



LOS RIOS

COMMUNITY
COLLEGE
DISTRICT

Los Rios CCD

2012-2013 PROGRAM REVIEW

SUPPORT SERVICES

Unit: District Business Services

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I. Program Review Purpose

Definition of a Support Services Unit

For the purposes of this program review document, a support services unit is defined as a District department which is responsible for providing services throughout the District in a manner which creates and maintains an optimal learning environment for students and/or provides the necessary services to support the overall operation of the District and colleges.

Program Review Purpose

The purpose of review is to evaluate the quality of the support services provided and to use the information from the evaluation to plan program improvements. Regular program reviews are required to meet regional accreditation requirements, state requirements, and best practices. ACCJC Accreditation Standard I.B states,

The institution demonstrates a conscious effort to produce and support student learning, measures that learning, assesses how well learning is occurring, and makes changes to improve student learning. The institution also organizes its key process and allocates its resources to effectively support student learning. The institution demonstrates its effectiveness by providing 1) evidence of the achievement of student learning outcomes and 2) evidence of institution and program performance. The institution uses ongoing and systematic evaluation and planning to refine its key processes and improve student learning.

Support services units are expected to undergo a full review every three years.

Relationship of Program Review to Unit Plans

When completed, this Program Review document should provide the following to support your annual Unit Plan document:

- Unit mission statement
- Purpose statement that identifies how your unit supports creation and maintenance of an optimal student learning environment and/or provides the necessary services to support the overall operation of the District and colleges
- Findings to justify continuing or changing current operating procedures
- Justifications for requesting new resources

Program Review Due Dates

All departments must be reviewed at least once every three years during the year cited on the LRCCD Support Services Program Review Cycle. Reviews are due by June 30th of the year in which they are reviewed. A copy of the review will be maintained in the unit and the Office of Education and Technology.

Mission Statement

Provide your **unit's mission statement** below. Your statement must align with the District mission statement and should match your mission statement in your unit plan.

For reference, the following are LRCCD's Vision and Mission statements:

Vision Statement

We, the Los Rios community colleges, provide outstanding programs and services so that all students meet and exceed their educational, career, personal and social goals. We meet the social and economic needs of the community.

Mission Statement

Relying on their professional and organizational excellence, the Los Rios community colleges:

- Provide outstanding undergraduate education, offering programs that lead to certificates, associate degrees, and transfer;
- Provide excellent career and technical educational programs that prepare students for job entry and job advancement through improved skills and knowledge, including the demands of new technologies;
- Provide a comprehensive range of student development programs and services that support student success and enrich student life;
- Provide educational services that address needs in basic skills, English as a second language, and lifelong learning; and
- Promote the social and economic development of the region by educating the workforce and offering responsive programs such as service learning, business partnerships, workforce literacy, training, and economic development centers.

Enter your mission statement in the self-expanding text box below.

Honoring the District's core value of financial stability through the careful management of resources while providing the best service possible to our students, faculty, staff and community.

III. Unit Responsibilities

List your unit's **primary assigned responsibilities**, including those related to creating and supporting an optimal student learning environment and/or the overall operation of the District and colleges. Also identify any major projects your unit is expected to support on a periodic basis (e.g. opening of new facilities, IT infrastructure upgrades, etc.).

District Business Services consists of the following departments: Fiscal Services, Accounting Services, Accounts Payable, Payroll, Employee Benefits and Grants and Contracts and Internal Audit. The unit is responsible for processing almost all financial transactions of the District and has oversight for any not processed directly. In addition, all financial and attendance reporting, both internal and external, occurs through the unit as well as most compliance reporting. Each department within the unit has its own primary responsibilities as indicated by the title. Fiscal Services specifically has responsibility for budgeting which includes position control. Accounting Services is responsible for tracking financial aid disbursements and the District's Foundation accounting as well as all other accounting functions such as cash management and financial reporting. The departments each play a vital role in supporting the learning environment through timely and accurate processing of transactions as well as providing good service to the college and other district support functions.

