



**NON-ACADEMIC
DEPARTMENTAL REVIEW**

2022

DEPARTMENT



Non-Academic Departmental Review Self-Study

Department: Business Office

Department Head: Karla Armstrong/Kim Harrison

Submitted by: Kim Harrison

Submission Date: 01.30.2023

INSTRUCTIONS:

Complete this form using department documentation and your own observations. This self-study is designed to be a narrative document and all responses to questions should be supported by rationale, explanation and or specific documentation.

All documentation provided for the Non-Academic Departmental Review Self-Study should include the previous five years, beginning with the 2017-2018 academic year.

Adapted from Azusa Pacific University, Arizona State University, & Tyler Junior College, 2017.

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1: Non-Academic Departmental Review Participants

List the names of **your department personnel** who contributed to the writing of this report and their position/association within your department.

Name	Association/Dept Role
Karla Armstrong	VP for Administrative Services>CFO
Kim Harrison	Comptroller
Debbie Dunlap	Accounts Payable
Ruth Drees	Cashier
Jennifer Hill	Student Account Coordinator
Renee Cheramy	Administrative Assistant to Admin VP
Mindy Russell	Accounting Services and Grant Compliance Manager

2: Departmental Profile

A. Mission/Purpose

1. What is the mission of the department and how does it align with the institutional mission and other strategic priorities?
 - Mission of the Business Office is to provide the best customer service to our students, parents, faculty and staff while insuring college policies and procedures are followed. The mission of the business office supports the college's mission to produce positive contributors to the economic and social well being of society by providing information and support to our students, parents, staff, and stakeholders. The staff in the business office strive to promote unwavering integrity.

B. Human Resources

Combine all Sub-units for analysis.

1. How does the department assure that all personnel are qualified for their position?

- Through the hiring and interview process candidate's qualifications are reviewed by the interview committee prior to hiring
- Continued training in all areas is highly encouraged for each employee at least once a year

2. Include an organizational chart with names and titles.

3. List departmental, divisional, College, professional, or community committee or board activities and leadership roles, if applicable, of each full-time employee for the past **five** years.

Refund Appeal Committee – Kim Harrison, Jennifer Hill
 CampusWords – Kim Harrison, Jennifer Hill
 Leadership Academy – Kim Harrison
 Retention Committee – Kim Harrison
 Recruitment Committee – Jennifer Hill
 Calendar Committee – Jennifer Hill, Kim Harrison
 College Council – Kim Harrison
 Administrative Division - Kim Harrison
 Datacore – Kim Harrison
 Extended Sick Leave Committee – Kim Harrison

4. List names and anticipated dates of retirement (month, year) within the next five years.

NAME	MONTH	YEAR
NONE KNOWN		

5. How are the results of employee evaluations used in identifying professional development needs?

- Determined need for Professional Development calendar year 2023
 - Recommend training for each employee to attend
 - Renee – 1099 and vendor maintenance
 - Jennifer – Cash Management, Student Finance training
 - Ruth – Excel training, Setoff Training

6. What department-specific professional development opportunities are offered/provided by the department?

- Conduct purchase card training before issuing a purchase card to an employee
- Entering requisitions and purchasing policies

- Budget training
7. Show evidence that employees have continued their professional development by attaching a list of current full-time employees who participated in professional development activities during the past **five** years, and those activities.
- Kim Harrison – 1098 Webinar
 - Kim Harrison – Excel Webinar
 - Kim Harrison – 1099 Webinar
 - Kim Harrison – Nacubo Conference
 - Jennifer Hill – Nacubo Conference
 - Ruth Drees – Setoff Training

