

Entry #: 3 - Ann Jensen

Status: Incomplete

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2023-2024 REVIEW

OVERVIEW OF PROGRAM REVIEW AND PLANNING FOR NON-INSTRUCTIONAL PROGRAMS

Program Review is a self-study of your unit. For non-instructional program review, the definition of what is a unit varies based upon your division. A unit may be a department (e.g., Information Services, Institutional Research and Planning, Financial Aid), a program (e.g., EOPS, TRIO), or a division (Human Resource Services). The Vice Presidents for each division have identified/defined the units that will complete the review cycle.

Regardless of whether your unit is a program, department, or division, program review is about documenting the plans you have for improving Institutional Effectiveness in your area and sharing that information with the college community. Through the review of and reflection on key elements, Program Review and Planning identifies program strengths and strategies necessary to improve the operation of your area. With that in mind, please answer the following questions.

BASIC UNIT INFORMATION

Are you completing a Comprehensive or Annual PRP?

Comprehensive

Division Name

Finance & Administrative Services

Department Name

FAS Business Services

Program/Unit Name

---Business Services

Name of Person responsible for the Program/Unit

Ann Jensen

Website address(es) for your program(s)/unit(s)

Webpage URL 1

Unit webpage

<https://www.palomar.edu/businessservices/>

Please list all participants and their respective titles in this Program Review

Participant	Title
Ann Jensen	Director of Business Services
Amber Cross	Purchasing Services Supervisor
Debbi Claypool	Sr. Contract Administrator
Allen Young	Contract Administrator
Todd Wilcox	Buyer
Anna Morrison	Print Services Technician
Jeanette Haas	Mail Services Technician
Tony Payton	Warehouse Technician
Rick Greene	Warehouse Technician

PROGRAM/UNIT MISSION STATEMENT**What is your Program's/Unit's Mission Statement?**

To provide efficient and effective procurement, contract services, mail services, warehouse services, and supportive ancillary services to the staff, faculty, and administrators across the District to support our District and its diverse student populations.

Describe how your Mission Statement aligns with and contributes to the College's Vision and Mission.

The department's mission is to support student learning and achievement by providing the equipment, supplies, and services that employees and students require to allow educational activity to take place.

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PROGRAM/UNIT DESCRIPTION**Staffing**

In this section, you will identify how many faculty and staff support your program. This information is considered when you request permanent staff and faculty hires. It is also useful as you evaluate your program and the human resources and talent you have to support our students.

To help you answer questions in this section, you will need the link shown in red below. This form required a login and password to access. Please use your Palomar email and password to log in.

Link: [Permanent Faculty and Staff Count](#)

Full-Time Staff**Total Number of Full-time Staff**

10.00

Part-Time Staff**Total Number of Permanent Part-time Staff**

0.00

Number of Classified Staff

8.00

FTE of Part-time Staff (2x19 hr/wk=.95)

0.00

Number of CAST Staff

1.00

FTEF of Part-time Faculty

0.00

Number of Administrators

1.00

Number of Full-time Faculty

0.00

Describe additional temporary hourly or contract staff who support this unit and/or department. (Include FWS/District Student Workers/Veteran Student Workers)

2 part-time workers in Warehouse, 2 part-time workers in Print Services, 1 part-time worker in Mailroom, each are approximately 20 hours per week.

Have you experienced any changes in staff this past year? If so, please describe how the changes have impacted your operations.

- Two unfilled Senior Buyer positions that are both vacant presently. One vacancy has been ongoing for over 2 years, one employee was out on medical leave for many months then was terminated and never replaced.
- Buyer - One vacant position currently. The former employee was out on paid admin leave for multiple months, then quit; (replacement in process).
- The multiple Buyer vacancies have impacted workload on the single remaining Buyer and have led to the Purchasing Supervisor needing to perform the work of a Buyer, and the remaining Buyer we have is being overworked and stretched too thinly. The Supervisor is required to perform lower level duties, rather than what a supervisor should be doing (planning, enforcement, training, etc.) and the Director is performing duties that the Supervisor would ordinarily do, as opposed to the higher level work that needs to be accomplished. Burnout with staff is currently very high.

Other challenges:

- With the past retirement of a supervisor (D Cummins) who was in charge of Mailroom/Print Services and the fact this position was never replaced, as well as an additional staff person retiring (Print Services Tech), we have a situation where there is one full-time employee in the entire division in both the Mailroom, and in Print Services. If the full-time employees are out for any reason, work comes to a halt or the Director has to fill in where able as part-time helpers are often not available.
- We also have a 2-person Warehouse with no on-site supervisor to oversee their work. The two Warehouse staff are across campus from the rest of the team. This minimal staffing model in the Warehouse results in a situation where if one person is out, work comes to a stop with no deliveries being made; no courier runs; and no surplus may be picked up as one person has to be in the warehouse at all times due to continual incoming deliveries throughout the day.
- The division has no administrative support, which would be incredibly helpful to the area. This also over-extends the Director and/or Supervisor to perform additional clerical duties or find someone to perform these duties (e.g., entering requisitions) among staff who already have full workloads due to understaffing.

