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

Start Date: 9/1	1/ 2011 End Dat	te: 8/31/2012				
Unit Purpose:	The Bu	siness Office supports the SWT ees accurate and timely informa	SWTJC institutional purpose by providing students and ormation with quality service.			
Submitted By Anne Tarski	Yes					
Reviewed By Hector Gonza	les No					
Approved By Hector Gonza Closeout Rea	dv -					
Anne Tarski	No					
Closeout Com Hector Gonza						
		Planning Outcome No.	1 Business Offi	ce Year: 201	1-2012	
Expected Outcome: Outcome Rationale: Intervention:	the Fortis R Due to fund noted that the All Journal I will be print	ss Office will decrease the expe ecord Management System. ing decreases the budget needs he amount of paper and printing Entry reports, PGLT (daily 200 p ed to the Fortis imaging station ill accounts and Fortis. Training	s to be cut by 10%. T g in the office is exce page report), IGLP, S rather than printed	hrough visual obessive. SRC, BADE, CGLI	eservation, it is	
Mission Link: A	ccessible, afford	dable, high-quality education				
Institutional Go	al Link: Efficienc	у				
Strategic Goal	Link: NA					
Planning Type:	Student Succes	s				
Success Indica	tor:					
Key Function Li	ink:					
Assessment Method:	Compare th	nis year's copying and paper su	pply costs to last ye	ar's.		
Assessment Measures:						
		sure	Beginning	Target	Ending	
1. Provide burs	sar services for	students, employees and	0%	0%	0%	
Percent decrea		ply costs. Last Year: \$3,447.	100	50	44	
Start-End Date:	09/01/2011 - 8/3	1/2012				
Budget:						
Personne	l: \$ 0 for					
Equipment						
Other	: \$ 3000 for	Software modification - Fortis	S			
Total Cost	\$ 3000	Unit's Budget \$0 Other Funding \$	Source \$0			
Outcome Reviewed:	Pending	Processor.				
Reviewer's Comments:	3			The state of the s	The second secon	
Budget Approved:	Pending					

