Non-Instructional Program Review Template

What is a Non-Instructional Program?
Non-instructional programs represent all Administrative and Business Services, Student Services, and non-instructional Academic Affairs areas at BCC.

Non-Instructional Program Name
Please indicate the program name: Business Office
Academic Year: 2023-2024
Name(s) of Submitter(s): Glennis Duncan, Lorena Aguilar, Armie Caasi, Felicia Espinoza, Karli Godfrey, and Richard Mendoza

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I.   Area Description
The purpose of this section is to provide the reader and/or reviewer with a brief snapshot of the area. This section should be kept short, a few paragraphs at the most, and address the following:

A.   What is the area mission and how does it support the institutional mission?

The Business Office is dedicated to providing efficient and effective fiscal management by supporting the students, staff, faculty, departments, and outside constituents with exceptional accountability, accuracy, and compliance with regulations in a timely manner. The Business Office supports the District's mission by providing services to the faculty, staff and students in order to promote an environment conducive to student learning and success. We provide operational support for all departments which in turn allows faculty and staff to focus on the needs of the students.

B.   What is the area vision and how does it support the institutional vision?

Our vision is to seek opportunities to be more efficient of how we do business. Doing such would not only improve customer service but help with our workload. We inspire to do what is morally and ethically correct while committing to ensure rules and regulations, board policies and procedures, and guidelines are followed by the district.

C.   Please provide a short area description:
The Business Office is responsible for purchasing, accounts receivable, accounts payable, staff reimbursements, student refunds, financial aid disbursements, student scholarships, and all financial record keeping and reporting for the funds of the District including general fund, fiduciary funds, special projects, capital projects, foundation, and categorical grants.

D.   How does your area align to and/or support one or more of the following BCC Strategic Priorities?
The Business Office is committed to achieve equitable student success by ensuring that student financial aid and scholarship disbursements are processed in an efficient and timely manner. The Business Office also supports Special Programs and Services which provides access and support to educationally disadvantaged students, HHIP Grant fund distributions to ensure that the needs are met for any students facing homelessness or housing insecurities, assist the Athletics department to ensure

that transportation and meal allowances are provided for our athletes, and assist the Associated Student Government (ASG) to support programs and activities to ensure student success and happiness.

The Business Office is committed to achieving sustainable excellence in all operations. The staff complies with all budget and resource allocations while striving to provide fiscal services to the District in a timely and efficient manner. Assistance is given to categorical funds to create a streamlined grants process.

- Innovate to Achievable Equitable Student Success
- Ignite a Culture of Learning and Innovation
- Build Community
- Achieve Sustainable Excellence in all Operations

II. Area Effectiveness

The purpose of this section is to evaluate the area holistically by reviewing and analyzing data within the context of serving the area's internal and external customers, helping students reach their goals, and furthering the mission of BCC.

For each item below, review the data provided. As you examine the data, be on the lookout for trends and outliers.

Provide a short analysis (2-3 sentences) for each item. If data are not available (i.e., student satisfaction surveys), please indicate that on the form.

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Customers

Demographics of internal and external customers – who do you serve?

> The Business Office serves BCC students, employees, all departments on campus and at Fort Irwin, outside agencies and vendors, and Barstow College Foundation.

Policies and Process Response

What recent changes in policies, procedures and processes have impacted or will impact your Service Area or Administrative Unit (BCC BP/AP; Federal, State & local regulations; guidelines). Describe the effect the changes or updates in policies and processes have had on the unit.

> The Business Office did not have a previous debt write-off policy or procedure. An internal procedure has been recently created to streamline the process.

What in-house policies, procedures, and processes need to be updated, created, or deleted?

> The Business Office needs to create a procedure for annual student debt write off to ensure that the process is streamlined and efficient.

Collaboration with Other Areas Response

What areas and/or administrative units are integral to the work of your area and why? Please provide examples of collaborating with other areas on projects, process improvement, etc.

> Financial Aid, Administrative Services, Information Technology, and Maintenance and Operations, are integral to the work of the Business Office. Our office relies on Financial Aid data in order to process student financial aid and scholarships in a timely manner based on the semester distribution schedule. Administrative Services provides the budget for which we are able to support the District through financial services such as purchasing and accounts payable. IT is integral to our work for technology updates and access, student reports, and threat prevention. M&O receives all orders placed by the Business Office Purchasing Technician and inputs items received into Financial 2000 in order for Accounts Payable to be able to process invoices to vendors.

