

1. Assessment Plan - Four Column



PIE - Administrative Services: Bursar Office Unit

Where We Are: Analysis and Summary

2017-18

Contact Person: Bernice Rose

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External Conditions, Trends, or Impacts (Student Services): Enrollment continues to increase - Increase of 2,621 students between FY 15/16 and 16/17

Student Headcount 2016-2017 - 61,962

Student Headcount 2015-2016 - 59,341

Internal Conditions, Trends, or Impacts (Student Services): 1) Bursar's Office not open during the evening hours beyond the first two weeks of the semester to serve night students.

2) Due to the small amount of staff we work to schedule at least two people to work in the area at all times. However, on occasion the office may only have one employee to assist students, answer calls, and count out their cash drawer at the end of day.

Although, we have set up our internal controls to avoid having one employee in the office, it is our recommendation to increase our Fiscal Technician I position from 47.5% to 100% FTE to ensure internal control and employee safety.

Notable Achievements for Theme A: To Advance Academic Excellence and Student Achievement: Processed 16,579 Payment Transactions

Processed 6,834 Miscellaneous Fee Transactions (print cards, clay cards, supply cards, test and certification fees, etc.)

Sold 16,765 Parking Permits

Processed 586 Parking Permit Replacements

Processed 249 Parking Permit Returns for refund

Received 1,465 Incoming Calls (Assisted students with questions regarding fees, BankMobile refund selection, holds, 1098-Ts, etc.)

Received an Estimated 5,000 Bursar Office In Person Inquiries, noncash transactions (Assisted students with questions regarding fees, BankMobile refund selection, holds, 1098-Ts, etc.)

Notable Achievements for Theme B: To Support Student Access and Success: Prepared BankMobile Refund Selection Instructions to assist students on how to make their refund selection.

Notable Achievements for Theme C: Secure Human, Technological, & Financial Resources: PCI Compliance for payment card processing.

Notable Achievements for Theme D: To Foster an Atmosphere of Cooperation and Collaboration: Working with Information Technology and Financial Aid to implement BankMobile Single Sign-on

Collaborated with the Parking Office in revising their Parking Permit Announcement to students

Contributors to the Report: Bernice Rose

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<i>Unit Goals</i>	<i>Resources Needed</i>	<i>Where We Make an Impact: Closing the Loop on Goals and Plans</i>
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Professional Development - To promote training and cross-training to enhance employee knowledge that will increase productivity, encourage collaboration and personal growth.
Status: Active
Goal Year(s): 2015-16, 2016-17, 2017-18, 2018-19
Goal Entered: 06/14/2017

Develop Procedures - To develop internal and external procedures to improve efficiencies and collaboration
Status: Active
Goal Year(s): 2015-16, 2016-17, 2017-18, 2018-19
Goal Entered: 06/14/2017

Customer Service - To provide excellent customer service
Status: Inactive
Goal Year(s): 2015-16, 2016-17, 2017-18, 2018-19
Goal Entered: 06/14/2017

In Progress - ConServe payment download

Reporting Year: 2017-18
% Completed: 100
 The Bursar's Office uses this report to submit payment information in a timely manner to ConServe (Collection Agency). As a result student account balances are updated quicker. This will help prevent over collections from students. (07/19/2018)

In Progress - Cross-Training between Fiscal Services staff and Bursar's Office

In Progress - Remodel of individual Bursar work stations
Type of Request: Workstation
Planning Unit Priority: High
What would success look like and how would you measure it?: Staff and customers are communicating effectively with each other.

Full Funding Requested - Increase our Fiscal Technician I position from 47.5% to 100% FTE (New Resource

<i>Unit Goals</i>	<i>Resources Needed</i>	<i>Where We Make an Impact: Closing the Loop on Goals and Plans</i>
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Allocation - Phase 10)
Describe Plans & Activities
Supported: To increase customer service support to students, meet Internal control standards and protect the safety of our employees. The Bursar's office consist of two full-time and one part-time Fiscal Technician I and one full-time Bursars Coordinator. Due to limited staff, vacation, sick time, personal necessity, etc. there are instances when there is only one full-time Fiscal Technician to assist students, answer calls, and count out their cash drawer at the end of the day. There should always be two employees counting and verifying each other's cash drawer at the end of the day for internal control purposes. For these reasons it is our recommendation to increase our part-time staff member from 47.5% to 100% FTE.
Lead: Bernice Rose
On-Going Funding Requested (if applicable): 43626
Type of Request: Staffing
Planning Unit Priority: High

Upgrade of Banner system - Upgrade of Banner for Student Accounts Receivable in 2016-17, 2017-18 and 2018-19
Status: Active
Goal Year(s): 2016-17, 2017-18, 2018-19
Goal Entered: 06/26/2017