

**South Texas College
2005-2008 2nd Mid-Cycle
IE Report and Update of IE Plan for Year 3
Business Office**

Guiding Principle **1. South Texas College will be a premier learning-centered higher education institution where student and community success are paramount.**

Strategic Outcome *1.1 Build a learning organization by cultivating a culture of evidence that demonstrates mission-focused, data-driven decision making*

Performance Indicator 1.1.4:	To reduce the amount of uncollected tuition and fees from emergency loans and installment payment plans, the business office will develop and implement a plan of action.		Comments: Various methods have been used to minimize the amount of uncollectible amounts from emergency loans, installment plans, and financial aid reversals. Constant collection efforts yield a steady stream of collections. Between 1997 and 2007, 3.08% of all tuition and fee revenue was written off as uncollectible, but at the end of 2007 only 61% of this amount remains uncollected.
Action Plan: 1	A task force committee has been formed to evaluate problem areas which have increased our uncollectibles.	Status: Y	
Action Plan: 2	The Business Office will continue to mail students statements on a frequent basis prior to and after the Emergency Loan and Installment Plan due dates.	Status: y	
Action Plan: 3	The day after the appropriate due dates the Collection Specialist STC's will contact students with an unpaid balance.	Status: y	
Action Plan: 4	A first and second notice will be mailed to students with a past due balance at the end of every semester prior to write offs and submission to collection agency.	Status: y	
Action Plan: 5	As notices are mailed Cashier telemarketers will simultaneously continue to call students with a past due balance.	Status: y	
Action Plan: 6	A summary of analysis will be continued at write off to pinpoint problem areas.	Status: y	
Action Plan: 7	Increase budget by \$25,000 (estimate) to hire a Collections Specialist as a regular staff. (Increased budget expenses will pay for themselves with the return of revenue collected.)	Status: Y	
Action Plan: 8	Set up billing process via email for students.	Resources:	

Action Plan: 9	Image loan and installment applications to assist with research and address validation.	Resources:	
Action Plan: 10	Establish on-line installment process.	Resources:	
Performance Indicator 1.1.5:	To reduce the amount of uncollected tuition and fees from emergency loans and installment payment plans, the business office will develop and implement a plan of action.		Comments: Due dates continue to be advertised via electronic sign, flyers and plasma TV's. Web check implementation has been added as an additional payment option for students.
Action Plan: 1	Distribute flyers with "Due Date" information to all students the cashier comes in contact with.	Status: Y	
Action Plan: 2	Post "Due Date" information in the Cashier area and Electronic sign.	Status: Y	
Action Plan: 3	Include pertinent information (due date, payment options etc) on statements accordingly.	Status: Y	
Action Plan: 4	Ensure that Sale point receipt message reflects due date information.	Status: Y	Sale Point software changed to TouchNet.
Action Plan: 5	Notify students that installment plan is now available for summer sessions.	Status: Y	
Action Plan: 6	Add web check option.	Status: Y	
Action Plan: 7	Provide loan counseling sessions prior to issuance of emergency loans and installments.	Resources:	
Action Plan: 8	Advertise "Due Dates" via Plasma TV, e-mails and flyers.	Resources:	
Performance Indicator 1.1.7:	To reduce the amount of uncollected tuition and fees from emergency loans and installment payment plans, the business office will develop and implement a plan of action.		Comments: Reports currently exist which detail the types of amounts that are determined to be uncollectible. These are used along with an uncollectible task force to strategize ways to minimize the amounts of accounts written off.
Action Plan: 1	Create and prepare management reports from the Banner system for all the departments of the Business Office.	Status: Y	
Performance Indicator 1.1.8:	The business office staff will make decisions based on data through the successful implementation of the Finance, Human Resources, Student, Loan, Budget modules in the Banner system.		Comments: Implementation of Banner modules has enhanced the Business Office ability to make decisions based on data. As an example, reports have been created that track the effect of late Financial Aid awards and reversals on student accounts. Using these

reports has enhanced the timeliness and effectiveness of collection activities.

Action Plan: 1 Create task force to review financial aid reversals and recommend strategies to reduce the reversals. Status: Y

Have met periodically with Financial Aid and made recommendations

Action Plan: 2 Mail statements to students on a regular basis. Status: Y

Strategic Outcome

1.3 Promote shared responsibility among faculty, staff, and students to set and achieve high expectations

Performance Indicator 1.3.2: To ensure that students understand rules and regulations, the cashiers will work with student services to develop and implement the communication plan regarding the new initiatives.

