



# Welcome to Program Review

Merritt College - 2019

Merritt Business Office - Administrative Unit

Program Review

## Program Overview

**Please verify the mission statement for your program. If your program has not created a mission statement, provide details on how your program supports and contributes to the College mission.**

The mission of the Department of Business and Administrative Services (BAS) is to support the Office of Instruction and Student Services by promoting a better understanding of the college's business operations. We seek to uphold the highest standard of excellence in the performance of our responsibilities through the use of sound, effective and efficient business practices that comply with state statutes, board policies and administrative procedures. Our intention is to have teaching, learning, and the student experience proceed unencumbered by the administrative responsibilities of the department.

### Program Total Faculty and/or Staff

#### Full Time

- Stephanie Bunn
- Annie Javier
- Nancy McPhee
- Victoria Menzies
- Lilian Pires
- Maria Perez
- Ron Perez
- Salvador Perez
- David Pounds

#### Part Time

**The Program Goals below are from your most recent Program Review or APU. If none are listed, please add your most recent program goals. Then, indicate the status of this goal, and which College and District goal your program goal aligns to. If your goal has been completed, please answer the follow up question regarding how you measured the achievement of this goal.**

### Describe your current utilization of facilities, including labs and other space

The Business Office currently utilizes several offices in the Q building on two floors. Production, Mailroom and communications is located on the 1st floor and the Business and administrative office is located on the 2nd floor of Q building and utilizes two different offices which includes one conference room, copy room, cashiers office, five offices and two reception areas.

## Resource Request Summary

Total Cost: \$200800  
 Total Resource Request: 6

District Service Area

Personnel

Type	% Time	Description/Justification	Estimated Annual Salary Costs	Estimated Annual Benefits Costs	Total Costs
Classified Staff	100	1 FT Staff Assistant to fill departure of Annie Javier	47604	16376	63980
Classified Staff	100	1 FT Bursar - Provide additional full time coverage to Merritt College Bursar's Office	51192	17610	68802
Classified Staff	50	1 PT Hourly Staff Assistant - Provide roaming office support to the Business Office	26193	1825	28018
<b>Sub-Total: \$160800</b>					

Professional Development

No Resources found for this category

Technology and Equipment

Type	Description/Justification	Estimated Cost
New	New Modernized Photocopier at least comparable to the Ricoh Aficio 3035 in features or services	10000
New	8 New Desktop Computers	30000
<b>Sub-Total: \$40000</b>		

Supplies

No Resources found for this category

Facilities

No Resources found for this category

Library

No Resources found for this category

Other

No Resources found for this category

## Assessments and Major Accomplishments

### Assessment

**Which Administrative Unit Outcomes (AUO) did you assess in the past year? What were the results? Please describe the assessment methods used. How did your work lead to program improvement, that is, the development of Program Improvement Objectives (PIO's) as a result of your assessment?**

Administrative Unit Outcomes (AUO)	What were the assessment results? How were the results used to make improvements?	Program Improvement Objectives (PIO)	PCCD Strategic Goal(s) and Objectives	Timeline
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Procurement, Reimbursement and Accounts Payable

In Fiscal Year 2018-19, the Business Office processed approximately 760 requisitions related to Purchasing & Procurement, Reimbursement and Accounts Payable.

Assessment: The Business Office experienced scenarios in which requisitions experienced delay in processing. These delays were either (1) required supporting documentation was not attached to the requisition or (2) the requisition failed budget validation due to insufficient funding or (3) the requisition was denied because it was a 'verbal order'.

Strengthen Accountability, Innovation and Collaboration

June 30

Cashier

In Fiscal Year 2018-19, the Cashier Office processed 6,364 transactions ranging from fee charges, parking permit purchases and tuition.

Assessment:  
During the Peak enrollment days for both the Fall and Spring semesters, the Cashier Office processed approximately an average of 200 transactions per day. The increased amount of services needed necessitated extra assistance to our main Bursar. A FT 2nd Bursar needs to be hired to assist to assist with the daily responsibilities to the main Bursar.