List those **district and college** operating units your unit must interact with on a regular basis in order to complete the primary responsibilities of your unit. Briefly describe the types of interaction you have with the listed units.

The unit interacts with the following areas on a daily basis as part of the normal course of business. The interactions can run from the routine question regarding verifying receipt for accounts payable to more exceptional questions such as arise when implementing a change in law or regulation.

College Business Services Offices: review of new processes or changes to processes, solicit input to any issues that may need resolution and affect the college financial operations. Provide support by helping address issues that arise.

College Instruction Offices: respond to questions regarding the scheduling of classes; provide information regarding utilization of instructors and other faculty; assist with budgeting questions. Provide support for edits and program modifications.

College Student Services Offices: respond to questions regarding student enrollment; provide reporting regarding counseling utilization;

Human Resources: maintain strong working relationships and open communications. Review processes that affect HR and a Business Services department.

IT: Solicit request for user support and implementation of new programs or processes. Serve as advocate for college business services offices. Review security for systems and provide recommendations to strengthen

FM: direct support for budget and accounting; work with staff and administrators regarding funding for projects.

Purchasing: Work together to ensure smooth processes to pay vendors as timely as possible

Grants and Special programs: Assist program staff with fiscal tracking and reporting; serve as liaison with granting agencies.

IV. Relevancy

Briefly describe why your unit's work is **relevant to the institution** with respect to how it supports an optimal student learning environment and/or overall operation of the District and colleges. State the reasons you expect the need for this program to continue.

District Business Services exists solely to support the District's mission of student success and access. The District is no different than any entity in that it requires resources in order to function. Business Services ensures those resources are in place through its role in budgeting and accounting for the District's resources. Business Services provides support to the Colleges and to employees directly. Our ability to maintain efficient operations while providing quality work and services allows other employees to focus on their area be it classroom instruction, student services, or administration. We provide indirect support to students through the cash management of federal financial aid.

Each department within Business Services can cite specific ways their work is relevant to the institution and for the most part it is self-evident. What may be more important is to focus on relevancy of functions within the departments to ensure that what is required from the colleges and other areas is always necessary. This is a component of the review.

V. Currency

Describe the ways in which your unit is **current** (e.g. technology use, equipment, approaches and methodologies), or what you need to do to become and remain current over the next three years.

The legal, regulatory, and external reporting requirements are constantly changing. Staff are tasked with staying current regarding areas such as changes to attendance accounting, new Governmental Accounting Standards Board pronouncements, IRS, FTB and PERS and STRS changes as well as Federal and State compliance requirements. In addition to understanding new laws and changes in reporting, staff must implement any corresponding process changes to ensure compliance. This generally requires working with at least one other area outside of business services but in some cases more than one. In the case of employee benefits, implementation of a change in benefits can touch almost every regular employee. Staff participate on users groups for all three of the District's administrative computing systems to identify improvements, support modifications and implementation efforts. As most staff rely heavily on their desktop computers, those are routinely updated. In 2012-13, several older desktops were replaced and working with IT management, we revived the practice in place prior to the budget downturn to routinely replace a certain number of machines each year to maintain currency. The document imaging system used by some of the departments is also being upgraded. Working with IT, fiscal services upgraded its database software which it uses to support position control.

VI. Effectiveness

1. List the types of data/information you will use to **assess how effective** your unit is in completing **each** of its primary responsibilities (e.g. student/client satisfaction surveys, audits, safety inspections, facility use information, product quality and timeliness, etc.).

When presenting workshops, we include an evaluation form to solicit feedback from the attendees. We also will maintain a log of calls or emails for a given period to determine if there is a trend and maybe a specific topic that we can provide additional training on. The frequency with which issues raise to a higher level and can't be resolved at the staff/supervisor level is a good tool to evaluate how effective a department is performing. Our annual audit includes areas that need improvement, if there are any.

We use metrics such as number of audit findings, aging of receivables and payables, timeliness and accuracy of reporting both internal and external.

