



San Bernardino Community College District  
DSO Planning and Program Review Subcommittee  
March 14, 2023  
10:30 am-12:30 pm Pacific Time

- I. CALL TO ORDER**
- II. CONSENSUS APPROVAL OF MINUTES**
  - A. 02-14-2023 DSOPPRS Meeting Minutes
- III. FOUR-YEAR SELF-EVALUATION FOR BUSINESS SERVICES**
  - A. 2017-18 Business Services District Program Review
  - B. Four-Year Self-Evaluation Rubric
- IV. FUTURE AGENDA ITEMS**
- V. NEXT MEETING**

April 11, 2023, at 10:30 a.m.  
Via Zoom: <https://cccconfer.zoom.us/j/96157400569>
- VI. ADJOURNMENT**



## DSO Planning & Program Review Subcommittee

Meeting Minutes – February 14, 2023, 10:30 a.m.  
Via Zoom: <https://cccconfer.zoom.us/j/96157400569>

	Present	Absent		Present	Absent
Christopher Crew (DSO)	X		Michele Jeannotte (HR & PD)	X	
Jason Brady (ESSS)	X		Al Jackson (HR & PD)	X	
Heather Ford (DSO)	X		Larry Strong (FAM)		X
Aysia Brown (HR & PD)	X		Marcela Navarro (HR & PD)	X	
Roger Robles (ESSS)	X		Erika Menge (FAM) proxy Krystal Trussell	X	
Steve Sutorus (FAM)	X		Deanna Krehbiel (ESSS)	X	
Ben Holland (FAM)		X	Laura Van Genderen (ESSS)	X	

Guests:

### I. CALL TO ORDER

C. Crew called the meeting to order at 10:34 a.m.

### II. APPROVAL OF MINUTES FROM 12-13-2022

Approved by consensus.

### III. EDCT RESOURCE REQUEST CONVERSATION

D. Krehbiel presented EDCT is requesting fencing the parking lot. EDCT has transitional work crews. These crews required SBCCD to rent vans and purchase portable pot trailers. The vans and trailers are insured by the district and need to be fenced in at night as they are easily stolen. Currently, EDCT has a temporary agreement with the public safety school behind the Del Rosa site to park the vans and trailers within their fenced parking lot at night.

EDCT is requesting fencing for the parking lot at the Del Rosa site to protect SBCCD's liability.

One time cost of \$160,000.00. There is no regular maintenance required.

The transitional work crews teach individuals with barriers how to work, how to work with peers, and employer expectations leading to permanent employment. In addition, EDCT connects these participants to the colleges. EDCT serves approximately 75 per program for a total of 150 individuals per year. Should EDCT receive another 5 crews, this will increase to nearly 370 individuals per year generating a potential 36 FTES enrollment for the district per year.

Securing equipment for the program provides longterm viability and allows SBCCD to create opportunities for program participants to enroll at its colleges and generate FTES for the District.

If the vans and/or trailers are stolen, SBCCD will be required to replace them. The vans are rented and cost \$50,000 per van. The trailers are the property of SBCCD and cost \$17,000 each. Currently, SBCCD rents 4 vans and owns 4 trailers. That number can increase to 9 vans and 9 trailers.

In addition, SBCCD could lose the program which would reduce access to the colleges.

District and College Objectives:

DR.5  
DR. 10  
CS. 3  
CS. 4  
SBS.1

D. Krehbiel will submit her justification of the District and/or Campus Master Planning relation.

J. Brady recommended providing reasoning as to why a grant will not suit this need.

A. Jackson recommended provided a visualization of the fencing and will it be a large enough physical barrier to prevent climbing. Include specific details of the fencing. A. Jackson recommended including appropriate lighting and cameras. PD would be able to monitor the cameras.

C. Crew recommended including protection of SBCCD's investment of the solar and charging stations that are currently in place.

J. Brady recommended including there is a high thief demand (target-rich environment) of stealing catalytic converters, stealing gas, and port-a-pot trailers.

