



# FULLERTON COLLEGE

ELEVATING EXCELLENCE.

## Administrative & Operational Services

### 2022 - 2023 Self-Study

#### Three-Year Program Review Template

#### Bursar's Office

#### Office of Administrative Services

#### Statement of Collaboration

The department/office staff listed below collaborated in an open and forthright dialogue to prepare this Self Study. Statements included herein accurately reflect the conclusions and opinions by consensus of the department/office staff involved in the self-study.

#### Participants in the self-study

- Malmi Vitharanage
- Linh Quan
- Gita Shah
- Jami Ebright
- Leslie Mahoney
- Kristina Bravo

#### Authorization

After the document is complete, it must be signed by the Principal Author, the Department Manager, and (when appropriate) the Dean or appropriate Immediate Management Supervisor (IMS) prior to submission to the Program Review Committee.

Malmi Vitharanage

Mgr.- Campus  
Accounting

11/30/2022

Printed name of Principal Author

Signature

Title

Date

Malmi Vitharanage

Mgr.- Campus  
Accounting

11/30/2022

Printed name of Department Manager

Signature

Title

Date

Rodrigo Garcia

Vice President-  
Adm. Services

Printed name of Dean or  
Immediate Management Supervisor  
(IMS)

Signature

Title

Date

## 1.0 Mission and Goals

Mission, Vision, Core Values and College Goals drive all college activities. The Program Review committee would like to understand the connection of your department/office to the Mission, Vision, Core Values and College Goals. Summarize how your department/office supports each area.

The Bursar's Office supports the College's Mission, Vision, Core Values and Goals by providing oversight and control safeguards over club/trust accounts. We assist students with the payment of registration fees and process refunds. The Bursar's Office also administers local and state awarded scholarships and third-party payments. Receiving payments from students helps to ensure that students are not dropped from their classes, and administering scholarships and other payments helps to ensure that books, supplies and other related items are available to the students.

The Bursar's Office provides specific support through ensuring sufficient funding for various events/activities that support the Mission, Vision, Core Values and Goals of the College and through timely processing of the related expenditure and reimbursement documents.

## 2.0 Department/Office /Data & Trends Analysis

2.1 Describe the purpose, components, and staffing of this department/office.

The purpose of the Bursar's Office is to oversee the financial activities of auxiliary accounts such as Associated Students, Auto Shop, Box Office and Cosmetology, as well as monies that are kept in trust for other departments on campus related to fundraising and student club activities. The staffing of the office consists of one Manager, one Accounting Specialist, two Accounting Technicians, and two Account Clerk II.

Manager – reviews all banking deposits; interacts with other departments for clarification of procedures; interacts with District and other campuses regarding financial and system issues; prepares bank reconciliations; Prepares Journal entries; performs year end closing; approves Bursar Requisitions; reviews all processing of payments; Processes Uploads; facilitates interim and final audits.

Accounting Specialist – reviews all trust accounts for accuracy; reviews deposits for Associated Students, Auto Shop, Box Office and Cosmetology; prepares Journal Entries; Processes student refunds

Accounting Technician – administers scholarships and third-party payments; oversees processing of third-party refunds; administers rideshare program for Fullerton College, Wilshire Continuing Education Center and Anaheim Campus; reviews and enters requisitions for payments; processes individual club/trust account deposits; processes student refunds, prints checks, enters Journal Entries, reviews student accounts for possible write offs

Account Clerk II – reviews and enters requisitions for payments; processes individual club/trust account deposits; prepares banking deposits; processes student refunds, processes vault transactions, reviews student accounts for possible write offs

2.2 Staffing – complete the table below. Please list the total number of personnel in each type of position in the department/office. Within each classification in the first column, please list the position titles. For confidentiality, **do not** include the names of any people in the position.