Advance Student Access, Equity, and Success

June 30

Training	<p>In Fiscal Year 2018-19, the Business Office conducted approximately 11 training/workshops to the college community. The training/workshops focused on Budget Planning, Budget Development, Travel Reimbursement and Purchasing Policies and Procedure.</p> <p>There were approximately 77 attendees total. Average number of attendance per workshop was 7.</p> <p>Assessment: There was small turnout overall due to scheduling conflicts of the college community (i. e. - lack of coverage so that support staff could attend, faculty unable to attend due to instructional obligations, and schedule overlap with other professional development activities).</p>	Strengthen Accountability, Innovation and Collaboration	June 30
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Overhead - Utility & Service	<p>In Fiscal Year 2018-19, the Business Office spent approximately \$1,085,765.59 for utilities and service related payments from Fund 01.</p> <p>Assessment: The D-Building is offline, but utility bills and services are still factored in to the billing from our utility and service partners (i. e. PG &amp; E, EBMUD and Waste Management).</p>	Develop and Manage Resources to Advance Our Mission	June 30
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Overhead - Supplies & Equipment	<p>In Fiscal Year 2018-19, the Business Office spent approximately \$23,617 for non-instructional supplies and equipment.</p> <p>Assessment: Approximately \$20,170 was spent for supplies related to printer toner, office supplies and photocopier machine toner and supplies for the Production Photocopy Service machines. The current generation of desktop computers and laptop computers are more than 4 years old and are still using the Windows 7 operating system (which will no longer receive support from Microsoft by early 2020). Computer hardware &amp; software needs to be replaced &amp; updated in the latest refresh cycle.</p> <p>The Photocopier Machine (Ricoh Aficio 3035) in the Business Office needs to be replaced. It is over 10 years old.</p>	Develop and Manage Resources to Advance Our Mission	June 30
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**What Administrative Unit Outcomes (AUO) and program improvement objectives (PIO) do you plan to work on in the next 2 years?**

Administrative Unit Outcomes (AUO)	Program Improvement Objectives (PIO)	What were the assessment results? How were the results used to make improvements?	Timeline and Person(s) responsible
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Procurement, Reimbursement and Accounts Payable

The Business Office will conduct more training to empower the college community on policy and procedure to reduce the following scenarios: (1) required supporting documentation was not attached to the requisition or (2) the requisition failed budget validation due to insufficient funding or (3) the requisition was denied because it was a 'verbal order'.

FY 2019-20

Training

Provide additional training that will provide more scheduling flexibility to boost college community turnout.

FY 2019-20

## Major Accomplishments

**Please describe 1-3 major accomplishments below since completion of the previous program review.**

Major Accomplishment

Impact to the College and/or District

College Goals

PCCD Strategic Goal(s)

Timeline

## Engagement

**How have the administrators and staff in this area been engaged in institutional efforts such as committees, presentations, and department activities? Please list the committees your staff participate in.**



% Time	Description/Justification	Estimated Annual Salary Costs	Estimated Annual Benefits Costs
100	1 FT Staff Assistant to fill departure of Annie Javier	47604	16376

Total Costs  
63980

**Resource Request**

Personnel	Classified Staff		
% Time	Description/Justification	Estimated Annual Salary Costs	Estimated Annual Benefits Costs
100	1 FT Bursar - Provide additional full time coverage to Merritt College Bursar's Office	51192	17610

Total Costs  
68802

**Resource Request**

Personnel	Classified Staff		
% Time	Description/Justification	Estimated Annual Salary Costs	Estimated Annual Benefits Costs
50	1 PT Hourly Staff Assistant - Provide roaming office support to the Business Office	26193	1825

Total Costs  
28018

**Resource Request**

Technology and Equipment	New	
Description/Justification		Estimated Cost
Purchase or lease a new color copier for Production		200000

**Resource Request**



Facilities

Description/Justification  
Improve Production office to improve airflow

Offices

Estimated Cost  
50000

**Improvement Action**

Action Item  
D-Building Utility Supplement

Description  
In Fiscal Year 2018-19, the Business Office spent approximately \$1,085,765.59 for utilities and service related payments from Fund 01. This total includes utility and services provided to the D-Building (currently off line).  
  
15% of the utility and services expense (specifically PG & E, Waste Management & EBMUD) be charged to Fund 10 to help offset the expenses incurred from Fund 01.