J. Brady recommended conversations regarding facilities and maintenance. Also, are there any other departments that should be included and communicated with prior to submittal (ex: maintenance and facilities and/or safety and PD).

A. Jackson recommended reviewing existing parking lots and fencing mechanisms with a roller entrance. In addition, include photograph of vans and trailers.

C. Crew recommended playing up innovation and the safety component. Efficiency with PD and facilities, etc. Spell out connections wherever they exist.

#### **IV. RESOURCE REQUEST RUBRIC**

J. Brady reviewed the draft rubric and clarified this is chiefly what is missing from the submitted request to strength the request for final submittal. Considering adding to the rubric if other departments need to be involved.

The committee agreed to delete the total score at the bottom of the rubric.

All committee members verbally approved the resource request rubric.

#### **V. DISCUSSION OF HOW TO APPLY RESOURCE REQUEST RUBRIC TO THE EDCT RESOURCE REQUEST**

C. Crew reviewed EDCT's request and the newly approved rubric.

#### **VI. REVIEW TIMELINE FOR THE REMAINDER OF THE SEMESTER**

- February 23** – Rankings taken to IEAC as information item
- March 1** – Rankings taken to Academic Senate as an information item
- March 7** – Rankings taken to Chancellors Council as an information item
- March 14** – Rankings taken to Chancellors Cabinet for conversation

**VII. FUTURE AGENDA ITEMS**

Review of program review 4-year plans from TESS and FAM

**VIII. NEXT MEETING**

Next Meeting: Tuesday, March 14, 2023, at 10:30 a.m. Via Zoom: <https://cccconfer.zoom.us/j/96157400569>

**ADJOURNMENT**

Meeting adjourned at 11:54 a.m.

Final meeting minutes approved by DSPPRS \_\_\_\_\_, 2023

Heather Ford, Senior Executive Administrative Assistant  
SBCCD, Office of the Chancellor  
Committee Support

NOT YET APPROVED

## Plans for Business Services >> 2017 - 2018 Business Services District Program Review

**Name :** 2017 - 2018 Business Services District Program Review

**Principal Preparer :** Steve Sutorus

**Planning Participants :** Steve Sutorus

**Version:** 4

**Group:** 2017 - 2018

**Type:** District Program Review

**Last Modified On:** 12/7/2017 12:51:52 PM

**Last Modified By:** Steve Sutorus

**State:** Submitted (**Finalized**)

**State By:** Steve Sutorus

### Instructions

#### 1. Mission

- a. Assume the reader knows nothing about your unit. Please describe concisely its mission.

Support District missions by acquiring goods and services efficiently and cost-effectively.

#### 2. Description

- a. Please describe concisely the following characteristics of your unit. Feel free to use both narrative and quantitative information.
- i. Purpose
  - ii. Functions or services
  - iii. Clientele(s)
  - iv. Value of your services to the clientele(s), the Colleges, and the District
  - v. Organizational structure and number of personnel by function
  - vi. Annual budget by object code for the last three years
  - vii. Hours of operation, location, and other pertinent service characteristics
  - viii. Significant changes, if any, since the last program review

- 1-3. Perform all procurement and business services for the District and the Colleges, and we support and advise all departments during the procurement process.
4. Provide proficient procurement services, so the District and Colleges may operate cost-effectively and timely.
5. A Business Manager manages all procurement and business services functions; a Project Analyst provides support for all business service functions, including contracts and insurance; a Purchasing Agent and Purchasing Technician provide support for all purchasing functions; Warehouse Technicians provide support for shipping and receiving functions for the District and San Bernardino Valley College.
6. The annual budget by object code for the last three years is attached as a supporting document.
7. Our hours of operation are Monday through Friday, 8:00 AM to 5:00 PM at the District Office and Monday through Friday, 7:30 AM to 4:30 PM at the Warehouse facility.
8. N/A

### 3. Outcomes and Other Measures of Effectiveness

- a. Identify at least one essential measure of effectiveness for each major operation of the unit. (See Effectiveness Measurement Guidelines and Examples.)
- b. Include at least one baseline measure or measure of progress on a well-defined outcome.
- c. Include at least one measure showing effectiveness in responding to the Colleges' needs.
- d. For each measure, identify the assessment method you used.
- e. Please summarize the results of the measures you have applied. If results showing trends over time are available, please report them.