2. Comment on how the results of your assessments (listed in #1) **provide evidence** of your unit's effectiveness.

The responses we receive, or number of calls received on a given topic help provide evidence of our unit's effectiveness including where we can improve. While we saw a decline in our AP aging this year, the percentage under 30 days old is still relatively high at 75%. Our process for tracking AR is excellent. AR aging is more difficult to control because the State of California is the primary payor and their payments tend to be slow. We had no audit findings in 2009-10, none in 2010-11 and two audit findings for 2011-12. We complete all required reporting on or before the required due dates. Our system of position control is efficient.

3. Identify any areas you believe **need improvement now**.

We can always communicate better. We ask that communication with the colleges always include the appropriate vice president to ensure college administration is aware of any issues or problems. Sometimes though we miss identifying all stakeholders and that can add time or effort to resolution. We also need to increase training both within each unit and for the colleges. It is important for staff to understand why we do certain things, and it is a continuous process to maintain currency as well as train new staff. Documentation of procedures is always important and needs constant attention as changes are made to reflect new technology or new laws and regulations.

4. Identify any areas you believe will need improvement **to respond to expected changes** in your unit's future primary responsibilities or overall unit workload (e.g. changes created by increased enrollment, state budget allocations, additional facilities, new technologies, etc.)

Streamlining processes is always important as we grow without necessarily increasing staff. Automating processes will help, but we need to ensure staff continue to understand the basics of the transactions.

VII. Institutional Support for Unit Effectiveness

Based on your findings regarding your unit's effectiveness in meeting its primary responsibilities identify **how the District can better support** you in your improvement efforts.

The continued support of management and other internal services departments will help us continue to meet our primary responsibilities. The primary area where we will look for additional support is from information technology. In this regard IT has been a valued partner and is facilitating three areas that should improve our efficiency. The first is the purchase of a business analytics tool which will enable much more efficient analysis of enrollment trends and productivity. In addition, IT is working to improve the processing of the District's financial aid awards. Although the current system is working well, we can realize additional efficiency through further automation of some of the processing. The last area is in support of moving from a legacy cashing system to Peoplesoft cashing.

VIII. Resources Required to Improve Unit Effectiveness

Briefly summarize current resources available to your unit (e.g. staff, facilities, equipment, professional development, research data, etc.) to carry out your primary responsibilities. Identify new **resources needed** to meet or maintain program effectiveness, maintain currency, and meet anticipated growth needs. Include evidence to support your conclusions.

Our current resources include staff, facilities, and equipment. We have funding for professional development opportunities to stay current in the subjects included in our unit, software programs needed to process data, knowledge shared by others that have more experience in a given topic, etc. Since the last program review, we have reduced by two staff positions: a supervisor in our grants and contracts unit and our senior financial analyst as part of a district-wide response to funding reductions. We also have two account clerk II positions that were not filled during this timeframe but are still available.

We are planning on filling one of those two positions (accounts payable). The other position will be held for the time being. Unit workload continues to be achieved accurately and timely which is an indicator that we do not need additional staff at this time. Desktops are being replaced on a fairly regular cycle and there are no outstanding equipment requests. What we are looking to is as described above, additional improvements in efficiency and we will evaluate the distribution of assignments in fiscal year 2013-14 to ensure that any one area is not over-burdened.

IX. Recommendations

1. Based on your program review findings, **list your recommendations** to improve your unit. (Cite appropriate section of this report for each recommendation.)

Continued training to expand job knowledge and continued focus on customer service.

2. Suggestions for Improving the Program Review Process

Please provide any constructive **feedback** aimed at improving LRCCD's Program Review process, including ways in which it may be more effectively aligned with other processes at the District and colleges (strategic plan, other planning, resource allocation, etc.).

X. Appendix

1. List the **sources** you used to support this Program Review document.

Utilized the program review documents completed by two units within Business Services as well as feedback from supervisors in others.

2. Identify here the **supporting documents** (e-copies) you intend to include with your program review submittal.

Program review from Accounting Operations.