Comments: The TouchNet eBill system is scheduled to begin operation in April 2008. This system will facilitate emails to students communicating due dates, payment options, account changes and amounts due. The system also offers online enrollment in installment payment plans.

Action Plan: 1 Improve student addresses updates in Banner. Status: Y

Action Plan: 2 Establish procedures to obtain correct addresses from students. Status: Y

Action Plan: 3 Post notices. Status: Y

Action Plan: 4 Develop a plan on process of emailing student bills. Status: IP

Purchase of TouchNet E-Bill system was approved by Board September 20, 2007

Action Plan: 5 Implement a process of emailing student bills. (E-Bill) Resources: \$138,233.00

Action Plan: 6 Share address information with Admission using the Emergency Loan and Installment Applications Resources: Share addresses from emergency loan applications and installment agreements with Admissions.

Strategic Outcome

1.5 Exceed community and SACS expectations of a Level II baccalaureate degree granting institution

Performance To eliminate the possibility of SACS recommendations, Vice President for FAS will ensure that the appropriate resources are

Comments: The Budget Development process is followed annually to ensure that appropriate resources are included. Input is received from all Financial Managers regarding the funds needed to operate in the coming year. These requests are based upon

Indicator 1.5.2a: included in the FY 05-06 and 06-07 budget.

their past experience and their future plans, in tandem with their IE plans. All requests are considered in light of the revenues estimated to be available, and decisions are made by upper management regarding final funding levels.

Action Plan: 1 1.) Prepare the budgets considering all the required resources necessary to carry out our functions. Status: Y

Performance Indicator 1.5.2b: To eliminate the possibility of SACS recommendations, Vice President for FAS will ensure that the appropriate resources are included in the FY 05-06 and 06-07 budget.

Comments: The audit item schedule is monitored to ensure completion of all audit schedules, footnotes and tables required for the annual financial report and audit. Unqualified opinions were received for FY06 and FY07. Audit recommendations are implemented as required.

Action Plan: 1 Prepare audit schedules, statements and reports. Status: Y

Action Plan: 2 Prepare footnotes, tables and MDA . Status: Y

Action Plan: 3 Provide and prepare any additional reports requested by auditor. Status: Y

Action Plan: 4 Implement audit recommendations. Status: Y

Action Plan: 5 Implement and review audit timeline. Status: Y

Action Plan: 6 Implement new accounting and audit requirements. Resources: \$124,800.00 - Additional Staff

Guiding Principle

2. South Texas College will serve as the cornerstone for the economic vitality of South Texas.

Strategic Outcome

2.3 Demonstrate excellence in fiscal responsibility and accountability to the public and taxpayers

Performance Indicator 2.3.1a: The departments will be pro-active in meeting auditing standards by implementing the recommendations from the fraud and theft detection study performed by consultant.

Comments: The Business Office has implemented Positive Pay for all active checking accounts. Procedures continue to be reviewed and revised.

Action Plan: 1 Sign Positive Pay agreements between TSB and STC. Status: Y

Action Establish procedures to identify steps required and

Plan: 2	assign responsibilities.	Status: Y	
Action Plan: 3	Implement Positive Pay after the outstanding check list is prepared and provided to TSB.	Status: Y	
Performance Indicator 2.3.1b:	The business office, human resources, and purchasing departments will take corrective action on the recommendations from the internal auditors in the fraud survey report.		Comments: The Business Office has implemented many procedures in Banner HR to ensure that all hours worked are paid properly. An Accountability review was held to review the Overtime process college-wide. Timecards and the TimeForce system are constantly monitored via various methods to detect fraud.
Action Plan: 1	Review policies and procedures to identify areas that may be susceptible to fraud.	Status: Y	
Action Plan: 2	Develop a Payroll action plan to evaluate adequacy of internal controls, actions required to strengthen and enhance internal controls.	Status: Y	
Action Plan: 3	Meet with departments in the College that need clarification on overtime policy and proper calculation of overtime hours.	Status: Y	
Action Plan: 4	Develop method to test timecard accuracy	Status: Y	Timeforce implemented
Action Plan: 5	Ensure total hours worked are properly recorded and paid.	Status: Y	
Performance Indicator 2.3.1c:	The Vice President for Finance and Administrative Services, business office, purchasing, human resources, facilities planning and construction and operations and maintenance departments will complete the activities in the Action Plan developed to comply with SAS 99 recommended procedures regarding ethics and anti-fraud processes and controls.		Comments: Compliance with SAS 99 recommended procedures is monitored through annual reviews of the plan of action. Activities completed include implementation of the fraud hotline, issuance of guidelines for reporting and investigating fraud, abuse and other improprieties, and annual distribution of the fraud survey to a random sample of College personnel and to all FAS personnel.
Action Plan: 1	Disseminate SAS 99 Efforts Action Plan to all departments.	Status: Y	
Action Plan: 2	Ensure that all activities are completed, including a) implementation of fraud hotline, b) guidelines for reporting and investigating fraud, abuse and other improprieties, c) distribution of the fraud survey, d) self-assessment of fraud risk for entire Bu	Status: Y	