1. Service Outcome or Objective: Provide on-demand workshops on purchasing, contracts, and shipping/receiving procedures on topics which are timely or specifically requested. Measure: Percent of surveyed participants who are satisfied, very satisfied, or neutral with the workshops and learned at least one new concept. Our target is 90%. Assessment Method: Post Training Assessment Tool using questions that assess both the knowledge of purchasing processes they gained and their satisfaction with the workshops. Results: *Question on FY16 Assessment Tool - 93% were either Very Satisfied, Satisfied, or Neutral (a newer evaluation has not been completed).*

## 4. External Opportunities and Challenges

- a. Describe any external opportunities that might lead to unit improvement over the next three to five years.
- b. Describe any external challenges (e.g., legal requirements, budgetary constraints) that might limit operations or improvement over the next three to five years.

### External Opportunities

1. New ERP, Oracle, is intended to provide efficiencies to Business Processes.
2. District Wiki present the ability to develop automated and accessible training required for new and current Financial 2000 users. New Oracle system will require additional training.
3. Update the vendor list leading to more accurate email addresses to use to deliver POs electronically. Possibly use student workers to call and gather data.
4. Cooperative purchasing methods may allow for additional cost savings and elimination of time consuming formal bid processes.
5. Use scanning software ImageNow for cataloging certificates of insurance.
6. Research and possibly get legal opinion on using "non-wet" signature contracts.
7. Shorten approval path of PRs on campus and at District level - ongoing. This task will be part of new ERP implementation.
8. Purchasing to have E-Commerce credit line.
9. Consider Board of Trustees delegation to ease contract processing.

### External Challenges

1. Staffing of Business Services & Purchasing has not kept pace with the growth in the Colleges, which has caused our program to serve more students, faculty, and staff with the same amount of resources.
2. California State budget and internal politics presents budgetary constraints for the District and Colleges which continues to impact all essential operations.
3. Packing slips within shipments lack complete information, which delays delivery to departments.
4. District and College departments may inadvertently exclude vital information on contracts and requisitions, which may delay procurement of essential goods and services.
5. District and College planning practices may produce lengthy processing times as applied to organizational deadlines.
6. District and College departments are responsible for individual budgets, which may delay procurement of essential goods and services as legal and organizational requirements are applied to purchase requisitions.

7. The Procurement process is de-centralized to College and District departments to assess needs, seek informal quotes, and establish budgets.
8. With more grants and categorical program funding, procurement (as well as departments) need to understand funding terms and conditions.

## 5. Analysis and Evaluation

- a. Analyze the implications of the assessment results and external factors for your unit.
- b. In light of your analysis, what are your unit's main strengths?
- c. In light of your analysis, what are your unit's main weaknesses?

### Strengths

1. The Purchasing & Business Services staff demonstrates knowledge, expertise, and courtesy in the performance of their duties.
2. The Purchasing & Business Services staff is perceived as resourceful.
3. Customer service within Purchasing & Business Services has been recognized as increasingly improving over time.

### Weaknesses

1. Staff turnover at Colleges and District among those charged with purchasing and budgets.
2. There appears to be a significant misunderstanding of legal and organizational requirements in regards to procurement due to the lack of consistent communication and use of available resources.
3. SBCCD lacks a well-structured training program for new or promoted employees and on-going training for current staff and faculty.

## 6. Three-to-Five Year Vision

- a. Describe your unit as you would like it to be three to five years from now.

Purchasing & Business Services should be perceived as resourceful and knowledgeable about all aspects of the best practices and legal and organizational requirements of community college procurement. The procurement process, from with the department's identification of a need to the department's receipt of essential goods and services, should be timely, user-friendly, transparent, easily understood, cost-efficient and state-of-the-art. Purchasing & Business



Services should be perceived as accessible to staff and vendors and be customer-centric and timely with responses to inquiries and problems.