**CURRENT STAFF**

Classification (Include position titles)	# of staff in each position title	Percent of employment	Months per year of employment	Source of funding (General / Categorical)	FTE
Managers					
Manager of Campus Accounting	1	100%	12	General	1
Classified					
Accounting Specialist	1	100%	12	General	1
Accounting Technician	2	100%	12	General	2
Accounting Clerk II	2	100%	12	General	2
Hourly - Adult					
None					
Hourly - Student					
None					
Professional Experts					
None					
<b>Total FTE</b>					<b>6</b>

2.3 Other Resources

**OTHER RESOURCES**

Please list each position by classification in the department/program	Services Provided	Number of Hours	Overall Cost	Source of funding (General / Categorical)
Independent Contractors				
None				
Volunteers				
None				
Interns				
None				
<b>Total Hours &amp; Costs</b>				
<b>Total FTE</b>				<b>0</b>

- 2.4 Utilize the data provided in the tables above in a discussion of the appropriateness of the staffing levels of this department/office.

The staffing level serves the needs of the office.

- 2.5 How does this department/office serve the population of the college?

The Bursar's Office oversees Third Party Payments and Scholarships that are provided/awarded to students by other agencies to provide for the students' educational needs, including registration payments, books and supplies, and other related expenses.

The Bursar's Office processes refunds to students caused by dropped/cancelled classes and when another agency has paid for the student's classes (such as scholarships, fee waivers, veteran's benefits).

The Bursar's Office processes payments to vendors and daily transactions for the Box Office, Cosmetology, Auto Shop, Library and Associated Students. The Bursar's Office processes payments to vendors and deposits of monies collected by various departments resulting from fundraising and other campus activities.

- 2.6 Since the previous Program Review Self-Study what significant changes have occurred that impact the services of this department/office?

Change in staffing/personnel – the previous manager retired on 12/31/2021 and a new manager was hired in line with the same job title.

- 2.7 Describe any laws, regulations, trends, policies and procedures or other influences that have an impact on the effectiveness of your department/office.

Budget Accounting Manual  
District policies  
External auditors  
Financial markets  
Student enrollment trends

- 2.8 Provide any other data that is relevant to your self-study, for example, if you collected data to assess an outcome.

### **3.0 Strengths, Weaknesses, Opportunities, Challenges (SWOC)**

- 3.1 Based on your analysis in 2.1 through 2.8, what are the strengths of your department/office?

We provide information regarding our policies and procedures to students, so they are aware of what steps are needed regarding their refund and payment. We provide information to other department staff so they are aware of documentation needed to process their deposits or vendor payments.

3.2. Based on your analysis in 2.1 through 2.8, what are the weaknesses of your department/office?

We do not currently have a method to measure customer satisfaction.

When staff is out of the office, we do not have complete cross-training to ensure that students and staff from departments receive the help they need in a more timely manner.

3.3 Based on your analysis in 2.1 through 2.8, what opportunities exist for your department/office?

Staff cross-training and streamlining new methods to carry out projects

3.4 Based on your analysis in 2.1 through 2.8, what challenges exist for your department/office?

Increasing costs associated with credit card payments and collection of non-payment accounts

## 4.0 Outcomes Assessment

**Note:** Sections 4.8 and 4.9 are new. Please review before filling out your outcomes tables below.

4.1 List your outcomes and complete the expandable table below.

	What are your program outcomes?	When was the Assessment completed?	When did you analyze the data?	When were the changes made?	Number of Cycles Completed
1.	Process Student Refunds	9/30/22	9/30/22	N/A	4
2.	Process Scholarship Payments	11/15/22	11/15/22	N/A	4

4.2 Assessment: Complete the expandable table below.

	Intended Outcomes	How will you determine if the outcome is met?	How will you collect the data?	Can this data be disaggregated at the student level?	What will the results show?
1.	Students will receive their refunds no later than the date printed in the class schedule	Refunds are completed by the date printed	Refunds were finished by the due date	N/A	Staff are able to finish the refunds on time when all worked together.
2.	Students will be assisted with their scholarships and payments will be applied to their account with any refunds processed within one week of receipt	Payments and refunds are processed	We are applying the payments to the student's account within two days, and students are receiving related refunds within one week.	N/A	We will continue to monitor the process and communicate any issues with students

- 4.3 How has assessment of outcomes led to improvements in services provided to students by this program?

