

Non-Instructional Program Review- Annual Update Template

Service Area/Administrative Unit

Non-Instructional Program Name: Business Office

Academic Year: 2025-2026

Name(s) of Submitter(s): Terri Walker, Lorena Aguilar, Armie Caasi, Alicia Felton, Richard Mendoza, Jamie Tennyson

Annual Update #1 #2

**Note: An Annual Update must be submitted each year that a Program Review is not submitted.*

I. Progress on Goals and Outcomes (SAOs/AUOs)

A) List the 2-3 goals and related outcomes for your unit:

(These should be carried forward from your full Program Review, or from your Annual Update #1 if revised since your full Program Review)

1. GOAL #1

Create a more efficient and manageable process for student financial aid distribution.

Expected Service Area Outcome/Administrative Unit Outcome

Strategic Priority 1: Innovate to Achieve Equitable Student Success

Strategic Priority 3: Build Community

Strategic Priority 4: Achieve Sustainable Excellence in all Operations

2. GOAL #2

Enhance purchasing and accounts payable efficiency by adding an additional Accounting Technician I position.

Expected Service Area Outcome/Administrative Unit Outcome

Strategic Priority 1: Innovate to Achieve Equitable Student Success

Strategic Priority 3: Build Community

Strategic Priority 4: Achieve Sustainable Excellence in all Operations

3. GOAL #3

Click or tap here to enter text.

Expected Service Area Outcome/Administrative Unit Outcome

Click or tap here to enter text.

B) Have any goals been completed or discontinued?

If yes, please list the goal and whether it has been completed or discontinued; if

Non-Instructional Program Review- Annual Update Template

discontinued, please explain why.

Yes No

Goal #2: Enhance purchasing and accounts payable efficiency by adding an additional Accounting Technician I position. Our new Accounting Technician I position was created and filled 6/2/25.

C) Discuss the actions/strategies related to each goal and your progress on each of these. If you have not begun an(y) action/strategy please list why.

1. GOAL #1 Action/Strategies

- 1) Focus on cross training between the two Accounting Technician II positions.
- 2) Use SOPs to identify training needed.
- 3) Work with the Financial Aid Department to transfer student aid information to meet the outlined deadlines.

Discuss any progress on Action/Strategies.

- 1) We have filled the vacant Accounting Technician II position by promoting Richard.
- 2) Armie is creating SOPs for financial aid disbursements.
- 3) Cross training will commence in September once Richard returns from family leave.
- 4) We will then be able to work more closely with Financial Aid to streamline the process.

Briefly explain how you have been measuring the goal and any notable indicators of forward progress.

- 1) The switch to Bank Mobile has streamlined the process for financial aid refunding. We continue to work on SOPs with the new process.

2. GOAL #2 Action/Strategies

- 1) Add an additional Accounting Technician I position.
- 2) Cross train employees to better understand how Purchasing and Accounts Payable functions support each other.
- 3) Utilize a quarterly checklist to streamline year-end closing processes that rely on Purchasing and Accounts Payable.

Discuss any progress on Action/Strategies

- 1) We have filled the additional Accounting Technician I position.
- 2) Our cross training action has been accelerated by the need to have Jamie work out of class for Richard as he is on family leave. We are creating SOPs as part of this strategy.
- 3) We have been using the quarterly and year-end checklists to streamline year-end closing processes.

Briefly explain how you have been measuring the goal and any notable indicators of forward progress.

- 1) The Aging Report is being used to track payments and shows an improvement in timely payments. 2) The open encumbrance report is being utilized to close purchase orders

Non-Instructional Program Review- Annual Update Template

no longer needed on a quarterly and year-end basis. 3) Additionally, the quarterly and year-end checklists have been good tools for seeing tasks that can streamline the year-end closing processes.

4) GOAL #3 Action/Strategies

Click or tap here to enter text.

Discuss any progress on Action/Strategies

Click or tap here to enter text.

Briefly explain how you have been measuring the goal and any notable indicators of forward progress.

Click or tap here to enter text.

D) List any resources you are requesting for each goal.

1. Goal 1 Goal 2 Goal 3

Please list the resource and how it relates to the goal.

Click or tap here to enter text.

2. Goal 1 Goal 2 Goal 3

Please list the resource and how it relates to the goal.

Click or tap here to enter text.

3. Goal 1 Goal 2 Goal 3

Please list the resource and how it relates to the goal.

Click or tap here to enter text.

II. New Goals (optional)

This section is optional and should be used to replace a completed or discontinued goal OR if a new goal has become necessary for the service area or administrative unit.