## 7. Impact on the Colleges and the District

- a. Describe the most significant relationships with other District operations and College operations.
  - i. What major impact does your unit have on them?
  - ii. .What major impact do they have on your unit?
- b. How do your mission, vision, and goals contribute to the Board Imperatives and the District and/or College mission, vision, strategic directions, and/or goals?

### **Procurement's Impact on Colleges & District:**

1. Accounts Payable & Accounting: Purchasing & Business Services produces the contract, purchase order, and delivery documentation necessary to remit payments to vendors timely; maintains asset and contract documentation necessary for internal and external audits; and provides ongoing advice regarding procurement methods.
2. All College & District Departments: Purchasing & Business Services provides on-going assistance during procurement process; processes all contracts and purchase requisitions; issues emergency purchase orders to ensure safe learning and working environments.
3. All San Bernardino Valley College Departments and District Departments: Deliver goods to departments; maintain warehouse facility; and process surplus of obsolete equipment and scrap.

### **Colleges' and District's Impact on Procurement:**

1. Procurement relies on the complete, timely, and efficient preparation and approval of all purchase requisitions at the College and/or departmental level before coming to Purchasing.
2. Procurement relies on the complete, timely, and efficient preparation and approval of all contract documentation at the College and/or departmental level before coming to Business Services.
3. Procurement relies on the complete, timely, and efficient preparation and approval of budget transfers at the Colleges and District Accounting.
4. Procurement relies on the adequate departmental staffing and working hours of the Colleges and District to ensure timely and efficient delivery of goods.
5. District leadership must understand Fiscal Services' workload impact when bringing in new grant programs.

### Impact on Board Imperatives, missions, visions, strategic directions, and/or goals:

Procurement provides contract management; property, liability, and student insurance management; purchasing coordination; shipping and receiving coordination; warehouse facilities; capital asset management services, which illustrates that Procurement is an essential function of the third Board Imperative: Resource Management for Efficiency, Effectiveness, and Excellence.

## 8. Other Pertinent Information

- a. Include here any other information you regard as necessary for a full understanding of your unit.

Currently, in the areas of purchasing, contracts, and warehousing, there is only one staff member in each area of responsibility. Cross-training and or back-up in the event of illness, vacations, etc. does not exist. Business Services staffing levels has not kept pace with workload demands.

## 9. Goals, Objectives, Action Plans, and Resource Requests

- a. Goals (with priority rank) over the next three years
- b. Objectives (with priority rank) under each Goal
- c. Principal Activities under each Objective, if available
- d. Timeline for completion of each Activity or Objective
- e. Person responsible for ensuring completion of each Activity or Objective
- f. Progress on or achievement of a given Goal or Objective does not necessarily require additional resources. For Goals and Objectives that do require resources, enter the following information:
  - i. Resources required to achieve Goals and Objectives over the next three years, with description and rationale for each
  - ii. Identification of associated Goals or Objectives
  - iii. Type of Resource
    - i. Expenditure Category
    - ii. One-time/Ongoing
  - iv. Estimated annual cost (or savings) for the next three years

- **1 - Goal - Improve procurement processes and procedures**

Seek and advocate for additional and expanded efficiencies in processing contracts, approving and processing purchase requisitions, and delivering materials and goods to departments.

**Priority Rank:** 1

**Objectives:**

- **1.1 - Objective - Streamline Requisition, Purchasing and Contract Processes via new ERP, Oracle.**

Seek and advocate for additional and expanded efficiencies with developing and processing contracts and purchasing activity at the Colleges' and District's departments. This is an on-going objective - activities will be updated as needed.