Comments:							
Outcome	Promote Committee Committe						
Approved:	Pending						
Approver's Comments:			The contract and				
Findings:	The Business Office decreased its use of pa	per by 66%. The BC	firmly believe that	it this could be the i	beainnina of		
Actions Taken/Change	Look into further use of the Fortis system ar	າ power hours and n	noney spent on ph	ivsical storage.	ocgiming of		
Outcome achie							
Outcome Resu	Ited in Improved Student Learning: No						
	Ited in Improved Student Success: No						
Parson Rasnon	sible: Anne Tarski						
- erson Nespon Date: 2/17/201 5							
Jale. ZITIZUTE	,						
	Planning Outcome No. 2	Unit: Business	Office Year: 2	2011-2012			
Expected	The Business Office will increase the ability	y to provide timely a	nd accurate finan	cial information to			
Outcome: Outcome	lacuity, staff and Board Wembers.						
Rationale:	Funding cuts have made it neccessary for e efficeent manner possible. A program that	can produce reports	hasad on Eventu	varkahaata at -			
	moment's notice will save valuable time, all	lowing Busniess Off	ice personnel the	ability to get more			
	moment's notice will save valuable time, allowing Busniess Office personnel the ability to get more done.						
ntervention:	one. The Business Office will have Synoptix inst	alled in order to stre	eamline reporting.	This program will			
ntervention:	done. The Business Office will have Synoptix inst have the ability to be designed to create rep	alled in order to stre	eamline reporting. I worksheets.	This program will			
	one. The Business Office will have Synoptix inst	alled in order to stre	eamline reporting. I worksheets.	This program will			
fission Link: Ac	The Business Office will have Synoptix inst have the ability to be designed to create rep	alled in order to stre	eamline reporting. I worksheets.	This program will			
fission Link: Ac	The Business Office will have Synoptix inst have the ability to be designed to create rep cessible, affordable, high-quality education I Link: Efficiency	alled in order to stre	eamline reporting. I worksheets.	This program will			
dission Link: Ac nstitutional Goa trategic Goal Li	The Business Office will have Synoptix inst have the ability to be designed to create rep cessible, affordable, high-quality education I Link: Efficiency	alled in order to stre	eamline reporting. I worksheets.	This program will			
dission Link: Ac nstitutional Goa trategic Goal Li	The Business Office will have Synoptix inst have the ability to be designed to create rep cessible, affordable, high-quality education Link: Efficiency ink: NA	alled in order to stre	eamline reporting. I worksheets.	This program will			
flission Link: Ac estitutional Goa trategic Goal Li lanning Type: S	The Business Office will have Synoptix inst have the ability to be designed to create rep cessible, affordable, high-quality education I Link: Efficiency ink: NA Student Success	alled in order to stre	eamline reporting. I worksheets.	This program will			
Mission Link: Ac nstitutional Goa trategic Goal Li lanning Type: S uccess Indicato	The Business Office will have Synoptix inst have the ability to be designed to create reposessible, affordable, high-quality education a Link: Efficiency ink: NA Student Succession: k: The success of this change will be measured.	called in order to street to borts based on Exce	l worksheets.				
dission Link: Ac nstitutional Goa trategic Goal Li lanning Type: S uccess Indicato ey Function Lin ssessment	The Business Office will have Synoptix inst have the ability to be designed to create rep cessible, affordable, high-quality education I Link: Efficiency ink: NA Student Success	called in order to street to borts based on Exce	l worksheets.				
dission Link: Ac nstitutional Goa trategic Goal Li lanning Type: S uccess Indicato ey Function Lin ssessment fethod: ssessment	The Business Office will have Synoptix inst have the ability to be designed to create reposessible, affordable, high-quality education a Link: Efficiency ink: NA Student Succession: k: The success of this change will be measured.	called in order to street to borts based on Exce	I worksheets. n the amount of ti	me spent on			
