? Do you have ideas for changes to services or procedures? Please explain.

The vision for our area's future is tied in with our goals which include more training on policy and procedure, updating the website, and educate on budget. The ideas for change to the service are explained in the action plans for each goal.

(REQUIRED) Describe how your area interacts and collaborates with other College areas/programs and the effects of that interaction

We have limited interactions with Miramar, City, and Continuing Ed. in the form of conversations related to problem solving aroung challenges with the financial system. We have constant interaction with the District purchasing and accounts payable. The effects of that interaction is to assure that purchase orders are sent/received and paid in order to successfully service the campus' needs. We work with all campus programs and departments in order to make sure that all their needs are met (ordering supplies, equipment purchases, travel, services, facilites requests, payroll, etc.).

Service Area Goals (REQUIRED)

2018/2019 Business Services Goals

Goal

Goal	Mapping
Train College on policy and procedures Business Services plans to train the College on policy and procedures. This includes topics of travel and requisitions. This will be done on an ongoing basis and it is intended to increase efficiencies , ensure compliance with policies and procedures, and promoting good customer service.	**CA- Mesa College Strategic Directions and Goals:** Strategic Goal 1.6, Strategic Goal 2.4, Strategic Goal 3.2, Strategic Goal 4.4, Strategic Goal 5.2, Strategic Goal 6.1, Strategic Goal 6.3, **Institutional Learning Outcomes 2016/17:** Communication, Critical Thinking, Information Literacy, Professional & Ethical Behavior
Improve website Within one year, Business Services will focus on improving the service area website to make it user friendly, informative, and visually appealing. This will enhance accessibility and help with training, thus contributing to. a higher level of customer service.	**CA- Mesa College Strategic Directions and Goals:** Strategic Goal 1.6, Strategic Goal 2.4, Strategic Goal 4.4, Strategic Goal 5.2, Strategic Goal 6.1, **Institutional Learning Outcomes 2016/17:** Communication, Information Literacy
Educate College on budget On an ongoing basis, the Business Services Office will provide training on budget reporting. The focus will be on understanding budget transactions, reporting categories, and best practices.	**CA- Mesa College Strategic Directions and Goals:** Strategic Goal 1.6, Strategic Goal 2.4, Strategic Goal 4.3, Strategic Goal 4.4, Strategic Goal 5.1, Strategic Goal 6.1, Strategic Goal 6.3, **Institutional Learning Outcomes 2016/17:** Communication, Critical Thinking, Information Literacy, Professional & Ethical Behavior

Action Plans (REQUIRED)

Actions

2018/2019 Business Services Goals

Goal

Goal: Train College on policy and procedures

Business Services plans to train the College on policy and procedures. This includes topics of travel and requisitions. This will be done on an ongoing basis and it is intended to increase efficiencies , ensure compliance with policies and procedures, and promoting good customer service.

Action: Schedule outreach to departments

Describe the actions needed to achieve this objective:	-schedule workshops or one on one training -sending email updates and reminders -continue to have an open door policy
Who will be responsible for overseeing the completion of this objective:	-travel outreach, Virginia Enriquez -requisition outreach, Marco Chavez -overview on policy & procedure
Provide a timeline for the actions:	-once a semester or as requested by department
Describe the assessment plan you will use to know if the objective was achieved and effective:	-completing once a semester training -provide surveys after training for feedback -monitor workload due to requests for assistance
List resources needed achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):	-material preparation -room reservation

Goal: Improve website

Within one year, Business Services will focus on improving the service area website to make it user friendly, informative, and visually appealing. This will enhance accessibility and help with training, thus contributing to. a higher level of customer service.

Action: Designing layout of website

Describe the actions needed to achieve this objective:	-schedule a meeting to discuss ideas. Each participant would come with ideas/plan -evaluate current website to see what needs to be changed -work with communications to make changes -implement changes
Who will be responsible for overseeing the completion of this objective:	Maggie Haddad, Marco Chavez
Provide a timeline for the actions:	1 year
Describe the assessment plan you will use to know if the objective was achieved and effective:	-changes have been implemented -do test runs by outsiders to see if the website accessible and helpful
List resources needed achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty,	-assistance from Office of Communications -time

Other):

Goal: Educate College on budget

On an ongoing basis, the Business Services Office will provide training on budget reporting. The focus will be on understanding budget transactions, reporting categories, and best practices.

Action: create short videos on budget

Describe the actions needed to achieve this objective:	-video on how to run a budget report -video on how to monitor budget -video on how to understand a report
Who will be responsible for overseeing the completion of this objective:	- Maco Chaves -Rosa Mejia
Provide a timeline for the actions:	1 year
Describe the assessment plan you will use to know if the objective was achieved and effective:	- video will be available on the website - survey on the website
List resources needed achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):	- time -communication office

Closing the Loop (REQUIRED)

Form: 2018/19 Comprehensive Program Review Administrative Services Closing the Loop (See appendix)

Form: "2018/19 Comprehensive Program Review Administrative Services Closing the Loop"

Created with : Taskstream
Participating Area: Business Services

(REQUIRED) Service Area Name

Business Services

(REQUIRED) Which one(s) of the following were received in past year?

- None

(REQUIRED) How have these resources benefited your service area?

N/A

Request Forms

- **BARC & Facilities Requests**
- **Classified Position Request**
- **Faculty Position Request**

Reviewers

Liaison's Review

Form: Administrative Unit Program Liaison's Review 2018/19 (Comprehensive)

Manager's Review

Form: Administrative Unit Program Manager's Review 2018/19 (Comprehensive)

Appendix

A. **2018/19 Comprehensive Program Review Administrative Services Program Overview Section** (Form)
B. **2018/19 Comprehensive Program Review Administrative Services Outcomes and Assessment Section** (Form)
C. **2018/19 Comprehensive Program Review Administrative Services Program Analysis Section** (Form)
D. **2018/19 Comprehensive Program Review Administrative Services Closing the Loop** (Form)