A. NEW GOAL #1

Improve efficiency, consistency, and service quality in Purchasing and Accounts Payable by implementing cross-training, expanding professional development, and institutionalizing standard operating procedures.

Expected Service Area Outcome/Administrative Unit Outcome

1) AUO #1:

Staff in Purchasing and Accounts Payable will demonstrate increased proficiency and role coverage, with at least two team members cross-trained to complete all core

Non-Instructional Program Review- Annual Update Template

purchasing and invoice processing tasks independently.

2) **AUO #2:**

The Business Office will maintain and annually update Standard Operating Procedures (SOPs) for Purchasing and Accounts Payable functions, with tasks documented and reviewed as part of year-end close.

3) **AUO #3:**

Professional development participation will increase, with each staff member attending at least one relevant external training, conference, or webinar annually to support improved efficiency and regulatory compliance.

1. 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.

2. Relationship to Guided Pathways

- Clarify the Path
- Entering the Path
- Staying on the Path
- Support Learning

3. Please list actions/strategies for achieving this goal/outcome.

- 1) **Implement cross-training plans** that ensure at least two staff members are proficient in all key Purchasing and Accounts Payable functions, including requisition processing, invoice matching, vendor setup, and PO closeout. 2) **Expand professional development participation** by supporting staff attendance at CASBO trainings, CollegeBuys conferences, and relevant webinars, with a focus on procurement compliance, process improvement, and ERP systems. 3) **Develop and maintain a quarterly reconciliation checklist** to improve consistency and accuracy in Purchasing and AP workflows, including open encumbrance review, aging reports, and purchase order closures. 4) **Document and institutionalize Standard Operating Procedures (SOPs)** for all core Purchasing and AP processes, and review/update them annually as part of fiscal year-end closeout planning.
- 2) Briefly explain how you will measure the goal/outcome.
- 1) **Payment Timeliness Tracking:**
The *Aging Report* will be reviewed monthly to ensure that at least 90% of vendor

Non-Instructional Program Review- Annual Update Template

invoices are paid within 30 days of receipt, with a reduction in past-due charges over time. 2) **Encumbrance and PO Review:**

The *Open Encumbrance Report* will be reviewed quarterly and at year-end to identify and close outdated purchase orders. Progress will be measured by tracking the number of open POs closed within the quarter. 3) **Process Consistency & Efficiency:**

A *Quarterly Checklist* will be maintained and completed each quarter to track Purchasing and AP tasks (e.g., PO reconciliation, invoice processing timelines, outstanding vendor issues). Completion of the checklist will be used to assess adherence to SOPs and reveal process gaps. 4) **SOP Implementation & Review:**

All key SOPs for Purchasing and AP functions will be finalized, shared with staff, and reviewed annually. A log will be maintained to document revisions, staff acknowledgment, and training alignment. 5) **Professional Development Participation:**

Participation in at least one external professional development activity (e.g., CASBO, CollegeBuys, or CCCCQ webinars) will be tracked per staff member annually, with outcomes incorporated into performance evaluations or year-end reflections.

3) Please list resources (if any) that will be needed to achieve the goal/outcome.

We request funding to send four staff members to the 2026 CollegeBuys Purchasing Conference. Based on 2025 rates, estimated total cost is **\$7,163**, covering registration, lodging, per diem, and travel. Final adjustments will be made once 2026 rates are confirmed. We also request funding for CASBO membership which will allow district staff to participate in additional professional development.

B. NEW GOAL #2

Click or tap here to enter text.

Expected Service Area Outcome/Administrative Unit Outcome

Click or tap here to enter text.

4) 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.

5) Relationship to Guided Pathways

- Clarify the Path
- Entering the Path
- Staying on the Path

Non-Instructional Program Review- Annual Update Template

Support Learning

6) Please list actions/strategies for achieving this goal/outcome.

Click or tap here to enter text.

7) Briefly explain how you will measure the goal/outcome.

Click or tap here to enter text.

8) Please list resources (if any) that will be needed to achieve the goal/outcome.

Click or tap here to enter text.

Non-Instructional Program Review- Annual Update Template

III. Resource Requests:

What does the area need to meet its goals and objectives?

List all resources from Sections I.D and II.10 below.

If there was no room on the template to list all resources being requested for a single goal/objective, you may list additional resource requests here. Also list any resources required to implement planned improvements.

IMPORTANT: A BUDGET ALLOCATION PROPOSAL must be completed and submitted for **EACH** new resource requested.

