Administrative Services Program Review 2019/20 UPDATE

Business Services

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General Information (Administrative Services Program Review 2019/20 UPDATE)

2019/20 Administrative Services Program Review

SUBMISSION INFORMATION AND UPDATES (REQUIRED)

A.

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

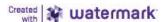B. Updates

Service Area Challenges

We continue to experience increasing demands from the campus and District. With the implementation of the PeopleSoft system (Finance) in July 2015, the technical demands and workload expectation increased. The Human Capital Management followed after, requiring additional collaboration between the Business Office and Business Support Office. The department is now monitoring payroll budgets, and making adjustments in order to correct discrepancies. With the recent implementation of Campus Solutions, we are experiencing greater challenges. Due to Business Office Support's lack of training and knowledge of budget processes, Business Services is finding more errors in payroll. These include incorrect budget numbers being used, incorrect job coding, and overpayments. Business Services experiences increased workload by having to correct the other department's mistakes, make adjustments, and train the department.

Business Services has been assigned with the accounting responsibilities of the Mesa Foundation. These responsibilities include all aspects of daily bookkeeping, monthly reconciliation, 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 20 hours in a normal working week and can take up to 40 hours during peak times of one administrative technician in the department.

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 process of collecting money from across the campus, counting and recounting money to verify accuracy, depositing money to the bank, and reconciling the account can take up to 7 hours a week, and requires four staff and the Accounting Supervisor to complete the work in compliance with separation of duties.

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 orders 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 should be handled by an Administrative Technician. This includes processing budget transfers and journal entries, travel, purchase orders, and payments and grant reporting. In addition the number and dollar volume of grants and contracts has risen 65% over the past 4 fiscal years.

Three administrative technicians and one Senior Accounting Technician are responsible for processing all purchasing, invoicing, travel, budget and reporting for the entire college. The department has one supervisor and the VPA. Currently to meet all of the increased reporting deadlines from grants and projects, the Supervisor works above normal hours and operations. Work and projects with lower priority get pushed back and impact the campus. The complexity of the system, lack of reporting and user tools requires a higher level of skill set to meet the demands of current operations. Given the complexity of the system, and the impact on productivity and processing, the Supervisor steps in to do staff level work to keep backlog from happening. In order for the department to not accumulate work and successfully support the

campus' needs, the department requested the assistance of another classified staff. This person works overtime on an average of 10 hours per week or more during peak times such as the beginning of the fiscal year, processing of BARC requests, and year-end closing. Some of the biggest areas of concern, which causes the most backlog, would be the duties of processing payments, closing purchase orders, supplier set ups, individualized travel training, payroll corrections and identifying errors in budget reporting.

External Influences

District Office

Business Office Support

People Soft-technical errors/issues

Mesa Foundation

OUTCOMES AND ASSESSMENT (REQUIRED)

Form: 2019/20 Program Review Outcomes and Assessment Section (See appendix)

PROGRAM ANALYSIS FOR EQUITY AND EXCELLENCE (REQUIRED)

Form: 2019/20 Program Review Administrative Services Analysis Section (See appendix)

PROGRAM GOALS (REQUIRED)

2018/2019 Business Services Goals

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.

Mapping

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.

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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.

Mapping

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,

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ACTION PLANS FOR GOALS (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.

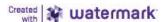| **Action:** Schedule outreach to departments	
Describe the actions needed to achieve this objective:	-schedule workshops or one on one training -sending email updates and reminders -continue to have an open door policy
Who will be responsible for overseeing the completion of this objective:	-travel 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 to	-material preparation

achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):	-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 to achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):	-assistance from Office of Communications -time

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	-video on how to run a budget report -video on how to monitor budget

objective:	-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:	December 18, 2020
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 to achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):	- time -communication office

GOAL STATUS REPORT (REQUIRED)

Action Statuses

2018/2019 Business Services Goals

Goal

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

Status for Schedule outreach to departments

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:	Business Services will continue to schedule outreach/training to the campus regarding policy and procedure, travel, and requisitions.