Performance Indicator 2.3.2:	Strengthen fiscal accountability by ensuring that the scope of services and areas to be audited are identified for the internal auditors and audits are performed on a timely basis with corrective actions implemented by each department responsible.	Comments: Recommendations concerning potential areas for internal audits are made annually. Appropriate corrective actions are implemented in response to recommendations from audit reports.
Action Plan: 1	Increase scope of services for internal auditors.	Status: Y
Action Plan: 2	Identify new areas for internal audits.	Status: Y
Action Plan: 3	Continue to implement audit recommendations	Status: Y
Performance Indicator 2.3.2a:	Increased fiscal accountability will be strengthened through analysis done by Accountability Office.	Comments: The Business Office has cooperated with the Accountability Office as three reviews were conducted, including reviews of Overtime, Uncollectibles, and Budget Transfers.
Action Plan: 1	Provide information and documentation requested by Accountability Office.	Resources:
Performance Indicator 2.3.3:	Ensure no findings in the enrollment audit by reviewing and implementing all requirements regarding payments and refunding policy.	Comments: Satisfaction of all THECB payment requirements are ensured through a thorough review of all students with unpaid balances prior to census, and followup with collection efforts. At census, all students who still have unpaid tuition balances are dropped. Satisfaction of all THECB refund requirements are ensured by setting up tuition refund tables based upon THECB regulations, along with continual procedure reviews which result in accurate and timely refunds.
Action Plan: 1	Self Reports for NSF, Installments and Emergency loans	Status: Y
Action Plan: 2	Gather documentation as requested during the last audit	Status: Y
Action Plan: 3	Review tuition refund tables.	Status: Y
Action Plan: 4	Update the Cashier walkthrough.	Status: Y
Action Plan: 5	Review applicable procedures.	Status: Y

Performance Indicator 2.3.4:	The business office will model excellence by submitting the Comprehensive Annual Financial Report to the GFOA and earning the Certificate of Excellence in Financial Reporting.	Comments: The Business Office has been awarded the GFOA Certificate of Excellence in Financial Reporting for the past four consecutive fiscal years. Application for the award for FY07 has been submitted.
Action Plan: 1	Continue preparing the annual financial report in the format required by GFOA.	Status: Y
Action Plan: 2	Submit the AFR to the GFOA.	Status: Y
Action Plan: 3	Implement all recommendations received from the GFOA	Status: Y
Performance Indicator 2.3.4a:	The Business Office will model excellence by submitting the Investment Policy and Investment Strategy to the GTOT and earn the excellence certificate.	Comments: The application and documentation to earn the Investment Policy Certification was submitted on March 10, 2008.
Action Plan: 1	Submit the Investment Policy and Investment Strategy to GTOT.	Resources:
Performance Indicator 2.3.4b:	The Business Office will model excellence by submitting the Annual Budget to the GFOA for the excellence certificate.	Comments: The business office is currently working and preparing all the required documentation to apply for the Annual Budget certificate. Expected date of completion 8/31/08
Action Plan: 1	Submit the Annual Budget to the GFOA.	Resources:
Performance Indicator 2.3.5a:	Business Office will be fiscally responsible by securing assets and data with inventory control and password access to data and reports.	Comments: The Business Office aids in securing assets through cooperation with inventory control by maintaining the Banner Fixed Asset System to record all capitalized assets. Security of data is maintained via an orderly approval and justification process with appropriate supervisory authorization for granting employee access to Banner Finance and Student.
Action Plan: 1	Establish procedures to properly grant access to authorized personnel to be implemented in Banner Finance.	Status: Y