Goal/ Outcome #	Resource Required	Estimated Cost	BAP Required? Yes or No	If no, indicate funding source
2/AUO#3	2026 CollegeBuys Purchasing Conference	\$7,163	Yes	Click or tap here to enter text.
2/AUO#3	CASBO Membership	\$850	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.
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.

BUDGET ALLOCATION PROPOSAL

Date: <u>7/31/25</u>	Originator: <u>Terri Walker</u>		
Program or Department Name: <u>Business Office</u>			
Dean/Vice President/Supervisor: <u>Deedee Garcia, VP</u>			
What are you requesting? <i>(Brief)</i> <u>Professional Development Funding – CollegeBuys Conference & CASBO membership</u>			
Amount Requested: <u>\$8,013</u>	<input type="checkbox"/> One-time Funding <input checked="" type="checkbox"/> Ongoing Funding		
Funding Source (if known):			
REQUEST TYPE:			
<input type="checkbox"/> Personnel/Staffing <i>Complete Personnel/Staffing section below</i> <input type="checkbox"/> OTHER	<input type="checkbox"/> Technology Resource <i>Complete Technology section below</i>	<input type="checkbox"/> Facilities Resource <i>Complete Facilities section below</i>	<input checked="" type="checkbox"/> Professional Development <i>Complete Professional Development section below</i>

PERSONNEL/STAFFING REQUEST			
Is the position request for:	<input type="checkbox"/> Faculty	<input type="checkbox"/> Classified	<input type="checkbox"/> Management/Confidential
Is the position requested:	<input type="checkbox"/> A new classification (Attach <i>proposed</i> job description, or <i>detailed</i> list of proposed duties)		
	<input type="checkbox"/> An existing classification <i>Official Job Title:</i> _____		
Is the position requested:	<input type="checkbox"/> Full Time	<input type="checkbox"/> Part Time:	_____ Months/Year _____ Hours/Week

TECHNOLOGY RESOURCE REQUEST					
Indicate the category of the request:					
<input type="checkbox"/> Hardware	<input type="checkbox"/> Software	<input type="checkbox"/> Printer/Copier	<input type="checkbox"/> Network	<input type="checkbox"/> Audio-Visual	<input type="checkbox"/> License/Maintenance
Indicate the intended users:		<input type="checkbox"/> Students	<input type="checkbox"/> Faculty	<input type="checkbox"/> Staff	<input type="checkbox"/> Other
Is training required?	<input type="checkbox"/> No	<input type="checkbox"/> Yes	Explain: _____		
How will it be secured?	<input type="checkbox"/> Alarm	<input type="checkbox"/> Secure Room	<input type="checkbox"/> Secure Cabinet	<input type="checkbox"/> Cable/Lock	<input type="checkbox"/> Password
Have you completed and attached the Technology Assessment Form ?					

FACILITIES RESOURCE REQUEST					
Indicate the intended users:		<input type="checkbox"/> Students	<input type="checkbox"/> Faculty	<input type="checkbox"/> Staff	<input type="checkbox"/> Other
Is maintenance required?	<input type="checkbox"/> No	<input type="checkbox"/> Yes	Explain: _____		

BUDGET ALLOCATION PROPOSAL

PROFESSIONAL DEVELOPMENT REQUEST

Indicate the intended users: Students Faculty Staff Other

Do other internal areas/departments need to be involved?

No Yes Explain: _____

Is technology needed? No Yes Explain: _____

1. Why is the request being made?

With the addition of the new Accounting Technician I position, hiring two new staff members and the promotion of one staff member, the department has an increased need for professional development offered by the CollegeBuys Purchasing Conference and the CASBO organization.

2. a) Where in the Program Review/Annual Update is the request supported? Include the text from the Program Review AND cite the applicable section number(s).

Section II. A. AUO#3. Professional development participation will increase, with each staff member attending at least one relevant external training, conference, or webinar annually to support improved efficiency and regulatory compliance.

b) Explain how the request is supported with information gathered from the assessment of outcomes (Student Learning Outcomes, Program Level Outcomes, Service Area Outcomes, or Administrative Unit Outcomes).

Analysis of quarterly checklists, staff coverage reports, and payment timelines has highlighted the need for targeted training in procurement compliance, invoice management, and ERP system navigation. The CASBO organization and CollegeBuys Conference directly support this outcome by offering training aligned with our responsibilities and current compliance challenges.

By tying training to these findings, we aim to ensure that all staff members not only attend external training annually but also apply what they've learned to SOP improvement and more efficient fiscal operations. This directly supports Goal #2 in our Program Review and enhances long-term sustainability.

c) How was this included in the Area Goals section of your Program Review? Please cite section/item number and include the text.

