

Non-Instructional Program Review- Annual Update Template

Service Area/Administrative Unit

Non-Instructional Program Name: Business Office

Academic Year: 2024-2025

Name(s) of Submitter(s): Terri Walker, Jennifer Aguirre, Lorena Aguilar, Armie Caasi, Richard Mendoza

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

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.

2. GOAL #2

Click or tap here to enter text.

Expected Service Area Outcome/Administrative Unit Outcome

Click or tap here to enter text.

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 discontinued, please explain why.

Yes No

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All department goals were lumped into one goal during the full review. This update will break out the goals into separate goals with more clearly defined outcomes.

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

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.

2. GOAL #2 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.

3. 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.

2. Goal 1 Goal 2 Goal 3

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

Training/Professional Development; time for cross training.

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

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

Expected Service Area Outcome/Administrative Unit Outcome

Reduced stress and pressure on employees while ensuring deadlines are met with greater ease and improved well-being.

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) 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.

4. Briefly explain how you will measure the goal/outcome.

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- 1) Both Accounting Technician II positions can complete the grant runs from start to finish.
 - 2) Financial Aid is regularly submitting the distribution list to the Business Office within two days of the distribution date to allow ample time to process grant run.

 5. Please list resources (if any) that will be needed to achieve the goal/outcome.
Time to collaborate with Financial Aid to review the SOPs and established timelines.
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B. NEW GOAL #2

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

Expected Service Area Outcome/Administrative Unit Outcome

1) Reduce reliance on professional expert help by providing in-house expertise for purchasing and accounts payable tasks. 2) Streamline purchasing processes and improve invoice processing to facility more timely service to the campus community and vendors. 3) Address workload demands from increased funding for multiple categorical programs.

6. 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.

7. Relationship to Guided Pathways

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

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

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.

9. Briefly explain how you will measure the goal/outcome.

1) The Aging Report will show payments are processed within 30 days as a regular practice

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with fewer instances of past due invoices. 2) Past due charges are eliminated. 3) The Purchase Order Log is maintained to assist in closing purchase orders each quarter.

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

Hire an additional Accounting Technician I, Classified position, Range 17, Step 1.

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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 #1	Personnel/Staffing: Additional Accounting Technician I	Salary: \$51,096 Benefits: \$22,993 Total: \$74,089	Yes	N/A
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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BUDGET ALLOCATION PROPOSAL

PROFESSIONAL DEVELOPMENT REQUEST				
Indicate the intended users:	<input type="checkbox"/> Students	<input type="checkbox"/> Faculty	<input type="checkbox"/> Staff	<input type="checkbox"/> Other
Do other internal areas/departments need to be involved?				
<input type="checkbox"/> No	<input type="checkbox"/> Yes	Explain: _____		
Is technology needed?	<input type="checkbox"/> No	<input type="checkbox"/> Yes	Explain: _____	

1. Why is the request being made?

The workload demands of the Accounts Payable and Purchasing sections of the Business Office have increased dramatically over the last few years with the changes in funding from the Chancellor's Office. Professional experts have been assisting with work that is assigned to classified employees. The District would benefit from hiring another Accounting Technician I position to reduce reliance on professional expert help.

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

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).

As noted in NIPR Full Review from 2023, 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.

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

The goal listed in the 2023 NIPR Full Review was discontinued and re-written to be more specific. This resource request was originally included in section IV. Resource Requests under Goal/Outcome #1. It is included in the 2024 NIPR Update under section III. Resource Requests Goal/Outcome 2/AUO #1.

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.)

N/A

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

BUDGET ALLOCATION PROPOSAL

This resource will streamline purchasing processes and improve invoice processing to facility more timely service to the campus community and vendors. It will also address the workload demands from increased funding for multiple categorical programs.

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

1) The Aging Report will show payments are processed within 30 days as a regular practice with fewer instances of past due invoices. 2) Past due charges are eliminated. 3) The Purchase Order Log is maintained to assist in closing purchase orders each quarter.

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.)

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](#)

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.

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

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.

3. [Educational Master Plan](#)

The Business Office supports all aspects of the campus in diversity, equity, inclusion and sustainability with an emphasis on ensuring effective stewardship of college resources.

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

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: _____