Performance Indicator 2.3.5b:	Business Office will be fiscally responsible by implementing a time clock system for classified employees college wide.		Comments: TimeForce timekeeping system was implemented 6/1/06 and is being used College wide for all non-exempt personnel. Training sessions regarding proper usage are ongoing for both users and supervisors.
Action Plan: 1	Setup in-house software and timekeeper terminal demonstrations in order to evaluate the needs of STC.	Status: Y	
Action Plan: 2	Evaluate the benefits STC and its employees would gain from automating the collection of time and attendance data.	Status: Y	
Action Plan: 3	Publicize bid and develop RFP to purchase a system that will collect real-time information and update the payroll records without the use of timesheets	Status: Y	
Action Plan: 4	Budget for the software license, interface to Banner software, employee training and system maintenance support.	Status: Y	
Action Plan: 5	Request authorization to award bid from Board.	Status: Y	
Action Plan: 6	Conduct training and monitor timeforce users to ensure compliance with established procedures.	Resources:	
Performance Indicator 2.3.5c:	Vice President for Finance and Administrative Services and all departments will be accountable for implementing the retention periods and properly destroying records based on the records retention plan with the policy and procedures established by the College.		Comments: The Business Office follows the recommended record retention and destruction schedule for all official documents.
Action Plan: 1	Revise Procedures: Revise Procedures as per the approved Record Retention Schedule dated May 3, 2005 to include updated item numbers, record series and retention schedules.	Status: Y	
Action Plan: 2	Equipment: boxes designed to resist stocking, with handles, light weight and easy to carry. Back support belts. 3/4 circular color labels and 2"X4" white labels. Binders to maintain record retention inventory logs.	Status: Y	
Action Plan: 3	Forms: updated the form. Location of documentation storage.	Status: Y	
Action Plan: 4	Prepare schedules and forms when records need to be retrieve.	Status: Y	
Action Plan: 5	Destruction: Records destruction will be done by outside source and records that do not need to be retain will be shredder.	Status: Y	
Action Plan: 6	Implement document imaging	Resources:	

Performance Indicator 2.3.5d:	Evisions implementation by the Business Office	Status: Y	Comments: The Business Office prints all checks as well as other official documents such as IRS Form 1099 using Evisions.
Action Plan: 1	Prepare procedures, including new job duties and levels of approvals, for the implementation of printing of batch and online checks.	Status: Y	
Action Plan: 2	Prepare procedures, including new job duties and levels of approvals, for the implementation of printing of requisitions and purchase orders.	Status: Y	
Action Plan: 3	Prepare procedures, including new job duties and levels of approvals, for the implementation of printing of IRS forms (1099, 1098, W-2, etc).	Status: Y	
Action Plan: 4	Prepare procedures, including new job duties and levels of approvals, for the implementation of printing of invoices and statements.	Status: Y	
Action Plan: 5	Prepare procedures, including new job duties and levels of approvals, for the implementation of positive pay.	Status: Y	
Performance Indicator 2.3.5e:	Banner implementation	Status: Y	Comments: The Business Office has cooperated in all aspects of implementing and using Banner Finance, HR, and Student modules. Training and enhancement is ongoing. Process Improvement recommendations are being reviewed, tested and implemented. AppWorx is currently being implemented to further automate a variety of routine Banner processes.
Action Plan: 1	Staff shall attend training.	Status: Y	
Action Plan: 2	Staff shall process map legacy system processes.	Status: Y	
Action Plan: 3	Staff shall develop new chart of accounts.	Status: Y	
Action Plan: 4	Staff shall crosswalk accounts.	Status: Y	
Action Plan: 5	Staff shall test of all processes.	Status: Y	
Action Plan: 6	Staff shall setup securities.	Status: Y	
Action Plan: 7	Staff shall setup access.	Status: Y	
Action Plan: 8	Staff shall develop new procedures.	Status: IP	In progress