The Bursar's Office prints a report of all students that have a refund showing on their account. The processing of these refunds is taking longer because the report is longer. However, when a student contacts the office directly, their refund is processed immediately so they receive their refund within two weeks.

- 4.4 How has assessment of outcomes led to improvements in student learning and achievement?

The processing of scholarships and other payments on time will make sure funds are available for books and other needed supplies which will enhance their academic success and achievement.

- 4.5 What challenges remain to make your department/office outcomes more effective?

The increase in refunds due to students' financial circumstances will increase the processing time.

- 4.6 Describe how the department's/office's outcomes are linked to college goals.

The processing of scholarships and other payments helps to promote student success in that the student is less likely to be dropped from classes due to lack of payment, and funds are available for books and other needed supplies.

Cultivate a culture of Equity by making sure all students' questions are addressed.

- 4.7 Describe how the department's/office's outcomes support the achievement of the institution level SLOs.

- 4.8 A. What methods are used to assess the department/office's effectiveness to the population that interacts with your department/office?

None

B. What do the results of the above methods of assessment indicate about the effectiveness of the department/office?

C. How were the assessment results used to make improvements to services provided by this department/office? Please provide examples.

- 4.9 At least one outcome listed in 4.1 should address the following:

A. List the outcome that focuses on individual student learning or actions.

B. Identify methods to assess outcomes in such a way that the data can be disaggregated.

- C. Identify a process for using outcome assessment data to improve your department's/office's services.
- D. Identify a process for assessing outcomes and collecting data that can be used to build dashboards (where applicable).

#### 4.10 Outcomes Equity Analysis

- A. Looking at the one outcome from 4.9, do you find significant differences by race, ethnicity, gender, and other categories? Describe here what the data shows. What strategies will you use to close the attainment gaps among groups of students? What kinds of professional learning would help?

No significant difference. Student refunds and scholarships are processed for all students regardless of their race, ethnicity, gender, and other categories, to promote and improve individual student learning experience.

### 5.0 Evaluation of Progress Toward Previous Strategic Action Plans

- 5.1 List the strategic action plans from your last self-study/program review.

Reduce student receivable balance to properly reflect financial position on the college's financial statements.

Replace workstations for three back offices. Replace chairs for all Bursar's Office staff.

Replace vault equipment of currency/bill and coin counters.

- 5.2 Describe the level of success and/or progress achieved in the strategic action plans listed above.

While the Bursar's Office is diligent about writing off student accounts and using the Chancellor's Office Tax Offset Program (COTOP) to reduce student receivables, this will continue to be a goal since the college/district does not utilize requirement of student paying in full for their classes at the time of registration.

The Bursar's office received work stations that include the ability to stand or sit as needed, together with new chairs.

The Bursar's office received new currency counters and a coin sorter.

- 5.3 How did you measure the level of success and/or progress achieved in the strategic action plans listed above?

Reduction of student receivables is measured within the financial statements at the end of each year.

Staff is utilizing better ergonomically friendly work stations and chairs that has decreased work-related injuries while working in an office environment that requires use of a computer for a majority of the day.

Monies are accurately counted by the machines, with less errors and faster processing of deposits from departments located throughout the campus.

- 5.4 Provide examples of how the strategic action plans in the last cycle contributed to the continuous quality improvement of your department/office.

Installation of standing desks and new chairs has resulted in an overall feeling of safety and has increased efficiency of staff.

The new currency counter is able to determine if different dollar amounts are on the bills, which will help to minimize errors.

- 5.5 In cases where resources were allocated toward strategic action plans in the last cycle, how did the resources contribute to the improvement of the department/office?