What other areas have you worked with? Please provide examples of collaborating with other areas on projects, process improvement, etc.

> The Business Office collaborates with Financial Aid, Special Programs and Services, and Academic Affairs on a continuous basis. The Accounting Technician II balances student financial aid data in Banner in order for Financial Aid to continue to support students with Federal and State awards. Special Programs and Services requires the Business Office's assistance to support the students by purchasing food supplies for events, gas and food gift cards, noninstructional supplies, and processing payments to vendors for printing, bookstore purchases, and child care. The Business Office supports Academic Affairs by processing faculty reimbursements as related to instruction or travel for professional development, Library materials, classroom supplies, licensing fees, and equipment.

What other areas do you want or need to work with more and why?

> The Business Office needs to continue to work with Athletics to ensure that transportation to sporting events is processed efficiently and that referees for home games are paid in a timely manner. Our office created a data analysis report for Athletics to process for each sport for the 2023-2024 year to ensure that the referees are paid within seven days of a game. Staff is working on a procedure for

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checking out new gas cards for team drivers and submitting receipts for processing on a weekly basis.

Staffing

Area Organization – state any changes in past few years
> The Business Office hired a Director of Fiscal Services in February 2023 after having been without that position being filled for approximately two years.
> The Accounts Payable position was filled in November 2022 after having a substitute in that position for one year.
> The Accounting Assistant position is currently occupied by a substitute since November 2022 when it was left vacant by the employee who assumed the Accounts Payable position.

Please list any professional development that staff has participated in (Standard 3.2)
> Staff has not participated in any professional development due to the Director of Fiscal Services position being vacant.

Please list any professional development staff would benefit from (Standard 3.2)
> Staff has requested training on time management, Microsoft Office Suites and Banner software to assist with timely and efficient year end, accounts payable, purchasing, and student financial aid disbursement processing.

Do staff receive an annual employee evaluation on a regular basis (Standard 3.3)? If no, please explain.
> The Director of Fiscal Services has completed all staff evaluations based on the annual schedule provided by Human Resources.

Is the staffing within the department sufficient to meet all responsibilities in a timely manner and support internal and external customers adequately (Standard 2.7)?
> No, the Business Office would benefit from an additional Accounting Technician I to assist with timely accounts payable processing by splitting the vendors alphabetically and to provide backup to purchasing for increased supplies and event orders due to increased categorical funding.

Area Effectiveness Data and Analysis

Satisfaction Surveys
> The Business Office has not previously sent out satisfaction surveys but encourages feedback from students regarding financial aid disbursements. The Purchasing Technician requests information from District staff regarding supply or event orders, specifically if orders are not delivered on time or complete.

Audits, project tracking, etc.

The Business Office provides data to the auditing firm twice a year during the process of the interim audit (March-April) and final audit (September-November). The 2021-2022 audit produced a clean opinion with no findings in the financial area. Audited financial statements are posted to the website and can be found here: https://www.barstow.edu/about-bcc/administrative-services/businessfiscal-services/audits

Student Equity Data

Specifically discuss any equity gaps that have surfaced in the data. What innovative plans or projects will help to close these gaps?

The Business Office assists students with financial aid but there aren't any innovative plans to close equity gaps.

Institution-set Standards

If applicable, reflect on how the department/unit assists the college in reaching the institution-set standards and stretch goals. What innovative plans or projects will help to address any deficiencies.

The Business Office assists the college in reaching the institution-set standards and stretch goals by processing financial aid and scholarship disbursements to ensure that students have the resources needed to complete their courses and obtain the desired ceritificates or degrees.

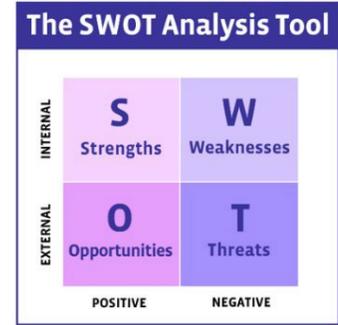Other Supporting Data (Qualitative or Quantitative)

The Business Office created 1,123 purchase orders for 2022-2023 fiscal year and all but 112 were closed at year end and rolled into current liabilities. 76% of the 112 have been processed in the 2023-2024 year. Additionally, 734 accounts payable transmittals were processed in 2022-2023 with multiple vendor payments per transmittal.