Action Plan: 9	Staff shall develop training material and train end-users.	Status: Y	
Action Plan: 10	Staff shall develop user manuals.	Status: IP	In progress
Action Plan: 11	Staff shall assign new responsibilities.	Status: Y	
Action Plan: 12	Staff shall determine and develop reports and reporting.	Status: IP	In progress
Action Plan: 13	Staff shall develop new forms and revise current forms.	Status: Y	
Action Plan: 14	Staff shall complete segregation of duties review.	Status: Y	
Action Plan: 15	Staff shall complete internal control review.	Status: Y	
Action Plan: 16	Staff shall communicate internally and externally regarding procedures and processes.	Status: Y	
Action Plan: 17	Secure and install Appworx to facilitate scheduled execution of Banner processes.	Resources: Additional training	
Action Plan: 18	Implement Finance PIA review recommendations	Resources:	
Action Plan: 19	Implement Student PIA review recommendations	Resources:	
Action Plan: 20	IDEA program	Resources:	

Guiding Principle

3. South Texas College will foster an environment for the students and community to achieve a better quality of life.

Strategic Outcome

3.1 Develop and promote seamless systems and processes from prospective student through successful exit to motivate and assist in timely graduation, transfer or employment

Performance Indicator 3.1.1:

The cashiers will work with student services department to ensure that enrollment targets are met or exceeded by ensuring that statements are mailed or students are called to make payments on a timely basis.

Comments: Various activities occur on an ongoing basis. Weekly billings along with daily billings of new activity are mailed to students on the unpaid lists prior to census. Collection calls are also made to these students. Cashier service was expanded in December 2007 to include daily service at MidValley. Daily service at Starr is planned to begin in May 2008. All campuses have extended hours and increased personnel during peak registration and payment periods.

Action Plan: 1	Cashiers will communicate with Student Services to ensure that tuition tables are active by the targeted early registration date.	Status: Y
Action Plan: 2	Cashiers will coordinate with Financial Aid so that award letters are mailed out as soon as tuition tables are active.	Status: Y
Action Plan: 3	Cashiers will mail out the first due date statements one week after award letters have been sent out, thus eliminating calls dealing with awards.	Status: Y
Action Plan: 4	Cashiers will continue to update and monitor the collection timeline schedule to ensure that due date statements are mailed out in a timely manner. Statements will include pertinent information (due dates, payment options available, etc.).	Status: Y
Action Plan: 5	Cashiers will generate unpaid lists daily beginning two weeks before classes begin.	Status: Y
Action Plan: 6	Cashiers will call students on the unpaid lists before drop dates.	Status: Y
Action Plan: 7	Urgent Payment Reminders will be mailed out six days before the due date.	Status: Y
Action Plan: 8	Emergency loan availability will be tracked and cashiers scheduled at all sites.	Status: Y
Action Plan: 9	Production calendar will be monitored on a daily basis.	Status: Y
Action Plan: 10	Web term is active to enable students to pay with a credit card via the web	Status: Y
Action Plan: 11	Cashier availability will be extended at all locations to service student needs.	Resources: \$35,660.00 - additional staff
Action Plan: 12	Analyze and update use of holds by cashiers	Resources:

Strategic Outcome

3.2 Develop and implement quality services in prompt response to student and community needs

Performance Indicator 3.2.3:	To decrease the amount of time for students to receive payments, a Student Direct Card program will be implemented by Spring 2006.	Comments: The Chase JagCard was implemented in Fall 2007. Evaluation of card acceptance and usage is underway.
Action Plan: 1	Setup in-house presentations in order to evaluate the needs of STC.	Status: Y
Action Plan: 2	Evaluate the benefits STC, students, and its employees would gain from having funds distributed through stored value cards	Status: Y
Action Plan: 3	Research the use of such cards by other State agencies and community colleges.	Status: Y
Action		

Plan: 4	Publicize bid and evaluate results.	Status: Y
Action Plan: 5	Budget for the stored value cards and associated card service charges.	Status: Y
Action Plan: 6	Request authorization to award bid from Board.	Status: Y
Action Plan: 7	Implement the use of the stored value card (JagCard).	Resources: Implement Fall 2007

Strategic Outcome

3.3 Strengthen the personalized, student-centered environment

Performance Indicator 3.3.3a: The cashiers will be cross-trained to provide accurate student information on all aspects of the student system.