Goal: Improve website

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Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):

Status for Designing layout of website

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:	Business Services has made improvements to the website and will continue to update and post forms.

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

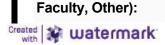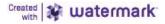|	
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Status for create short videos on budget

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:

Business Services provides budget reports on a monthly basis to administrators, and meets with departments to review and update budget statuses.

Request Forms

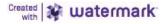### CLASSIFIED POSITION, BARC AND FACULTY POSITION REQUEST

Reviewers

LIAISON'S REVIEW

Form: Administrative Services Liaison's Review 2019/20 UPDATE

MANAGER'S REVIEW

Form: Administrative Services Manager's Review 2019/20 UPDATE

Appendix

A. **2019/20 Program Review Outcomes and Assessment Section** (Form)
B. **2019/20 Program Review Administrative Services Analysis Section** (Form)

Form: "2019/20 Program Review Outcomes and Assessment Section"

Created with : Taskstream
Participating Area: Business Services

(REQUIRED) Program name

Business Services

(REQUIRED) Are you on target with your assessment schedule?

Yes we are on target with the assessment schedule.

(REQUIRED) What have your assessments revealed about your courses/programs/service area/school/division/office?

We have observed that although we provide excellent customer service there is still room for improvement. We will need to monitor what the campus needs more assistance with, and plan how to better servce our customers.

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

Based on our assessment of AUO 2, the department is in need of a tablet to have customers to identify what type of service they are coming in for.

Please provide any other comments.

No answer specified

Form: "2019/20 Program Review Administrative Services Analysis Section"

Created with : Taskstream
Participating Area: Business Services

Administrative Service Area Name

(REQUIRED) Type your service area name.
Business Services

Part A: In this section, please analyze your service area in terms of its role in promoting equity and excellence as well as its contribution to the College's identity of being a Hispanic Serving Institution.

(REQUIRED) A1. How does your area help foster equity and excellence across the campus?
We work directly with faculty, staff and administrators to promote equity and excellence and HSI. We promote equity, excellence and support HSI, by processing the campus' requests for supplies, equipment and services. Also, as stewards of the grants (Student Equity, SSSP,...) that promote these campus-wide goals, we analyze, project and monitor these budgets in order to utilize the resources in order to reach the program's goals. These requests provide the access and support that underpriviliged students need in order to succeed in their educational paths.

(REQUIRED) A2. How does your area contribute to the College's identity of being an Hispanic Serving Institution (HSI)?
Business Services works directly with individuals who are responsible for HSI funding. We assist these individuals with monitoring budgets, and fulfilling the requests that provide the services and resources that promote academic success to the Hispanic student population.

(REQUIRED) A3. Have you made any changes to services or procedures in support of the topics discussed in A1 and A2? Explain.
We have now taken on the responsibility of going out and purchasing food for Hunger Free and the Stand, going beyond submitting a purchase order.

(REQUIRED) A4. What data do you collect to inform your practices, policies, and procedures? How do you use this data? What have you learned from this data? If you don't collect any data, how can the Mesa Research Office support you in this area?
We have not collected data, however we are in the process of creating a system to capture information on the services provide that will help us better serve the campus.

Part B: In this section, look at the area of focus you identified in last year's program review and answer the following questions.

(REQUIRED) B1. How have you developed this focus? Are you seeing any results? What are your next steps?

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.

In order develop our focus on supporting the campus' needs Business Services has taken a hands on approach in the following ways:

1. Travel Process: individual training on all travel procedures, and in house processing of travel

2. Reporting: providing access to budget reports for administrators

3. Requistions: in house processing of all orders to ensure accuracy, to be aligned with District policy and procedures, and follow good accounting practices

Yes, we have seen results by having less accounting errors and process requests in a timely manner.

We will contintue these customer services proccesses.