As part of the PRP cycle, Human Resource Services will provide Organizational Charts for all non-instructional units. Review the following organizational charts to answer the questions below.

- [Finance and Administrative Services](#)
- [Human Resource Services](#)
- [Instructional Services](#)
- [President's Office](#)
- [Student Services](#)

In reviewing your organizational structure, what are the strengths and opportunities this structure brings to the department, division, and College?

The org chart is inaccurate, and is missing many areas of responsibility for Business Services, such as Mail Services and Ancillary Services (Bookstore/Food Services). The Director name is incorrect, and other staff names are inaccurate and need to be updated. Although there is a full-time vacant position listed for Admin Specialist II, I have been informed that there is no budget for a full-time position, and it will be shared with the Fiscal division. I would prefer this be a full-time position for Business Services alone, but will take even part-time at this point due to staffing shortages in my area.

In reviewing the organization structure, are there areas that could be improved if you were structured differently (i.e., efficiencies, communications/collaboration with the College, needs, etc.)?

If areas of my department that are missing were included, that would be helpful. Also, there are positions that are included in the org chart where I am told there is no budget, but these positions are much needed.

Reorganization is sorely needed in Purchasing/Contracts: There are 2 Sr. Buyers listed, that I would replace with one "regular" Buyer, but would reorg this part of my department (Purchasing) to upgrade these three Buyer positions and include the ability of all staff to perform bids so this does not rest only with the Supervisor or myself to manage. Buyers have a heavy responsibility to assure that we are following public contract code, Ed. Code, government code, and Board policy/APs. The weight of their duties does not remotely reflect their current pay grade. I was informed that several years ago, these positions were downgraded for some reason that remains a mystery. I would also upgrade the Supervisor position to a Manager and have this position oversee the Contracts staff in addition to Purchasing staff. Contracts staff would have an additional duty (processing contract POs) to their plates to increase efficiency and decrease lag time, and would be supported by the Manager rather than the Director.

We also need an on-site supervisor for the Warehouse and Mailroom, combined together in the same physical location. With a one-person mailroom and a two-person warehouse, the addition of a supervisor would assure that services do not cease if one person is out in either area. The manager would back up the team, and all team members would back each other up. This new position would also support the surplus process that is in desperate need of attention and refining.

Program/Unit Description**Who utilizes your services?**

All departments on campus; all centers.

What services does your program/unit provide (describe your program/unit)?

Purchasing: This team is responsible for coordinating the procurement of goods and services for all academic and administrative departments across all District locations. The department is engaged in tasks such as processing requisitions, ensuring appropriate procurement approvals, securing competitive quotes or bids to obtain maximum value from the expenditure of District funds, identifying vendor sources, encouraging competition among vendors, reviewing contract language and agreements, issuing purchase orders, maintaining vendor files, and advising departments and vendors on District and legal requirements for purchases. Staff maintains the vendor/supplier database, updates vendor profiles, assures requisitions are properly authorized, prepares quality and quantity specifications for items/services to be purchased, issues purchase orders, reviews contract and agreement language, etc.

Contracts: This team is responsible for the preparation and management of all aspects of vendor/contractor agreements. Staff engages in tasks such as reviewing specifications for contracts, refining language in vendor contracts, recommending changes to agreements to mitigate risk to the District, identifying and preparing accurate agreements, sending agreements for signature, preparing Board meeting documentation, performing bids and RFP/RFQs, and assuring that all legal requirements are followed in all areas (Ed Code, Public Contract Code, Government Code, DIR regulations).

Mailroom: This area is responsible for all sorting all incoming mail for the District for distribution, processing all outgoing mail and special delivery items. Staff in this area is engaged in tasks such as reviewing, sorting, and distributing incoming mail, using special machinery (folder/stuffer, postage machine) to process outgoing mail, and using a database to bill departments for their use of these services.

Warehouse: This area is responsible for the internal distribution of incoming pages, courier services between centers, the pick-up

and coordination of surplus items, surplus auctions, and the storage of certain supplies (e.g., paper) for Districtwide use. Staff in this area is engaged in task such as delivery coordination, assuring that incoming deliveries are checked in, assuring that departments where deliveries are made sign for their items, preparing and organizing surplus storage area prior to auctions, internal deliveries on the San Marcos campus for incoming items, and making courier deliveries to the centers.

Print/Duplication: This area is responsible for printing and duplication services across the District. Staff in this area are engaged in tasks such as working with departments and Creative Services to assure that printed items are prepared on the correct media, maintenance of equipment, stocking supplies for internal copier program (e.g., paper, toner), managing the Districtwide copier program, the installation of specialty printed items (e.g., window coverings), management of the CometCopy program, and the billing of copier services back to departments.

