

**Southwest Texas Junior College  
Business Office  
Unit Action Plan for 2011 - 2012**

Start Date: 9/1/2011 End Date: 8/31/2012

Unit Purpose: **The Business Office supports the SWTJC institutional purpose by providing students and employees accurate and timely information with quality service.**

Submitted By  
Anne Tarski  Yes

Reviewed By  
Hector Gonzales  No

Approved By  
Hector Gonzales  No

Closeout Ready  
Anne Tarski  No

Closeout Completed  
Hector Gonzales  No

Planning Outcome No. 1 Business Office Year: 2011-2012

Expected Outcome: **The Business Office will decrease the expenditures related to paper and printing through the use of the Fortis Record Management System.**

Rationale: **Due to funding decreases the budget needs to be cut by 10%. Through visual observation, it is noted that the amount of paper and printing in the office is excessive.**

Intervention: **All Journal Entry reports, PGLT (daily 200 page report), IGLP, SSRC, BADE, CGLP, CGLR, and FGLR will be printed to the Fortis imaging station rather than printed on paper. Copier will be set up to scan to email accounts and Fortis. Training for staff will be conducted regularly.**

Mission Link: **Accessible, affordable, high-quality education**

Institutional Goal Link: **Efficiency**

Strategic Goal Link: **NA**

Planning Type: **Student Success**

Success Indicator:

Key Function Link:

Assessment Method: **Compare this year's copying and paper supply costs to last year's.**

Assessment Measures:

Measure	Beginning	Target	Ending
1. Provide bursar services for students, employees and community.	0%	0%	0%
Percent decrease in paper supply costs. Last Year: \$3,447. This year: \$1,166.25	100	50	44

Start-End Date: 09/01/2011 - 8/31/2012

Budget:

Personnel: \$ 0 for  
 Equipment: \$ 0 for  
 Other: \$ 3000 for **Software modification - Fortis**  
 Total Cost: \$ 3000 Unit's Budget \$0 Other Funding Source \$0

Outcome Reviewed:  Pending

Reviewer's Comments:

Budget Approved:  Pending

Budget  
Comments:

[Empty text box]

Outcome  
Approved:  
Approver's  
Comments:

Pending  
[Empty text box]

Findings: The Business Office decreased its use of paper by 66%. The BO firmly believe that this could be the beginning of not only saving money on paper but saving man power hours and money spent on physical storage.

Actions Taken/Changes: Look into further use of the Fortis system and cloud based systems new to the market.

Outcome achieved: No

Outcome Resulted in Improved Student Learning: No

Outcome Resulted in Improved Student Success: No

Person Responsible: Anne Tarski

Date: 2/17/2015

Planning Outcome No. 2 Unit: Business Office Year: 2011-2012

Expected Outcome: The Business Office will increase the ability to provide timely and accurate financial information to faculty, staff and Board Members.

Outcome Rationale: Funding cuts have made it necessary for every department within SWTJC to operate in the most effiecent manner possible. A program that can produce reports based on Excel worksheets at a moment's notice will save valuable time, allowing Busniess Office personnel the ability to get more done.

Intervention: The Business Office will have Synoptix installed in order to streamline reporting. This program will have the ability to be designed to create reports based on Excel worksheets.

Mission Link: Accessible, affordable, high-quality education

Institutional Goal Link: Efficiency

Strategic Goal Link: NA

Planning Type: Student Success

Success Indicator:

Key Function Link:

Assessment Method: The success of this change will be measured in the decrease in the amount of time spent on preparing the monthly financial statements.

Assessment Measures:

Measure	Beginning	Target	Ending
4. Prepare general ledger. Measurement in hours. Begin: 1 hour. End 15 minutes.	60	30	15
3 Prepare and file financial statement. Measurement in days. Begin 3 days. End 1/2 day.	3	1	0.5

Start-End Date: 09/01/2011 - 8/31/2012

Budget:

Personnel: \$ 0 for  
 Equipment: \$ 0 for  
 Other: \$ 16500 for Synoptix software \$15,000 1 week of training for Lisa and Anne \$1,500  
 Total Cost: \$ 16500 Unit's Budget \$16500 Other Funding Source \$0

Outcome  
Reviewed:  
Reviewer's  
Comments:

Pending  
[Empty text box]

Budget Approved:

Budget Comments:

Outcome Approved:

Approver's Comments:

Findings: **Significant reduction in the time and effort to run general ledger reports and produce the monthly financial statement.**

Actions Institutionalize the use of Synoptix within the business office and other related offices. Expand the number and type of

Taken/Changes: reports using Synoptix.