To be completed By  
6/30/2020

Responsible Person

**Resource Request**

Choose an Option

**Improvement Action**

Action Item  
Increase Funding for Equipment Purchases

Description  
The Photocopy Machine (Ricoh Aficio 3035) in the Business Office needs to be replaced. It is over 10 years old.

To be completed By  
12/31/2020

Responsible Person

**Resource Request**

Technology and Equipment

New

Description/Justification  
New Modernized Photocopier at least comparable to the Ricoh Aficio 3035 in features or services

Estimated Cost  
10000

**Improvement Action**

Action Item	Description	To be completed By	Responsible Person
Technology Upgrade	The current generation of desktop computers and laptop computers are more than 4 years old and are still using the Windows 7 operating system (which will no longer receive support from Microsoft by early 2020). Computer hardware & software needs to be replaced & updated in the latest refresh cycle	6/30/2020	Business Director

**Resource Request**

Technology and Equipment	New	
Description/Justification		Estimated Cost
8 New Desktop Computers		30000

**Resource Request**

Technology and Equipment	New	
Description/Justification		Estimated Cost
Purchase new technology to provide better payment options for students		100000

**Action Plan Summary and New Program Goals**

Total Improvement Plans: 4  
 Total Resource Request: 6

**Review, add or modify the following actions plans that were entered in each section. Then review the Program Goals that were marked as in progress. Determine if you would like to keep the in progress goals and draft new 3-year goals for your department or program. The action plan items should support your new program goals. Align your program goals to the college strategic goals and District Strategic Goals.**

Section / Head                      Description

**Assessment and Major Accomplishments**

Assessment and Major Accomplishments

Personnel Resource Request	1 FT Staff Assistant to fill departure of Annie Javier	6/30/2020	Completed Date
	1 FT Bursar to provide additional full time coverage to Merritt College Bursar's Office		Annual Progress Update Date
	1 PT Hourly Staff Assistant - Provide office support to the Business Office		
D-Building Utility Supplement	In Fiscal Year 2018-19, the Business Office spent approximately \$1,085,765.59 for utilities and service related payments from Fund 01. This total includes utility and services provided to the D-Building (currently off line).	6/30/2020	Completed Date
	15% of the utility and services expense (specifically PG & E, Waste Management & EBMUD) be charged to Fund 10 to help offset the expenses incurred from Fund 01.		Annual Progress Update Date
Increase Funding for Equipment Purchases	The Photocopy Machine (Ricoh Aficio 3035) in the Business Office needs to be replaced. It is over 10 years old.	12/31/2020	Completed Date
			Annual Progress Update Date
Technology	The current generation of desktop computers and laptop computers are more than 4 years old and are still using the Windows 7 operating system (which will no longer receive support from Microsoft by early 2020). Computer hardware & software needs to be replaced & updated in the latest refresh cycle	6/30/2020	Completed Date
			Annual Progress Update Date

**New and Continuing Goals**

Discipline, Department or Program Goal	College Goal	PCCD Goal
Continue to provide quality customer services to campus staff, faculty and students to improve access, retention, equity and success.	Equity: Reduce the achievement gaps for African-American, multiethnic and male students.	Strengthen Accountability, Innovation and Collaboration
Promote an environment where student success is the first priority by engaging our community through respectful dialogue and opportunities	Completion: Increase number of degrees and certificates by 20% over the next 5 years.	Strengthen Accountability, Innovation and Collaboration
Improve business processes as they relate to administrative and business services to ensure timely processing of transactions and follow-up in the spirit of exceptional customer services.	Completion: Increase number of degrees and certificates by 20% over the next 5 years.	Advance Student Access, Equity, and Success

Develop human, fiscal and technological resources to advance and sustain our mission.

Completion: Increase number of degrees and certificates by 20% over the next 5 years.

Develop and Manage Resources to Advance Our Mission

## Sign and Submit

**Please provide the list of members who participated in completing this program review.**

Annie Javier, Lilian Pires, Maria Perez, Ron Perez

**Please enter the name of the person submitting this program review.**

Ron Perez on behalf of Victoria Menzies, Business Manager