**Priority Rank:** 1

**Start Date:** 04/16/2010 **End Date:** 06/30/2019

**Responsible Person:** P, C, W

**Strategic Direction:** Goal 4: District Operational Systems

**Impact Type:** District Wide

**Institutional Learning Outcome:** Not Applicable

- **1.2 - Objective - Update Vendor Application**

**Priority Rank:** 2

**Start Date:** 07/01/2016 **End Date:** 06/30/2019

**Responsible Person:** All Staff

**Strategic Direction:** Goal 4: District Operational Systems

**Impact Type:** District Wide

**Institutional Learning Outcome:** Not Applicable

**Actions/Activities:**

- **1.2.a1 - Collect banking information (ACH) from vendors**

Collect banking information (ACH) from vendors and add to vendor database in Oracle in order to achieve goal of 100% vendor participation.

**Start Date:** 07/01/2015 **End Date:** 06/30/2019

**Responsible Person:**

Purchasing Agent and Purchasing Technician

- **1.3 - Objective - Complete Fixed Assets Inventory**

**Priority Rank:** 3

**Start Date:** 07/01/2015 **End Date:** 06/30/2019

**Responsible Person:** All Staff

**Strategic Direction:** Goal 4: District Operational Systems

**Impact Type:** District Wide

**Institutional Learning Outcome:** Not Applicable

• **2 - Goal - Efficiently communicate procurement processes and procedures**

**Priority Rank:** 2

**Objectives:**

○ **2.1 - Objective - Expand Information Resources. Training for new ERP, Oracle.**

Improve and expand self-help resources, documentation, and training available to end users in order to increase consistency in information given to end users and to encourage continuous learning for staff and faculty.

**Priority Rank:** 4

**Start Date:** 04/16/2010 **End Date:** 06/30/2019

**Responsible Person:** P, C, W

**Strategic Direction:** Goal 3: Partnerships of Strategic Importance

**Impact Type:** District Wide

**Institutional Learning Outcome:** Not Applicable

**Actions/Activities:**

▪ **2.1.a1 - Maintain Website**

Review content of current webpages and revise to keep current and user friendly. All web-based data should appear on District Wiki. Promote website in emails, trainings, and one-on-one discussions. New ERP, Oracle will require website updates and maintenance.

**Start Date:** 04/16/2010 **End Date:** 06/30/2019

**Responsible Person:** All Staff

▪ **2.1.a2 - Workshops**

Workshops for end users to have continuous learning. One-on-one training sessions (either in-person or via phone) are the preferred delivery method to fulfill on-demand requests. Training session will be recorded for automated access.

New ERP, Oracle will require a high volume of training activities.

**Start Date:** 04/16/2010 **End Date:** 06/30/2019

**Responsible Person:** Purchasing Agent and Project Analyst

○ **2.2 - Objective - Improve communications and customer service**

Utilize open and business-appropriate communications to facilitate trust-building, positive working relationships, and an improved end user experience.

**Priority Rank:** 5

**Start Date:** 04/16/2010 **End Date:** 06/30/2019

**Responsible Person:** All Staff

**Strategic Direction:** Goal 3: Partnerships of Strategic Importance

**Impact Type:** District Wide

**Institutional Learning Outcome:** Not Applicable

**Actions/Activities:**

▪ **2.2.a1 - Replying to Communications**

All staff will reply to emails and phone calls promptly and courteously, preferably within less than one (1) business day.

**Start Date:** 04/16/2010 **End Date:** 06/30/2019

**Responsible Person:** All Staff

○ **2.3 - Objective - Develop Advisory Business and Fiscal Services Taskforce**

**Priority Rank:** 6

**Start Date:** 07/01/2016 **End Date:** 06/30/2019

**Responsible Person:** Sutorus

**Strategic Direction:** Goal 4: District Operational Systems

**Impact Type:** District Wide

**Institutional Learning Outcome:** Not Applicable

• **3 - Goal - Institutionalize Staffing Plan**

**Priority Rank:** 3

**Objectives:**

○ **3.1 - Objective - Prepare for succession planning, namely moving the Contracts Analyst position into a management position.**

**Priority Rank:** 7

**Start Date:** 07/01/2016 **End Date:** 06/30/2019

**Responsible Person:** Business Manager

**Strategic Direction:** Goal 3: Partnerships of Strategic Importance

**Impact Type:** District Wide

**Institutional Learning Outcome:** Not Applicable

## 10. Progress Report on Last Cycle's Goals, Objectives, and Actions

- a. Estimate progress to date on each of the last cycle's Goals, Objectives, and Activities.
- b. Any uncompleted Goals, Objectives, and Activities that are still important should appear in the Goals, Objectives, and Action Plans section above.