Outcome achieved:

Outcome Resulted in Improved Student Learning:

Outcome Resulted in Improved Student Success:

Person Responsible: Anne H. Tarski

Date: 2/17/2015

**Southwest Texas Junior College  
Business Office  
Unit Action Plan for 2012 - 2013**

Start Date: 9/1/2012 End Date: 5/1/2013

Unit Purpose: **The Business Office supports the SWTJC institutional purpose by providing students and employees accurate and timely information with quality service.**

Submitted By  
Anne Tarski

Reviewed By  
Hector Gonzales

Approved By  
Hector Gonzales

Closeout Ready  
Anne Tarski

Closeout Completed  
Hector Gonzales

Planning Outcome No. 1 Business Office Year: 2012-2013

Expected Outcome: **The Business Office will continue to decrease the expenditures related to paper and printing through extended use of the Fortis Record Management System.**

Outcome Rationale: **Due to funding decreases the budget needs to be cut by 10%. Through visual observation, it is noted that the amount of paper and printing in the office is excessive.**

Intervention: **Reduce the amount of paper used in the business office by extending the use of the Fortis Print Management system to accounts payable and accounts receivable.**

Mission Link: **Accessible, affordable, high-quality education**

Institutional Goal Link: **Efficiency**

Strategic Goal Link: **NA**

Planning Type: **Student Success**

Success Indicator:

Key Function Link:

Assessment Method: **Compare this year's copying and paper supply costs to last year's.**

Assessment Measures:

Measure	Beginning	Target	Ending
<b>1. Provide bursar services for students, employees and community.</b>	0%	0%	0%
<b>Percent decrease in paper supply costs. Last Year: \$358.85. This year: 2,108.57</b>	100	50	587

Start-End Date: 09/01/2012 - 8/31/2013

Budget:

Personnel: \$ 0 for  
 Equipment: \$ 0 for  
 Other: \$ 1000 for **Software modification - Fortis**  
 Total Cost: \$ 1000 **Unit's Budget \$1000 Other Funding Source \$0**

Outcome Reviewed:

Reviewer's Comments:

Budget Approved:

Budget Comments:

**Southwest Texas Junior College  
Business Office  
Unit Action Plan for 2013 - 2014**

Start Date: 9/1/2013 End Date: 5/1/2014

Unit Purpose: **The Business Office supports the SWTJC institutional purpose by providing students and employees accurate and timely information with quality service.**

Submitted By  
Anne Tarski  Yes

Reviewed By  
Hector Gonzales  No

Approved By  
Hector Gonzales  No

Closeout Ready  
Anne Tarski  No

Closeout Completed  
Hector Gonzales  No

Planning Outcome No. 1 Business Office Year: 2013-2014

Expected Outcome: **The Business Office will decrease the expenditures related to check printing through the use of a print management system.**

Outcome Rationale: **Due to funding decreases the budget needs to be cut by 10%. Through visual observation, it is noted that the amount of paper and printing in the office is excessive.**

Intervention: **A print management system will be identified in order to reduce the costs of printing checks and the inefficiency of using a dot-matrix printer.**

Mission Link: **Accessible, affordable, high-quality education**

Institutional Goal Link: **Efficiency**

Strategic Goal Link: **NA**

Planning Type: **Student Success**

Success Indicator:

Key Function Link:

Assessment Method: **Compare this year's copying and paper supply costs to last year's.**

Assessment Measures:

Measure	Beginning	Target	Ending
<b>1. Provide bursar services for students, employees and community.</b>	0%	0%	0%
<b>Check printing software in place and training accomplished. Begin: No End: Yes</b>	0	1	1

Start-End Date: 09/01/2013 - 8/31/2014

Budget:

Personnel: \$ 0 for

Equipment: \$ 0 for

Other: \$ 25000 for **Software**

Total Cost: \$ 25000 Unit's Budget \$25000 Other Funding Source \$0

Outcome Reviewed:  Pending

Reviewer's Comments:

Budget Approved:  Pending

Budget Comments:

[Empty box]

Outcome Approved: **Pending**

Approver's Comments: [Empty box]

Findings: **Softdocs was installed.**

Actions Taken/Changes: **Account payable will continue to use Softdocs to print our own checks and will expand Softdocs use to purchase orders. Our assessment is that we are still printing too many small amount checks.**