This request is included under New Goal #1 in our 2025–2026 Program Review (Section II), which states:

“Improve efficiency, consistency, and service quality in Purchasing and Accounts Payable by implementing cross-training, expanding professional development, and institutionalizing standard operating procedures.”

The related Administrative Unit Outcome #3 specifies:

“Professional development participation will increase, with each staff member attending at least one relevant external training, conference, or webinar annually to support improved efficiency and regulatory compliance.”

BUDGET ALLOCATION PROPOSAL

Additionally, under Actions/Strategies, we note our intent to:

“Expand professional development participation by supporting staff attendance at CASBO trainings, CollegeBuys conferences, and relevant webinars, with a focus on procurement compliance, process improvement, and ERP systems.”

This request directly supports these goals by providing staff with access to high-quality external training aligned to their job functions and the department’s operational improvement priorities.

3. If this item is approved, what departments or resources are needed, or would be affected, when implementing or developing it, on both a short-term and a long-term basis? Have they been notified?

Example: [Technology Assessment Form](#)

(This question is not required for Personnel/Staffing requests.)

No other departments or resources are affected by this request. The training and professional development activities are specific to Business Office staff, and no additional support from internal departments is required for implementation in the short or long term.

4. a) How will this resource improve student success or institutional services?

This request will improve institutional services by increasing the operational efficiency, accuracy, and responsiveness of the Business Office—particularly in the areas of Purchasing and Accounts Payable. As staff attend targeted training (e.g., CASBO, CollegeBuys), they will gain updated knowledge of procurement regulations, financial compliance requirements, and system process improvements.

These improvements reduce delays in processing purchase orders and vendor payments, which directly impacts the timeliness of instructional supplies, student services purchases, and categorical program support. When fiscal operations run smoothly, campus departments are better positioned to meet student needs efficiently, thereby contributing to overall student success.

b) What data will you gather and analyze to demonstrate that your proposal is meeting this goal(s)?

We will track the following data:

- **Training participation logs** showing that each staff member attends at least one external training annually.
- **Improvement in invoice processing timeliness**, as documented in the monthly Aging Report.
- **Quarterly checklist completion** to demonstrate SOP adherence and identify areas improved through training.
- **Staff feedback/reflection surveys** following training events to assess knowledge gained and application to daily duties.

These indicators will help us evaluate whether professional development is contributing to enhanced service delivery and institutional efficiency.

5) Describe how your request is aligned with as many of the college’s strategic planning documents as applicable. (If the request does not align with a document, indicate N/A.)

BUDGET ALLOCATION PROPOSAL

Please be specific and provide detail, ensuring a clear correlation between content of referenced document and the request. Cite the section and page numbers where the correlation can be found.

(Follow the links to access each document)

1. [Mission Statement](#)

This request supports the college's mission to provide high-quality educational services by ensuring that the Business Office operates efficiently and effectively. Timely purchasing and payment processing enable instructional and student support services to receive needed resources, directly contributing to student success.

2. [Strategic Priorities / Strategic Goals](#)

Strategic Priority 1: Innovate to Achieve Equitable Student Success

By improving the timeliness and accuracy of procurement and accounts payable functions, campus departments receive the tools and resources they need to support student achievement and equity initiatives.

Strategic Priority 4: Achieve Sustainable Excellence in All Operations

Professional development and cross-training build staff capacity, ensure continuity of service, and foster sustainable practices, which align directly with the goal of operational excellence.

3. [Educational Master Plan](#)

The EMP emphasizes operational support that enables teaching and learning. This proposal aligns by ensuring that back-end processes—procurement, accounts payable, and vendor management—are handled with efficiency and accuracy, freeing instructional programs to focus on student outcomes. (EMP, Section on Institutional Effectiveness, p. X)

4. Others: Such as [Technology Plan](#) , [Facilities Master Plan](#), [HR Staffing Plan](#), [Professional Development Plan](#)

Professional Development Plan

The request aligns with the college's Professional Development Plan by encouraging staff to participate in targeted, role-specific training (CASBO, CollegeBuys) that enhances their ability to serve the campus community effectively.

BUDGET ALLOCATION PROPOSAL

ADMINISTRATIVE USE

Administrator: _____ Title: _____

Comments/Recommendations:

Signature: _____ Date: _____

Administrator: _____ Title: _____

Comments/Recommendations:

Unit Priority Ranking: _____ of _____

BUDGET INFORMATION

*(This section **MUST** be completed)*

Budget Program Number: _____ Restricted Unrestricted

Comments regarding Budget Information: _____

Signature: _____ Date: _____