C. Description of the Department and the Customers/Clients Served

1. What are the key functions, processes and services provided by the department? Include production level data such as students/customers served, transactions processed, etc. Explain any compliance duties or responsibilities.
 - All PO's are created in the business office so employees can do business with vendors
 - All vendor payment come through the business office.
 - Purchase Cards – Monitor purchase card activity for faculty and staff. Reconcile monthly statement
 - Make sure all transactions adhere to college policy
 - 2021 processed 620 Purchase card statements totaling \$28,459.33.
 - Travel – Monitor Trip requests. Review and reconcile expense reports to receipts upon return.
 - 2021 714 Trips requests were processed
 - Cash Receipts – Receipt all cash transactions for students, clubs, ect.
 - Billing – Maintain billing and refund tables in colleague for registration. Review course fees for accuracy
 - Review all financial aid and scholarships verifying for accuracy
 - Processed
 - Issues all student refunds for excess scholarship and financial aid
 - 2021 Issued 3,954 refunds to students \$3,675,030.40
 - Process all Requisitions, PO's and payments to Vendors
 - Process Students 1098T Student Tuition Statements
2. What impact do those services have on students and other key stakeholders? What are the department's enhancements to the institution?
 - Any and all College financial transactions involve the Business Office support
3. Discuss how the department utilizes appropriate technology to provide services to its stakeholders.

- All financial data is stored in main computer system Colleague
 - NelNet/TouchNet for student payments, payment plans, and refunds
 - GiveCampus for donations and camp fundraising
4. Describe any existing continuous improvement activities.
 - Non Academic Assessments
 5. Provide any other relevant information needed for a complete understanding of your department.

3: Departmental Resources

1. Describe the overall adequacy of resources (human, technological, capital, facilities, and fiscal) available to the department for providing effective service delivery and achieving outcomes. If additional resources are needed, please provide data and describe how those resources would improve services.
 - Through the budget process we were approved an additional position that was filled June 2023 with Mindy Russell and Accounting Services and rant Compliance Manger.

Include documentation if requesting additional resources.

4: Departmental Innovation

1. Does the department engage in extracurricular activities as a service to the students and community (yes or no)?
 - Yes

If yes, list activities and explain how they benefit the students and/or community (e.g. fliers, internal department documentation)

 - Assist athletics with ticket sales at athletic events
 - College Rodeo
 - Take all entry fees
 - Issue all prize money at end of rodeo
2. What innovative ideas have been incorporated into the operation of the department during the last five years? Discuss the results and provide documentation.
 - Working on implementation of TouchNet and student refunds
 - Implementing GiveCampus for donations and fund raising
 - Worked with Mark Scheopner in the print shop to redesign our rodeo entry fee receipts in order to speed the students time in line up before competing

5: Outcomes, Assessment Measures, Targets of Achievement, and Prior Results

1. If data has previously been gathered, list the intended objectives for the department for the past three years and cite the institutional Essential Skills and other Strategic Plan priorities that each objective supports.

Non Academic Assessment

- Maintain and provide accurate and clear student account records
 - Manage college purchases and expenses and related policies
 - Communicate business office policies clearly to students and employees
2. Describe the data gathering process and give results.
 - Campus wide email
 3. Analyze the data by comparing the actual results to the targeted levels of achievement and document what was learned.
 - We will continue to look for ways to improve communicating important information to students, faculty and staff.
 4. The department will gather feedback regarding expectations and performance from stakeholders through interviews, surveys, focus groups or other appropriate measures. This feedback shall be considered when selecting performance measures and when continuous improvement plans are developed. Describe what changes have been made in response to these measures.
 - We will be transitioning to automated student refunds, should be live by Fall 2023
 - We will be implementing CampusWork to enhance giving and payments for other non tuition related workshops, fund raisers, ect.
 5. Use the results to develop a Continuous Improvement Plan for the department, improving efficiencies based on targeted outcomes. Include consideration for resources, processes, data collection, analysis and timelines for monitoring and assessing the results. List intended outcomes for the department that insure alignment with institutional Essential Skills and other strategic priorities.

For each outcome identify at least one method of measurement that will be used to assess progress toward the outcome. Assessment is strengthened when multiple measures are used. An assessment measure should provide meaningful, actionable data that the department can use to assess efficiency and improve processes.