Outcome achieved: **No**

Outcome Resulted in Improved Student Learning: **No**

Outcome Resulted in Improved Student Success: **No**

Person Responsible: **Anne Tarski**

Date: **2/17/2015**

Planning Outcome No. 2 Unit: Business Office Year: 2013-2014

Expected Outcome: **More students will reach the 15 sch and 30 sch threshold through increased use of Estudias to identify those who are approaching a threshold and helping them find support to succeed.**  
Outcome Rationale: **Recognition that students sometimes are near a threshold and cannot reach it because of financial and other issues that can be addressed by the business office.**  
Intervention: **Provide Estudias training to Business Office personnel.**

Mission Link: **Accessible, affordable, high-quality education**

Institutional Goal Link: **Efficiency**

Strategic Goal Link: **Learning - Increase 'Momentum Points'**

Planning Type: **Student Success**

Success Indicator: **Reach 15 sch in year**

Key Function Link:

Other Links: **An intervention designed to improve a student learning or success.**

Assessment Method: **Identify students on the drop list who might meet a specified criteria (i.e., the 15 or 30 sch threshold) and after interacting with Business Office staff, meet the criteria after enrolling for the term.**

Assessment Measures:

Measure	Beginning	Target	Ending
Percent of students review in Estudias for decision making	0	80	100
Percent of students reaching 15 sch	0	50	60

Start-End Date: **9/1/2013 - 5/1/2014**

Budget:

Personnel: \$ 0 for  
Equipment: \$ 0 for  
Other: \$ 0 for  
Total Cost: \$ 0 Unit's Budget \$0 Other Funding Source \$0

Outcome Reviewed: **Pending**

Reviewer's Comments: [Empty box]

Budget Approved: **Pending**

[Empty box]

Budget  
Comments:

[Empty text box]

Outcome  
Approved:

Pending

Approver's  
Comments:

[Empty text box]

[Empty text box]

Findings:

VP Tarski looked up every student (on Estudios) while making decisions about giving a student more financial leeway. Over 60% of these students succeeded.

Actions

There will be an effort to involve more decision makers in the Business Office with the Estudios program.

Taken/Changes:

Outcome achieved: No

Outcome Resulted in Improved Student Learning: No

Outcome Resulted in Improved Student Success: No

Person Responsible: Anne Tarski

Date: 2/17/2015

Planning Outcome No. 3 Unit: Business Office Year: 2013-2014

Expected

Students will improve learning related to the Business Office Literacy program outcome 'Manage financial and identification cards'.

Outcome:

Rationale:

Assessments indicate that improvement is needed in this program outcome. In addition, the College default percentage on Direct Loans is concerning.

Intervention:

Provide a more robust and organized Business Office orientation to students. Begin using the SmartCard for Identification and closed-loop debit card.

Mission Link: Accessible, affordable, high-quality education

Institutional Goal Link: Learning

Strategic Goal Link: Quality - Improve Student Services

Planning Type: Student Learning

Key Function Link:

Other Links: An intervention designed to improve a student learning or success.

Assessment Method: Monitor usage

Assessment

Measures:

Measure	Beginning	Target	Ending
Manage financial and identification cards	0%	80%	0%
Percent of students using SmartCard. Begin: 0 End:4000	0	5000	4000

Start-End Date: 9/1/2013 - 8/31/2014

Budget:

Personnel: \$ 0 for

Equipment: \$ 70000 for Card readers, mobile card readers, cash register, etc.

Other: \$ 60000 for Software - CBord

Total Cost: \$ 130000 Unit's Budget \$130000 Other Funding Source \$0

Outcome

Reviewed:

Pending

Reviewer's

Comments:

[Empty text box]

[Empty text box]

Budget

Approved:

Pending

Budget

Comments:

[Empty text box]

Outcome  
Approved:  
Approver's  
Comments:

Pending

*Findings:* **The SWTJC SmartCard was introduced to employees and students. The card allows Estudios to have a picture of the student, which is quite helpful when looking up students. Also the students can put money on the closed-loop debit card to use in the cafeteria. Along with this program, the cafeteria can now accept credit cards.**

*Actions Taken/Changes:* **We will continue to roll out the SmartCard program. The libraries will begin using it instead of cash and the student services personnel will begin recording which students they are serving using the card.**

Outcome achieved:

Outcome Resulted in Improved Student Learning:

Outcome Resulted in Improved Student Success:

Person Responsible: **Anne Tarski**

Date: **2/17/2015**