• **1 - Goal - Improve procurement processes and procedures**

Seek and advocate for additional and expanded efficiencies in processing contracts, approving and processing purchase requisitions, and delivering materials and goods to departments.

**Priority Rank:** 1

**Objectives:**

◦ **1.1 - Objective - Streamline Requisition, Purchasing and Contract Processes via new ERP, Oracle.**

Seek and advocate for additional and expanded efficiencies with developing and processing contracts and purchasing activity at the Colleges' and District's departments. This is an on-going objective - activities will be updated as needed.

**Priority Rank:** 1

**Original Start Date:** 04/16/2010 **Original End Date:** 06/30/2018

**Revised Start Date:** 04/16/2010 **Revised End Date:** 06/30/2018

**Responsible Person:** P, C, W

**Strategic Direction:** Goal 4: District Operational Systems

**Impact Type:** District Wide

**Institutional Learning Outcome:** -- Pick One --

**Status Code:** -- Pick One --

**Progress Description:**

◦ **1.2 - Objective - Update Vendor Application**

**Priority Rank:** 2

**Original Start Date:** 07/01/2016 **Original End Date:** 06/30/2018

**Revised Start Date:** 07/01/2016 **Revised End Date:** 06/30/2018

**Responsible Person:** All Staff

**Strategic Direction:** Goal 4: District Operational Systems

**Impact Type:** District Wide

**Institutional Learning Outcome:** -- Pick One --

**Actions/Activities:**

▪ **1.2.a1 - Collect banking information (ACH) from vendors**

Collect banking information (ACH) from vendors and add to vendor database in Oracle in order to acheive goal of 100%

vendor participation.

**Start Date:** 07/01/2015 **End Date:** 06/30/2018

**Responsible Person:**

Purchasing Agent and Purchasing Technician

**Status Code:** -- Pick One --

**Progress Description:**

**Measurements/Documentation of Progress:**

- o **1.3 - Objective - Complete Fixed Assets Inventory**

**Priority Rank:** 3

**Original Start Date:** 07/01/2015 **Original End Date:** 06/30/2018

**Revised Start Date:** 07/01/2015 **Revised End Date:** 06/30/2018

**Responsible Person:** All Staff

**Strategic Direction:** Goal 4: District Operational Systems

**Impact Type:** District Wide

**Institutional Learning Outcome:** -- Pick One --

**Status Code:** -- Pick One --

**Progress Description:**

- **2 - Goal - Efficiently communicate procurement processes and procedures**

**Priority Rank:** 2

**Objectives:**

- o **2.1 - Objective - Expand Information Resources. Training for new ERP, Oracle.**

Improve and expand self-help resources, documentation, and training available to end users in order to increase consistency in information given to end users and to encourage continuous learning for staff and faculty.

**Priority Rank:** 4

**Original Start Date:** 04/16/2010 **Original End Date:** 06/30/2018

**Revised Start Date:** 04/16/2010 **Revised End Date:** 06/30/2018

**Responsible Person:** P, C, W

**Strategic Direction:** Goal 3: Partnerships of Strategic Importance

**Impact Type:** District Wide

**Institutional Learning Outcome:** -- Pick One --

**Actions/Activities:**

- **2.1.a1 - Maintain Website**

Review content of current webpages and revise to keep current and user friendly. All web-based data should appear on District Wiki. Promote website in emails, trainings, and one-on-one discussions. New ERP, Oracle will require website updates and

maintenance.