Describe the target level of achievement for each measure. Levels of achievement shall be:

- Specific and measurable.
- Stated in numerical terms.
- Stated in realistic terms.
- Directly related to the outcome.
- Inclusive of all aspects of the outcome.
- Manageable and practical.

To demonstrate efficiency, determine if external or internal benchmarks are available for comparison.

Spring 2022 Student Assessment of Services survey indicated that only 24.24% of students knew they had access to their bill through Self-Service

- Increase this to 35%

Automated Refunds

- Have 25 students elect to have their financial aid refund deposited directly into their bank account rather than receive a paper check fall 2023

Accounts Payable Self Service

- This will aid in storing of paper invoices and PO
- Have self service live for all users Fall 2024

6: Additional Comments

This space is for the department to add any additional comments to help clarify or explain its functions, if applicable.

7: Executive Summary

1. Briefly describe how the department review was conducted:
 - All Business Office staff were emailed a copy of template and asked for input
 - Any input received was included in department review

2. Describe the MAJOR conclusions regarding the present state of the department:
 - Need for more professional development
 - We have a lot of new people in crucial positions and need to encourage any training in cash management, 1098T, 1099's, fixed assets, and good practices

3. Briefly describe the goals and objectives of the department:
 - All business office staff will attend some professional development in the next calendar year

4. Comment on the progress on previous Departmental Review Action Plans or Recommendations

Departments completing the review for the first time will not have these items and need not answer this question.

5. Describe the department strengths:
 - Very little turn over
 - Strong knowledge of College Policy and Procedures
 - Team Players always ready

6. Describe what areas need improvement:
 - All BO staff will attend professional development in 2023

7. State the recommendations for the department:
 - Continue to look for room and hire grant position

8: Departmental Action Plan (with timelines for recommendations)					
	Year 1	Year 2	Year 3	Year 4	Year 5
	Actions & Budget Implications	Actions & Budget Implications	Actions & Budget Implications	Actions & Budget Implications	Actions & Budget Implications
Recommendation 1: Increase professional development opportunities for staff members. Measure of Success: At least one staff member attending one training opportunity every year.	Actions: One staff member attend training. Budget Implications: \$1,000 Timeline:	Actions: One staff member attend training Budget Implications: \$1,000 Timeline:	Actions: One staff member attend training Budget Implications: \$1,000 Timeline:	Actions: One staff member attend training Budget Implications: \$1,000 Timeline:	Actions: One staff member attend training Budget Implications: \$1,000 Timeline:
Recommendation 2: Measure of Success:	Actions: Budget Implications: Timeline:	Actions: Budget Implications: Timeline:	Actions: Budget Implications: Timeline:	Actions: Budget Implications: Timeline:	Actions: Budget Implications: Timeline:
Recommendation 3: Measure of Success:	Actions: Budget Implications: Timeline:	Actions: Budget Implications: Timeline:	Actions: Budget Implications: Timeline:	Actions: Budget Implications: Timeline:	Actions: Budget Implications: Timeline:

Recommendation 4: Measure of Success:	Actions: Budget Implications: Timeline:	Actions: Budget Implications: Timeline:	Actions: Budget Implications: Timeline:	Actions: Budget Implications: Timeline:	Actions: Budget Implications: Timeline:
Recommendation 5: Measure of Success:	Actions: Budget Implications: Timeline:	Actions: Budget Implications: Timeline:	Actions: Budget Implications: Timeline:	Actions: Budget Implications: Timeline:	Actions: Budget Implications: Timeline:

9: Signature Page and Archiving

	08.20.23
Kim.Harrison - Comptroller	
_____ Department Head/Director	Date
_____ Appropriate Vice President	Date
_____ Vice President for Instructional Services	Date
_____ President	Date

Archiving:

Division Leader submits to VP for Instructional Services

1. A complete electronic version of the Academic Comprehensive Program Review
2. All documentation (electronic)
3. A signed signature page