Comments: The SPIRIT Office was established in May 2007 and serves as a liaison between student service departments to resolve students' issues. The manual of pertinent cashier information and procedures kept at each site is being transferred to a shared drive to ensure that the latest procedures are available to all cashier personnel. Orientations are held each term for temporary staff to ensure that students receive correct information from all cashier personnel.

Action Plan: 1	Develop "One Stop" concept within the Cashier Department.	Status: Y	
Action Plan: 2	Reference manual of pertinent information and procedures will be available at each cashier window and at each site.	Status: Y	
Action Plan: 3	Training schedule will be developed to ensure all cashiers are cross trained on processes.	Status: Y	
Action Plan: 4	Addresses will be confirmed and student will fill out a change of address form to be forwarded to Admissions.	Status: Y	
Action Plan: 5	Orientations will be held each term for all temporary workers.	Status: Y	
Action Plan: 6	Continue flow charts of procedures.	Status: Y	In progress
Action Plan: 7	Enhance services to students through establishing Problem/Resolution Office (SPIRIT) and providing customer service training for cashiers.	Resources:	

Comments: Cross training occurs on an ongoing and as-needed basis within and

Performance Indicator 3.3.3b:	Cross train financial staff to be ready to support student functions.	between the various departments of the Business Office. A formal Cross Training program between all departments is occurring March 2008 through July 2008 for Accounting Assistants and Accounting Specialists.
Action Plan: 1	Identify areas to cross-train.	Status: Y
Action Plan: 2	Identify personnel to cross-train.	Status: Y
Action Plan: 3	Prepare a time line to cross-train.	Status: Y

Strategic Outcome

3.4 Continuously improve student satisfaction with all aspects of the College

Performance Indicator 3.4.5:	Bookstore On-line integration	Comments: Book checks are being issued to students beginning 10 days prior to the first day of class.
Action Plan: 1	Review and update flow chart procedure when applicable.	Status: Y
Action Plan: 2	Coordinate meetings at the end of each term with the Bookstore, Business Office, ITS and Financial Aid to resolve issues surfacing that term.	Status: NA
Action Plan: 3	Coordinate meetings at the beginning of each term with the Bookstore, Business Office, ITS and Financial Aid to set dates.	Status: Y
Performance Indicator 3.4.6a:	Web check implementation by the Business Office.	Comments: The web check payment option was implemented in May 2007, and use by students continues to grow.
Action Plan: 1	Develop a timeline for the purchase and implementation of a "web check" software.	Status: Y
Performance Indicator 3.4.6b:	Upgraded cashiering system implementation by the Business Office.	Comments: Touchnet Cashiering system was implemented July 2006
Action Plan: 1	Develop a timeline for the purchase and implementation of a cashiering system.	Status: Y
Action Plan: 2		Resources:

Guiding Principle **4. South Texas College will nurture a culture where collaboration is valued and achievement is recognized.**

Strategic Outcome

4.2 Value one another

Performance Indicator 4.2.1:	Each department director will demonstrate appreciation and promote staff morale by recognizing contributions, performance and service of the employees.	Comments: Supervisors continue to demonstrate appreciation to their staff by issuing various awards.
Action Plan: 1	Continue "Stick Out Your Neck" Award.	Status:
Action Plan: 2	Expand "Milestones Reached" recognitions.	Status: IP
Action Plan: 3	Continue years of service awards.	Status: IP
Action Plan: 4	Employee of the Month award	Resources:
Action Plan: 5	Continuously update and monitor business office goals and priorities	Resources:
Performance Indicator 4.2.2:	Each department's staff will attend Employee Recognition Ceremonies and report greater satisfaction as a result of including more recognition awards to celebrate accomplishments.	Comments: Supervisors encourage staff to attend the Employee Recognition Ceremony as scheduled by the Human Resources Department.
Action Plan: 1	Continue encouraging all staff to attend the employee recognition ceremony.	Status: Y
Performance Indicator 4.2.3:	Vice President for Finance and Administrative Services and all directors will foster a harmonious work environment by encouraging collaboration and team work within each department.	Comments: The Business Office has held a minimum of two retreats annually, with teamwork activities included in each. Collaboration sessions within and between departments are held as needed to discuss mutual issues. AA Roundups are held monthly, and selected Business Office staff have participated in the Ambassador Training Session. All of these activities promote a harmonious work environment, both within the Business Office and with other departments of the College.
Action Plan: 1	Incorporate team building training in annual retreats.	Status: Y
Action		