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SWOT Analysis

Conducting a SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats) is another tool that can help areas evaluate themselves. The SWOT Analysis not only looks internally, but externally as well.

The SWOT Analysis provides a way for areas to highlight their accomplishments and also identify possible gaps or issues that need to be addressed.

	Positive/ Helpful	Negative/ Harmful
Internal	STRENGTHS 1. Knowledgeable and dedicated team members. 2. Most transactions are processed quickly and efficiently. 3. Financial Aid and Scholarship disbursements are processed timely per the Distribution distribution schedule. 4. Business Office receives a clean audit opinion annually. 5. Professional experts assisted the Business Office during vacant staff positions.	WEAKNESSES 1. Staff has requested training due to continuous changes to County software and Office Suites plus training using Banner / Argos. 2. Follow up on invoices received that do not have the proper documentation. 3. Cost of professional experts needed during training process.
External	OPPORTUNITIES 1. Crosss training with staff to assist during time off schedules. 2. Professional development / training to support updated systems. 3. Increase lower level staff to relieve employee work loads.	THREATS 1. County auditing vendor transmittals submitted causing late payments. 2. Fraudulant check activity. 3. More fiscal oversight requirements for new state funding.

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III. Goals and Service Area Outcomes (SAOs)/Administrative Unit Outcomes (AUOs)

The purpose of this section is to use data to develop goals, expected SAOs/AUOs for the next three years, and to reflect upon goals and outcomes from the previous cycle

You should reflect on and incorporate the responses from all the previous questions and the SWOT analysis into this section.

As you develop goals and outcomes:

    a. *formulate **two to three goals with an expected outcome for each** that will help maintain or enhance program strengths or will act as an intervention to an identified weakness (cite evidence from assessment data and/or other area effectiveness data).*

    b. *indicate the **status** of the SAO/AUO (ex: is the goal or outcome new, a carry-over from the previous program review cycle, etc.)*

    c. *indicate how each goal and outcome are **aligned** with the College's* Strategic Priorities.

    d. *indicate how each goal and outcome are **aligned** with the Pillars of Guided Pathways.*

    e. *List at least one **action/strategy** for each goal/outcome.*

    f. *Explain how you will **measure** the goal/outcome.*

    g. *List any **resources** that will be needed to achieve the goal/outcome*

GOAL #1

To increase the efficiency of the Business Office to ensure District departments have the resources they need to function.

    Expected Service Area Outcome/Administrative Unit Outcome
    AUO #1 Student financial aid and scholarships are distributed in a timely manner.
    AUO #2 Purchasing process for instructional materials and/or events is streamlined.
    AUO #3 Reimbursement process for travel/professional development is streamlined.
    AUO #4 Accounts payable processes payments on time without incurring past due charges.

    A. This Goal/Outcome is

        ☒   New

        ☐   Continued

        ☐   Modified

        If modified please list how and why.
        Click or tap here to enter text.

    B. Alignment to BCC Strategic Priority *(Select at least one but choose all that apply)*
    Strategic Priority 1: Innovate to Achieve Equitable Student Success

    Strategic Priority 3: Build Community

    Strategic Priority 4: Achieve Sustainable Excellence in all Operations

    Choose an item.

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C. Relationship to Guided Pathways

☐ Clarify the Path

☐ Entering the Path

☒ Staying on the Path

☒ Support Learning

D. Please list actions/strategies for achieving this goal/outcome.
AUO #1 Action/Strategy: Implement employee training on Banner
    Task: Identify employees needing training
    Task: Identify specific Banner features to develop training
    Task: Schedule training blocks and assign employees
AUO #2 Action/Strategy: Develop purchasing guidelines and training for instructional materials and categorically funded events
    Task: Collaborate with Academic Affairs and Categorical programs to outline processes.
    Task: Collaborate with Academic Affairs and Categorical programs to design training modules.
AUO #3 Action/Strategy: Develop travel/professional development reimbursement guidelines and support for faculty and staff
    Task: Collaborate with HR to outline travel and professional development reimbursement processes and guidelines.
    Task: Refer to Board Policies and Administrative Procedures to develop reimbursement processes and guidelines.
    Task: Update Administrative Procedures if necessary
AUO #4 Action/Strategy: Provide cross training and oversight of Accounts Payable processes
    Task: Develop SOPs of all Accounts Payable processes
    Task: Determine with staff members require cross-training
    Task: Schedule time blocks for staff training