dission Link: Ac astitutional Goa trategic Goal Li lanning Type: S uccess Indicato ey Function Lin assessment dethod: ssessment deasures:	The Business Office will have Synoptix inst have the ability to be designed to create reposessible, affordable, high-quality education of Link: Efficiency fink: NA Student Succession: The success of this change will be measure preparing the monthly financial statements Measure ral ledger. Measurement in hours. Begin: 1	ealled in order to stro ports based on Exce ed in the decrease is. Beginning	I worksheets. In the amount of til Target	me spent on Ending			
dission Link: Ac astitutional Goa trategic Goal Li lanning Type: \$ uccess Indicato ey Function Lin assessment dethod: ssessment deasures: Prepare gene our. End 15 mi	The Business Office will have Synoptix inst have the ability to be designed to create reposessible, affordable, high-quality education of Link: Efficiency fink: NA Student Succession: The success of this change will be measure preparing the monthly financial statements Measure ral ledger. Measurement in hours. Begin: 1 nutes.	called in order to street to borts based on Exce	I worksheets. n the amount of ti	me spent on			
dission Link: Ac astitutional Goa trategic Goal Li lanning Type: \$ uccess Indicato ey Function Lin assessment dethod: ssessment deasures: Prepare gene our. End 15 mi	The Business Office will have Synoptix inst have the ability to be designed to create reposessible, affordable, high-quality education of Link: Efficiency fink: NA Student Succession: The success of this change will be measure preparing the monthly financial statements Measure ral ledger. Measurement in hours. Begin: 1 nutes. le financial statement. Measurement in days.	ealled in order to stro ports based on Exce ed in the decrease is. Beginning	I worksheets. In the amount of til Target	me spent on Ending			
dission Link: Ac nstitutional Goal trategic Goal Li lanning Type: S uccess Indicate ey Function Lin ssessment dethod: ssessment deasures: Prepare gene our. End 15 mi Prepare and fi egin 3 days. E	The Business Office will have Synoptix inst have the ability to be designed to create reposessible, affordable, high-quality education of Link: Efficiency fink: NA Student Succession: The success of this change will be measure preparing the monthly financial statements Measure ral ledger. Measurement in hours. Begin: 1 nutes. le financial statement. Measurement in days.	ed in the decrease is. Beginning	n the amount of til Target 30	me spent on Ending 15			
dission Link: Ac nstitutional Goal trategic Goal Li lanning Type: S uccess Indicate ey Function Lin ssessment dethod: ssessment deasures: Prepare gene our. End 15 mi Prepare and fi egin 3 days. E	The Business Office will have Synoptix inst have the ability to be designed to create reposessible, affordable, high-quality education of Link: Efficiency ink: NA Student Succession: The success of this change will be measure preparing the monthly financial statements Measure ral ledger. Measurement in hours. Begin: 1 nutes. le financial statement. Measurement in days. and 1/2 day.	ed in the decrease is. Beginning	n the amount of til Target 30	me spent on Ending 15			
dission Link: Ac nstitutional Goa trategic Goal Li lanning Type: S uccess Indicato ey Function Lin assessment dethod: ssessment deasures: Prepare gene our. End 15 mi Prepare and fi egin 3 days. E	The Business Office will have Synoptix inst have the ability to be designed to create reposessible, affordable, high-quality education of Link: Efficiency ink: NA Student Succession: The success of this change will be measure preparing the monthly financial statements Measure ral ledger. Measurement in hours. Begin: 1 nutes. le financial statement. Measurement in days. and 1/2 day.	ed in the decrease is. Beginning	n the amount of til Target 30	me spent on Ending 15			