- 5.6 If funds were not allocated in the last review cycle, how did it impact your department/office?

## 6.0 Strategic Action Plans (SAP)

Using the tables below, list the strategic action plans (SAPs) for your program. These plans should follow logically from the information provided in the self-study. Use a separate table for each SAP.

SAPs for this three-year cycle:

STRATEGIC ACTION PLAN # 1	
Strategic Action Plan Name:	Reduce student receivable balance to properly reflect financial position on the college's financial statements.
List College goal/objective the plan meets:	College Goal #: Objective #:
Briefly describe the SAP, including title of person(s) responsible and timeframe, in 150 words or less.	The accounts receivable balance is due to non-payment of registration fees or returned check charges. A student's account is placed on hold in an attempt to collect the monies. After one year, it is unlikely that the student will pay the fees. The fees are written off and notices are sent to the student and to the State Chancellor's Office in an attempt to collect the monies owed to the college through state refunds, lottery winnings or unclaimed property proceeds that the student would receive.
What <i>Measurable Outcome</i> is anticipated for this SAP?	The accounts receivable balance will be reduced by 10%, and the financial statements will show a more accurate amount that can be collected.
What specific aspects of this SAP can be accomplished without additional financial resources?	All
If additional financial resources would be required to accomplish this SAP, please complete the section below. Keep in mind that requests for resources must follow logically from the information provided in this self-study.	



Type of Resource	Requested Dollar Amount	Potential Funding Source
Personnel		
Facilities		
Equipment		
Supplies		
Computer Hardware		
Computer Software		
Training		
Other		
<b>Total Requested Amount</b>	None	

STRATEGIC ACTION PLAN # 2		
Strategic Action Plan Name:	Replace Photocopier	
List College goal/objective the plan meets:	College Goal #: Objective #:	
Briefly describe the SAP, including title of person(s) responsible and timeframe, in 150 words or less.	The machine that is currently used is outdated and often malfunction. It makes loud grinding noise when printing 2-sided and skips pages when scanning. It often requires new parts to repair the machine.	
What <i>Measurable Outcome</i> is anticipated for this SAP?	It will reduce service calls while meeting the needs of office environment.	
What specific aspects of this SAP can be accomplished without additional financial resources?	None	
If additional financial resources would be required to accomplish this SAP, please complete the section below. Keep in mind that requests for resources must follow logically from the information provided in this self-study.		
Type of Resource	Requested Dollar Amount	Potential Funding Source
Personnel		
Facilities		
Equipment	6,500	
Supplies		
Computer Hardware		
Computer Software		
Training		
Other		
<b>Total Requested Amount</b>	6,500	

## **7.0 Long Term Plans**

Describe the long-term plans (four-six years) for your program. Please consider future trends in your narrative. Identifying financial resources needed for these plans is optional.

1. To have a conference room. A separate place for auditors to perform their interim/annual audit is needed. In the past, auditors used a conference table in the Bookstore which had easy access to the Bursar's office. Since the Bookstore was outsourced to Follet, we can't access that area anymore. Also, the auditors need a manager and staff to help them locate and verify information and documentation. Therefore, it's essential that the Bursar's office needs a separate place for auditors.

2. To have a safe place/room to store previous year financial statements, payment packages and other relevant backup documents. Currently, we are using an electric panel room to store these documents which is not safe. Also, the sight of room being fully covered looks messy and disorganized.

7.1 Describe in detail your need for additional resources as listed above (if applicable)

## **8.0 Self-Study Summary**

This section provides the reader with an overview of the highlights, themes, and key segments of the self-study. It should not include new information that is not mentioned in other sections of this document.

The Bursar's Office supports the College's Mission, Vision, Core Values and Goals by providing oversight and control safeguards over club/trust accounts. We assist students with the payment of registration fees and process refunds. The Bursar's Office also administers local and state awarded scholarships and third party payments. Receiving payments from students helps to ensure that students are not dropped from their classes, and administering scholarships and other payments helps to ensure that books, supplies and other related items are available to the students.