**Start Date:** 04/16/2010 **End Date:** 06/30/2018

**Responsible Person:** All Staff

**Status Code:** -- Pick One --

**Progress Description:**

**Measurements/Documentation of Progress:**

■ **2.1.a2 - Workshops**

Workshops for end users to have continuous learning. One-on-one training sessions (either in-person or via phone) are the preferred delivery method to fulfill on-demand requests. Training session will be recorded for automated access.

New ERP, Oracle will require a high volume of training activities.

**Start Date:** 04/16/2010 **End Date:** 06/30/2018

**Responsible Person:** Purchasing Agent and Project Analyst

**Status Code:** -- Pick One --

**Progress Description:**

**Measurements/Documentation of Progress:**

○ **2.2 - Objective - Improve communications and customer service**

Utilize open and business-appropriate communications to facilitate trust-building, positive working relationships, and an improved end user experience.

**Priority Rank:** 5

**Original Start Date:** 04/16/2010 **Original End Date:** 06/30/2018

**Revised Start Date:** 04/16/2010 **Revised End Date:** 06/30/2018

**Responsible Person:** All Staff

**Strategic Direction:** Goal 3: Partnerships of Strategic Importance

**Impact Type:** District Wide

**Institutional Learning Outcome:** -- Pick One --

**Actions/Activities:**

■ **2.2.a1 - Replying to Communications**

All staff will reply to emails and phone calls promptly and courteously, preferably within less than one (1) business day.

**Start Date:** 04/16/2010 **End Date:** 06/30/2018

**Responsible Person:** All Staff



**Status Code:** -- Pick One --

**Progress Description:**

**Measurements/Documentation of Progress:**

- **2.3 - Objective - Develop Advisory Business and Fiscal Services Taskforce**

**Priority Rank:** 6

**Original Start Date:** 07/01/2016 **Original End Date:** 06/30/2018

**Revised Start Date:** 07/01/2016 **Revised End Date:** 06/30/2018

**Responsible Person:** Sutorus

**Strategic Direction:** Goal 4: District Operational Systems

**Impact Type:** District Wide

**Institutional Learning Outcome:** -- Pick One --

**Status Code:** -- Pick One --

**Progress Description:**

- **3 - Goal - Institutionalize Staffing Plan**

**Priority Rank:** 3

**Objectives:**

- **3.1 - Objective - Prepare for succession planning, namely moving the Contracts Analyst position into a management position.**

**Priority Rank:** 7

**Original Start Date:** 07/01/2016 **Original End Date:** 06/30/2018

**Revised Start Date:** 07/01/2016 **Revised End Date:** 06/30/2018

**Responsible Person:** Business Manager

**Strategic Direction:** Goal 3: Partnerships of Strategic Importance

**Impact Type:** District Wide

**Institutional Learning Outcome:** -- Pick One --

**Status Code:** -- Pick One --

**Progress Description:**

## 11. Process and Participants

- a. Describe briefly the main steps of the process that produced this report.
- b. List the name and function of each participant in that process.
- c. Include as many members of the unit as possible in the preparation and/or review of this document. It should not be the product of the manager alone or of a small proportion of unit members.
- d. Describe the plan for future assessment cycles, particularly if not all measures were applied in current cycle.

In December 2017, Business Services staff met to update all components of the Program Review document.

## 12. Supporting Documents

- [Business Svcs 3 Year Budget thru 063018.pdf](#)
- [Productivity Analysis.pdf](#)
- [RESULTS 2014-2015 District Oprns Satisfaction Survey.pdf](#)
- [PR Approval Analysis.pdf](#)

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**DISTRICT SERVICES PLANNING AND PROGRAM REVIEW  
Four-Year Program Self Evaluation Rubric**