dission Link: Ac nstitutional Goal trategic Goal Li lanning Type: S uccess Indicate ey Function Lin ssessment dethod: ssessment deasures: Prepare gene our. End 15 mi Prepare and fi egin 3 days. E art-End Date: 0	The Business Office will have Synoptix inst have the ability to be designed to create reposed to creat	ed in the decrease is. Beginning 60	n the amount of til Target 30 1	me spent on Ending 15 0.5			
dission Link: Ac nstitutional Goal trategic Goal Li lanning Type: S uccess Indicate ey Function Lin assessment dethod: ssessment deasures: Prepare gene our. End 15 mi Prepare and fi egin 3 days. E art-End Date: 0 udget:	The Business Office will have Synoptix inst have the ability to be designed to create reposed to creat	ed in the decrease is. Beginning 60	n the amount of til Target 30 1	me spent on Ending 15 0.5			
Alission Link: Ac astitutional Goal Lilanning Type: Success Indicate by Function Linussessment Method: ssessment Measures: Prepare geneour. End 15 mid Prepare and fiegin 3 days. Eart-End Date: 0 adget: Personnel: Equipment:	The Business Office will have Synoptix inst have the ability to be designed to create reposed to creat	ed in the decrease is. Beginning 60 3	n the amount of til Target 30 1	me spent on Ending 15 0.5			
dission Link: Ac astitutional Goal Lilanning Type: Success Indicate ey Function Lin assessment dethod: ssessment feasures: Prepare and filegin 3 days. E art-End Date: 0 adget: Personnel: Equipment: Other: Total Cost: utcome	The Business Office will have Synoptix inst have the ability to be designed to create reposessible, affordable, high-quality education of Link: Efficiency fink: NA Student Success The success of this change will be measure preparing the monthly financial statements Measure ral ledger. Measurement in hours. Begin: 1 nutes. le financial statement. Measurement in days. nd 1/2 day. 9/01/2011 - 8/31/2012 \$ 0 for \$ 0 for \$ 0 for \$ 0 Synoptix software \$15,000 1 we have the ability to be designed to create reposition.	ed in the decrease is. Beginning 60 3	n the amount of til Target 30 1	me spent on Ending 15 0.5			
Alission Link: According trategic Goal Listanning Type: Success Indicated by Function Linessessment Aleasures: Prepare geneour. End 15 mi Prepare and fiegin 3 days. Eart-End Date: Outdoor: Personnel: Equipment: Other: Total Cost:	The Business Office will have Synoptix inst have the ability to be designed to create representation of Link: Efficiency link: NA Student Success The success of this change will be measure preparing the monthly financial statements Measure ral ledger. Measurement in hours. Begin: 1 nutes. le financial statement. Measurement in days. nd 1/2 day. 9/01/2011 - 8/31/2012 \$ 0 for \$ 0 for \$ 0 for \$ 16500 for Synoptix software \$15,000 1 we \$ 16500 for Synoptix software \$15,000 1 we \$ 16500 Unit's Budget \$16500 Other Fundity.	ed in the decrease is. Beginning 60 3	n the amount of til Target 30 1	me spent on Ending 15 0.5			
dission Link: Ac astitutional Goal Lilanning Type: Success Indicate ey Function Lin assessment dethod: assessment feasures: Prepare generic egin 3 days. Eart-End Date: 0 adget: Personnel: Equipment: Other: Total Cost: utcome eviewed:	The Business Office will have Synoptix inst have the ability to be designed to create representation of Link: Efficiency link: NA Student Success The success of this change will be measure preparing the monthly financial statements Measure ral ledger. Measurement in hours. Begin: 1 nutes. le financial statement. Measurement in days. nd 1/2 day. 9/01/2011 - 8/31/2012 \$ 0 for \$ 0 for \$ 0 for \$ 16500 for Synoptix software \$15,000 1 we \$ 16500 for Synoptix software \$15,000 1 we \$ 16500 Unit's Budget \$16500 Other Fundity.	ed in the decrease is. Beginning 60 3	n the amount of til Target 30 1	me spent on Ending 15 0.5			