Plan: 2	Increase the number of retreats to 2 times a year.	Status: Y
Action Plan: 3	Increase number of collaboration sessions regarding Banner system and other topics.	Status: Y
Action Plan: 4	Provide regular training sessions regarding Business Office procedures (AA Roundup). Other departments (HR, Purchasing, other) provide training as deemed necessary.	Resources:
Action Plan: 5	Participate in Ambassador Training Sessions	Resources:

Strategic Outcome

4.3 Encourage and provide up-to-date professional development and skill enablement for faculty and staff

Performance Indicator 4.3.1:	Vice President for Finance and Administrative Services and all directors will meet staff needs for professional development by implementing a personal professional development plan for each employee.		Comments: The Business Office has implemented a professional development plan for each employee. All employees will receive at least one specialized training experience in FY08.
Action Plan: 1	Prepare professional development plan for each employee.	Status: Y	
Action Plan: 2	Review the professional development plan on an annual basis.	Status: IP	First annual review will occur in 2008

Performance Indicator 4.3.2:	Faculty and staff will be made aware of changes in procedures by planning and conducting awareness and collaboration sessions and sending alert notices as necessary.		Comments: The Business Office issues Alert Notices which are distributed to all faculty and staff as needed. These notices address new procedures, changes in procedures, reminders of existing procedures, and due dates and deadlines for various items. A list of all Alert Notices issued since FY05 are posted on the Business Office website. AA Roundups are held monthly to introduce and reinforce all procedures with Administrative Assistants and other attendees. The Business Office website is updated regularly.
Action Plan: 1	Continue preparing and issuing alert notices on pertinent information.	Status: Y	
Action Plan: 2	Continue conducting collaboration sessions on pertinent information.	Status: Y	
Action Plan: 3	Update the Business Office web site.	Status: Y	

Action Plan: 4 Develop College wide Fund raising procedures Resources:

Performance Indicator 4.3.4: FAS departments will continue providing department specific orientation to new employees.

Comments: All new employees receive departmental training in the form of an employee handbook, a listing of their responsibilities, access to applicable written processes and procedures, as well as training by their supervisor and co-workers.

Action Plan: 1 Accounting Assistant will maintain and update department's procedures' manual. Status: IP In progress

Action Plan: 2 Administrative Assistant will conduct an orientation with new employees and provide them with a copy of the department's procedures' manual. Status: Y

Action Plan: 3 Administrative Assistant will provide new employees a list detailing their position's division of responsibilities. Status: Y

Strategic Outcome

4.4 Continuously improve faculty and staff satisfaction with the work environment

Performance Indicator 4.4.2: All directors will continue constructive feedback to employees to improve the quality of work in the form of oral and written communications or formal recognitions.

Comments: Internal quarterly evaluations of all personnel was begun in November 2007. Annual evaluations were conducted in February 2008. Informal feedback is given on an as needed basis by supervisors.

Action Plan: 1 Continue weekly departmental meetings to provide constructive feedback. Status: Y

Action Plan: 2 Prepare performance evaluations. Status: Y

Performance Indicator 4.4.3: The Vice President for Finance and Administrative Services and all directors will continue to provide a quality work environment through team work and through recommendations developed in collaboration with each work unit.

Comments: The Business Office holds at least two retreats annually, one of which concentrated on implementing the Fish Culture Customer Service philosophy in FY07. Collaboration sessions are held to solve problems and address new issues on a daily basis.

Action Plan: 1 Continue conducting collaboration sessions to ensure quality work environment. Status: Y

Action Continue team work building in retreats. Status: Y

Plan: 2			
Action Plan: 3	Implement Fish Culture	Resources:	
Performance Indicator 4.4.4:	Results from the faculty/staff surveys will indicate improved satisfaction with FAS services and/or indicate areas that need improvement and will be included in the planning for the next biennium.		Comments: A faculty/staff survey measuring satisfaction with service from the various areas of the Business Office and Cashiers has been designed and will be administered during the month of April 2008.
Action Plan: 1	Continue to form task forces and committees to discuss and implement solutions to issues concerning the Business Office	Status: Y	
Action Plan: 2	Obtain faculty and staff survey results and incorporate into new year planning.	Status: N	This project is scheduled for completion in Spring 2008