	<b>Does Not Meet</b>	<b>Meets</b>
<b>Description of Program and Services</b>	The program <b><u>does not provide</u></b> a description of the program and its services.	The program <b><u>does provide</u></b> a description of the program and its services.
<b>Pattern of Service</b>	The program's pattern of service is <b><u>not related</u></b> to the needs of students, the campuses and the district or the program <b><u>does not discuss</u></b> the plans or activities that are in place to meet a broad range of needs.	The program <b><u>provides evidence</u></b> that the pattern of service meets the needs of students, the colleges and the district.  The program <b><u>discusses the plans or activities</u></b> that are in place to meet a broad range of needs.
<b>Impact on the Colleges and the District</b>	The program <b><u>does not identify</u></b> the most significant relationships it has with other District operations and College operations.	The program <b><u>provides evidence</u></b> of significant relationships with other District operations and College operations.
<b>Mission and Purpose</b>	The program <b><u>does not have</u></b> a mission statement, or it <b><u>does not clearly link</u></b> with the institutional mission.	The program <b><u>has</u></b> a mission statement, and it <b><u>links clearly</u></b> with the institutional mission.
<b>Service Area Outcomes</b>	Program <b><u>has not demonstrated</u></b> that it is continuously assessing Service Area Outcomes (SAOs)  Evidence of data collection, evaluation, and reflection/ feedback, and/or connection to area services is <b><u>missing or incomplete</u></b> .	Program <b><u>has demonstrated</u></b> that it has fully evaluated within a four-year cycle and is continuously assessing <u>all</u> Service Area Outcomes (SAOs)
<b>Accomplishments</b>	The program <b><u>has not detailed</u></b> department progress and accomplishments on goals and objectives, or <b><u>has not identified</u></b> how these accomplishments benefit students, the campuses, and the district.	The program <b><u>has detailed</u></b> department progress and accomplishments on goals and objectives, and <b><u>has identified</u></b> how these accomplishments benefit students, the campuses, and the district.
<b>Trends</b>	The program <b><u>has not identified</u></b> the new or continuing trends affecting it, or <b><u>has not addressed</u></b> how these trends will impact program planning.	The program <b><u>has identified</u></b> the new or continuing trends affecting it, and <b><u>has addressed</u></b> how these trends will impact program planning.

**DISTRICT SERVICES PLANNING AND PROGRAM REVIEW  
Four-Year Program Self Evaluation Rubric**

	<b>Does Not Meet</b>	<b>Meets</b>
<b>Opportunities and Challenges</b>	The program <b><u>does not incorporate</u></b> opportunities and challenges into planning.	The program <b><u>incorporates</u></b> opportunities and challenges into planning.
<b>Three-to-Five Year Vision</b>	The program <b><u>does not describe</u></b> how it would like to be in three-to-five years, or <b><u>does not use</u></b> this vision in its planning.	The program <b><u>does describe</u></b> how it would like to be in three-to-five years and <b><u>uses</u></b> this vision in its planning.
<b>Goals and Objectives</b>	The program <b><u>does not provide</u></b> goals and objectives, or <b><u>does not use</u></b> these goals and objectives in its planning.	The program <b><u>provides</u></b> goals and objectives and <b><u>uses</u></b> these in its planning.
<b>Productivity</b>	The data <b><u>does not show</u></b> an acceptable level of productivity for the program, or the issue of productivity is <b><u>not adequately addressed</u></b> .	The data <b><u>shows</u></b> the program is productive at an acceptable level.
<b>Analysis of Staffing Levels</b>	The program <b><u>has not provided</u></b> staffing numbers, or <b><u>has not provided</u></b> an analysis of its staffing levels.	The program <b><u>has provided</u></b> staffing numbers, and <b><u>has provided</u></b> an analysis of its staffing levels.

**QUESTIONS FOR THE COMMITTEE:**

**1. What service does this department provide to the District?**

**2. What is their top objective?**

**DISTRICT SERVICES PLANNING AND PROGRAM REVIEW  
Four-Year Program Self Evaluation Rubric**

**3. What area of the District does this office have the most direct impact on?**

**4. Where could this department improve?**

**5. Where is the greatest opportunity for growth (think about personnel or service)?**

**6. What is their stated short-term and long-term goal?**

**7. Does this department impact student success? If yes, please describe. If no, please provide a few ideas of how they might impact student success.**