The Bursar's Office oversees Third Party Payments and Scholarships that are provided/awarded to students by other agencies to provide for the students' educational needs, including registration payments, books and supplies, and other related expenses.

The Bursar's Office processes refunds to students caused by dropped/cancelled classes and when another agency has paid for the student's classes (such scholarships, fee waivers, veteran's benefits).

The Bursar's Office processes payments to vendors and daily transactions for the Box Office, Cosmetology, Auto Shop, Library and Associated Students. The Bursar's Office processes payments to vendors and deposits of monies collected by various departments resulting from fundraising and other campus activities.

## 9.0 Publication Review

Fullerton College is committed to assuring integrity in all representations of its mission, programs, and services. As such, during the program review self-study process departments/offices are required to document their publications (websites, brochures, magazines, pamphlets, etc.) that are used to promote programs and services to the campus community and community at-large. This review should specify when the publication was last reviewed, if the information in the publication is accurate, and if the information correctly represents the college's mission, programs, and services.

Information on the college's graphic standards is available here: <http://news.fullcoll.edu/campus-communications/web-help/graphics/>.

In the far right column please provide the URL where the publication can be accessed. If it cannot be accessed via the Internet, please provide a sample of the publication with your program review self-study. If you have any questions about what type of publication should be included, please contact Lisa McPheron, Director of Campus Communications at [lmcpheon@fullcoll.edu](mailto:lmcpheon@fullcoll.edu).

For publications that you have identified as inaccurate, please provide the action plan for implementing corrections below.

Publication	Date last reviewed	Is the information accurate?	URL of publication
Bursar's Office website	11/28/22	Yes	<a href="http://fcbursar.fullcoll.edu/">http://fcbursar.fullcoll.edu/</a>

## Routing & Response Page

Originator → IMS → Program Review Chair → Appropriate President's Staff Member

**Originator:** *Electronically submit completed Program Review to Division Dean/IMS for review.*

**Appropriate Immediate Management Supervisor (IMS):** *Select one and provide response if necessary. Forward electronically to appropriate Vice President's Office.*

### RESPONSE

Printed name of IMS

Title

Date

*I concur with the findings contained in this Program Review.*

*I concur with the findings contained in this Program Review with the following exceptions (include a narrative explaining the basis for each exception):*

*Area of exception:*

---

---

*I do not concur with the findings contained in this Program Review (include a narrative explanation):*

---

---

**Appropriate President's Staff Member:** *Print Program Review, sign, and route both hard copy and electronic version to Program Review Chair.*

### ACKNOWLEDGING RECEIPT

Printed Name

Signature

Title

Date



## Fullerton College Mission Statement

### MISSION

Fullerton College advances student learning and achievement by developing flexible pathways for students from our diverse communities who seek educational and career growth, certificates, associate degrees, and transfer. We foster a supportive and inclusive environment for students to be successful learners, responsible leaders, and engaged community members.

### VISION

Fullerton College will transform lives and inspire positive change in the world.

*Approved by Fullerton College  
President's Advisory Council and  
accepted by President Schulz  
May 2017.*

### VALUES

#### Community

We promote a sense of community that enhances the well-being of our campus and surrounding areas.

#### Diversity

We embrace and value the diversity of our entire community.

#### Equity

We commit to equity for all we serve.

#### Excellence

We honor and build upon our tradition of excellence.

#### Growth

We expect everyone to continue growing and learning.

#### Inclusivity

We support the involvement of all in the decision-making process.

#### Innovation

We support innovation in teaching and learning.

#### Integrity

We act in accordance with personal integrity and high ethical standards.

#### Partnership

We work together with our educational and community partners.

#### Respect

We support an environment of mutual respect and trust that embraces the individuality of all.

#### Responsibility

We accept our responsibility for the betterment of the world around us.