E. Briefly explain how you will measure the goal/outcome.
AUO #1 Measurement: Meet distribution timelines
AUO #2 Measurement: Completion of purchasing process in a timely manner
AUO #3 Measurement: Completion of employee reimbursements in a timely manner
AUO#4 Measurement: Payments are processed by set deadlines

F. Please list resources (if any) that will be needed to achieve the goal/outcome.
1. Staffing: Create position and hire an additional Accounting Technician I to support Accounts Payable and Purchasing. Classified employee position that will be hired based on the Classified Salary Schedule at Level 17 plus benefits
2. Training/Professional Development
3. Time for Cross Training
4. Additional monitors to assist staff with their production capabilities.

GOAL #2

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Click or tap here to enter text.

Expected Service Area Outcome/Administrative Unit Outcome

Click or tap here to enter text.

G. This Goal/Outcome is

☐   New

☐   Continued

☐   Modified

If modified please list how and why.
Click or tap here to enter text.

H. Alignment to BCC Strategic Priority *(Select at least one but choose all that apply)*
Choose an item.

Choose an item.

Choose an item.

Choose an item.

I. Relationship to Guided Pathways

☐   Clarify the Path

☐   Entering the Path

☐   Staying on the Path

☐   Support Learning

J. Please list actions/strategies for achieving this goal/outcome.
Click or tap here to enter text.

K. Briefly explain how you will measure the goal/outcome.
Click or tap here to enter text.

L. Please list resources (if any) that will be needed to achieve the goal/outcome.
Click or tap here to enter text.

GOAL #3

Click or tap here to enter text.

Expected Service Area Outcome/Administrative Unit Outcome

Click or tap here to enter text.

M. This Goal/Outcome is

☐ New

☐ Continued

☐ Modified

If modified please list how and why.
Click or tap here to enter text.

N. Alignment to BCC Strategic Priority *(Select at least one but choose all that apply)*
Choose an item.

Choose an item.

Choose an item.

Choose an item.

O. Relationship to Guided Pathways

☐ Clarify the Path

☐ Entering the Path

☐ Staying on the Path

☐ Support Learning

P. Please list actions/strategies for achieving this goal/outcome.
Click or tap here to enter text.

Q. Briefly explain how you will measure the goal/outcome.
Click or tap here to enter text.

R. Please list resources (if any) that will be needed to achieve the goal/outcome.
Click or tap here to enter text.

Previous Goals/Outcomes
Were any outcomes discontinued or completed? Please speak to outcomes you are not carrying forward from the previous program review cycle and discuss why.
There haven't been any Program Reviews completed by the Business Office since 2016. The last three goals from 2016 have been completed.
1. Relocate/increase office space – The layout of the office space has been significantly improved with the purchase of new staff work stations that are strategically placed to limit disruption.
2. Aimplement Affordable Care Act reporting requirements – All reporting requirements have been implemented through the payroll department and all penalties avoided.

3. Refund student scholarships upon receipt of funds – Once a student scholarships deposit has cleared, the student's enrollment is verified and funds are distributed based on the donor's request.

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IV. Resource Requests

What does the area need to meet its goals and outcomes? Resource requests should be evidence-based and tied to goals and objectives stated above.

Resources may be requested from the following categories:

    a. *Personnel/Staffing*
    b. *Technology Resource*
    c. *Facilities Resource*
    d. *Professional Development*
    e. *Other*

For all resource requests departments/areas should utilize the <u>Budget Allocation Proposal form</u> and submit with their program review. If needed, the Out-of-Cycle BAP form may be submitted for resource requests when completing an Annual Update in Years 2 and 3.

Goal/ Outcome #	Resource Required	Estimated Cost	BAP Required? Yes or No	If no, indicate funding source
1	a. Personnel/Staffing: Accounting Tech I position	$ 47,316 annual salary + $21,000 in estimated benefits.	Yes	Click or tap here to enter text.
1	b. Technology Resource: Additional monitors for each staff member of the Business Office.	$875 estimated for 6 monitors (tax included)	Yes	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
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