Budget Approved:	Pending					
Budget Comments:	·					
Outcome Approved:	Pending					
Approved. Approver's	Parties of defection of the continuous and the cont		grade that who can written a free at the first at the shift of the shi	menterskrifte far for til state fra som ble som old so		
Comments:		i da	L			
		No.				
Findings:	Significant reduction in the time and effort	ort to run general ledger reports	and produce the	monthly financial s	tatomont	
Actions Taken/Change	Institutionalize the use of Synoptix withies: reports using Synoptix.					
Outcome achi	eved: No					
Outcome Resi	ulted in Improved Student Learning: No					
Outcome Resi	ulted in Improved Student Success: No					
Darson Daana	noibles Anna II. Tauats					

Person Responsible: Anne H. Tarski

Date: 2/17/2015

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

Unit Purpose:				iness Office supports the SWT. es accurate and timely informa			oviding stud	dents and
Submitted By Anne Tarski		Yes						
Reviewed By Hector Gonzale	es	No						
Approved By Hector Gonzale	s	No						
Closeout Ready Anne Tarski	/	No						
Closeout Comp Hector Gonzale		No						
				Planning Outcome No. 1	Business O	fice Yea	ar: 2012-2	013
Expected Outcome: Outcome Rationale: Intervention:	thr Du not Re	ough e to fu ted tha duce t	exte indii at th the a	s Office will continue to decrea nded use of the Fortis Record ng decreases the budget needs e amount of paper and printing mount of paper used in the bu- system to accounts payable a	Management Systents to be cut by 10%. In the office is exections of the section	em. Through viscessive. Stending the	sual obeser	vation, it is
Mission Link: Ac	cessil	ble, af	ford	able, high-quality education				
Institutional Goal	Link:	Efficie	ency					
Strategic Goal Li	nk: NA	4						
Planning Type: S	tuder	nt Suc	cess					
Success Indicato	r:							
Key Function Lini	k:							
Assessment Method:	Co	ompar	e thi	s year's copying and paper su	pply costs to last y	ear's.		
Assessment Measures:								
		ı	Vleas	ure	Beginning	Targ	et	Ending
1. Provide bursa community.	ar ser	vices	for s	tudents, employees and	0%	0%	1	0%
Percent decreas This year: 2,108	se in p .57	paper	supp	oly costs. Last Year: \$358.85.	100	50		587
Start-End Date: 0	9/01/2	2012 -	8/31	/2013				
Budget:								
Personnel:	\$	0	for					
Equipment:	\$		for	• • • • • • • • • • • • • • • • • • • •				
Other:	\$		tor	Software modification - Fortis				
Total Cost:	\$	1000		Unit's Budget \$1000 Other Funding	ng Source \$0			
Nevieweu.	Pendi	ing		NAME OF THE PARTY				
Reviewer's Comments:								TO COMMON TO THE PARTY AND
Budget Approved:	Pendi	ng	STORES STORE	 Seminarra conservation in institution in many conservation of conservation of conservation. 				
Budget								NZYC SCIBBBOOK of allow on arrang quantum compagnings .
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 SWTs employees accurate and timely informa	IC institutional purpos tion with quality servic	e by providing e.	students and
Submitted By Anne Tarski	Yes			
Reviewed By Hector Gonzales	No			
Approved By Hector Gonzales	No			
Closeout Ready Anne Tarski	No see see see see			
Closeout Completed Hector Gonzales	No			
	Planning Outcome No. 1	Business Office	Year: 201	3-2014
Expected The Outcome: prin	e Business Office will decrease the exper	nditures related to ched	k printing thro	ough the use of a
Outcome Due Rationale: not Intervention: A p	e to funding decreases the budget needs ed that the amount of paper and printing rint management system will be identifie fficiency of using a dot-matrix printer.	in the office is excess	ive.	
Mission Link: Accessit	ole, affordable, high-quality education			
Institutional Goal Link:	Efficiency			
Strategic Goal Link: NA	ı.			
Planning Type: Studen	t Success			
Success Indicator:				
Key Function Link:				
Assessment Co Method:	ompare this year's copying and paper sup	oply costs to last year's	s.	
Assessment Measures:				
	Measure	Beginning	Target	Ending
 Provide bursar serve community. 	rices for students, employees and	0%	0%	0%
Check printing softwa Begin: No End: Yes	re in place and training accomplished.	0	1	1
Start-End Date: 09/01/2	013 - 8/31/2014			
Budget:				
Personnel: \$	0 for			
Equipment: \$	0 for			
	25000 for Software 25000 Unit's Budget \$25000 Other Fundi			
·	5000 Unit's Budget \$25000 Other Fundi	ng Source \$0		
Outcome Reviewed: Pendi	ng			
Reviewer's Comments:	and a minute an insurance manager manager to add to the a discussion and according to the a		TO . SPECIAL PROPERTY OF THE P	er de de la companya
Budget Approved: Budget Comments:	ng		\$500.00 libik.hamayeeyee	

Outcome	The Control of the Co				
Approved:	Pending				
Approver's Comments:			g Tilling Statement		
Findings:	Softdocs was installed.				
Actions	Account payable will continue to use	Softdocs to print our own	checks and will ex	pand Softdocs use to purc	hase order
Outcome achie	s: Our assessment is that we are still pleved: No	rinting too many small amo	unt checks.		
	ulted in Improved Student Learning: No	MATE IN THE PARTY OF THE PARTY			
	Ilted in Improved Student Success: No	7			
	sible: Anne Tarski	3			
Date: 2/17/201					
Fato: 2/1/2010					
	Planning Outcome N	lo. 2 Unit: Business	Office Year: 2	013-2014	
Expected Outcome: Outcome Rationale: Intervention:	More students will reach the 15 sch identify those who are approaching Recognition that students sometime and other issues that can be addres Provide Estudias training to Busines	a threshold and helping the es are near a threshold and sed by the business office.	em find support to	succeed.	
	cessible, affordable, high-quality educ				
	/ Link: Efficiency	ation			
	<i>ink</i> : Learning - Increase 'Momentum Po	:4~!!			
	Student Success	ints"			
	or: Reach 15 sch in year				
Key Function Lir	·				
•					
Other Links: Assessment Method:	An intervention designed to improve a ldentify students on the drop list w threshold) and after interacting with term.	ho might meet a specified o	riteria (i.e. the 15	or 30 sch enrolling for the	
Assessment Measures:					
	Measure	Beginning	Target	Ending	
	ents review in Estudias for decision ma	aking 0	80	100	
Percent of stud	ents reaching 15 sch	0	50	60	
Start-End Date: \$)/1/2013 - 5/1/2014				
Budget:					
Personnel: Equipment: Other:	\$ 0 for				
Total Cost:	\$ 0 Unit's Budget \$0 Other F	unding Source \$0			
Outcome Reviewed:	Pending				
Reviewer's Comments:			The state of the s	A CONTRACT OF THE CONTRACT OF	
ooniments.			S		
Budget	Pending				
Approved:	WELL AND COLOR MANAGEMENT TO THE AND ALLER A CASE		general constitution of the	e V	

Buaget Comments:			A		
	THE STATE OF THE S		av. 1		
Outcome Approved:	Pending				
Approver's Comments:					
Comments.			V		
Findings:	VP Tarski looked up every student (on Est Over 60% of these students succeeded.	udias) while making (decisions about giv	ring a student more fir	nancial leeway.
Actions Taken/Chang	There will be an effort to involve more deci	sion makers in the B	usiness Office with	the Estudias progran	٦.
Outcome act	3 And A State of the section of the sec				
Outcome Re	sulted in Improved Student Learning: No				
	sulted in Improved Student Success: No				
Person Respo	onsible: Anne Tarski				
Date: 2/17/20					
	Planning Outcome No. 3	Unit: Business	Office Year: 2	013-2014	
Expected Outcome: Outcome	Students will improve learning related to a financial and identification cards'.				
Rationale: Intervention:	Assessments indicate that improvement i default percentage on Direct Loans is con Provide a more robust and organized Bus SmartCard for Identification and closed-lo	cerning. iness Office orientati			
Mission Link: #	Accessible, affordable, high-quality education	op debit card.			
	pal Link: Learning				
	Link: Quality - Improve Student Services				
	Student Learning				
Key Function L	ink:				
Other Links:	An intervention designed to improve a stud	ent learning or succe	ee		
Assessment Method:	Monitor usage	one loanning or succe	33.		
Assessment Measures:					
	Measure	Beginning	Target	Ending	
	cial and identification cards	0%	80%	0%	
Percent of stu	idents using SmartCard. Begin: 0 End:4000	0	5000	4000	
Start-End Date:	9/1/2013 - 8/31/2014				
Budget:					
Personne Equipmen Othe	t: \$ 70000 for Card readers, mobile card re	aders, cash register,	etc.		
Total Cos	t: \$ 130000 Unit's Budget \$130000 Other Fu	nding Source \$0			
Outcome Reviewed:	Pending				
Reviewer's	provide the control of the control o				
Comments:			.A ₂		
D					
Budget Approved:	Pending				
Budget				Control of the Contro	
Comments:			1		

Outcome	Pending	
Approved:		
Approver's		
Comments:		
Findings:	The SWTJC SmartCard was introduced to employees and students. The card allows Estudias to have a picture of the	
J	student, which is quite helpful when looking up students. Also the students can put money on the closed-loop debit car	٠,
	to use in the cafeteria. Along with this program, the cafeteria can now accept credit cards.	u
Actions	We will continue to roll out the SmartCard program. The libraries will begin using it instead of cash and the student	
Taken/Change:	s: services personnel will begin recording which students they are serving using the card.	
Outcome achie		
Outcome Resu	ulted in Improved Student Learning: No	
Outcome Resul	ulted in Improved Student Success: No	
	· Control Maria Carlo	
Person Respons	sible: Anne Tarski	

Date: 2/17/2015