Ancillary Services: Bookstore services are currently outsourced to Follett, and Food Services are currently outsourced to California Dining Services. Both ancillary services have the oversight of the Director of Business Services and there is a newly formed committee (Ancillary Services Committee) to assure that there is a shared governance role in these two areas.

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PROGRAM/UNIT ASSESSMENT

SERVICE AREA OUTCOME ASSESSMENT

GOT SERVICE AREA OUTCOMES?

Outcomes are statements written in support of student learning to show direct support (instruction) or indirect support (services) provided on campus. Assessment is the way we measure how well we are achieving our outcomes.

For non-instructional areas, outcomes are called Service Area Outcomes (SAO).

So, what is an SAO?

A Service Area Outcome (SAO) is a statement about what a client will experience, receive, or know as a result of a given service. Clients can be students, faculty, staff, or community members.

As part of our three-year planning and review cycles, all non-instructional units are asked to:

- identify at least two SAOs,
- develop a plan and assess their SAOs,
- reflect on the results, and
- take action, as necessary.

Palomar uses Nuventive Improve as our official repository for SLO and SAO Assessment information.

Review and/or define your SAOs and assessment plans and ensure they are entered in Nuventive Improve by doing the following:

- 1) Login to Nuventive Improve through the Palomar College [Single Sign-on](#).
- 2) Check your SAOs for **currency** and **sunset** any SAOs if you no longer plan to assess them.
- 3) Revise or edit your current SAOs by revising their wording and/or updating the assessment method and/or assessment results, if appropriate.

NEED HELP?

Nuventive Improve:

- 1) If you need help with anything Nuventive Improve related such as login, unit identification, entering SAO info, contact Marti Snyder at msnyder2@palomar.edu.
- 2) Check out this video on how to enter SAOs in Nuventive Improve: <https://youtu.be/b1sRa68wm4c>

Defining and Assessing SAOs:

Not sure if your SAOs make the grade? Need some help writing an SAO? Not sure about how to assess your SAOs?

- 1) [Hartnell's SAO Guide](#) is a nice resource! Thank you Hartnell!
- 2) Contact Michelle Barton at mbarton@palomar.edu. We have a resource support team to help.

A template for entering SAOs can be found on the [IR&Ps Non-instructional Program Review and Planning website](#)

SERVICE AREA OUTCOMES TEMPLATE					
Date Identified or Last Reviewed	Description of SAO (What is your SAO?)	Assessment Method (How will/ do you measure or assess it?)	Criterion (How will/ do you know if you met the outcome?)	Date of Assessment	Date of Next Assessment
1)					
2)					
3)					
4)					

Are all of your unit's SAOs and assessment plans UPDATED and ENTERED in Nuventive Improve?

Yes

SAOs SUMMARIES AND REFLECTIONS

Each of your program/unit SAOs should be assessed at least once every three years. For each SAO in Nuventive Improve/ summarize what you learned from the assessment and what improvements you have implemented or plan to implement as a result of your SAO assessments.

SAOs

SAO 1**SAO Title**

Processing and Accuracy

Faculty and staff consistently receive orders that are accurate and within the timeline established by each department in Business Services.

Assessment Status

Not assessed

If you have not completed SAO assessments, document why (e.g., SAO was assessed last year).

No previous comprehensive information was available for Business Services.

Next planned assesment

Fall, 2024

SAO 2**SAO Title**

Customer Service

Faculty and staff receive respectful, responsive help with questions or requests for information.

Assessment Status

Not assessed

If you have not completed SAO assessments, document why (e.g., SAO was assessed last year).

No previous comprehensive information was available for Business Services.

Next planned assesment

Fall, 2024

SAO 3**SAO Title**

Training and documentation

Faculty and staff will receive consistent training and documentation for department processes, specifically in the Purchasing and Contracts areas

Assessment Status

Not assessed

If you have not completed SAO assessments, document why (e.g., SAO was assessed last year).

No previous comprehensive information was available for Business Services.

Next planned assesment

Fall, 2024

OTHER ASSESSMENT DATA

Quantitative Data

List all other quantitative and/or qualitative measures you use to track, monitor, and/or evaluate the effectiveness of your program/Unit.

Measures, Descriptions, and Annual Values

Measure 1

Name of Measure

Survey

Description of Measure

Survey questionnaire

Year

Year

Year

Year

n/a

Value

Value

Value

Value

n/a

List values for years listed immediately above. Select "+ Add Measure" below to insert all measures, values, and descriptions.

Measure 2

Name of Measure

Training and documentation

Description of Measure

Ongoing training in Purchasing and Contracts, and documentation (handbooks) to support staff

Year

Year

Year

Year

2024-25

Value

Value

Value

Value

List values for years listed immediately above. Select "+ Add Measure" below to insert all measures, values, and descriptions.

Reflect on your quantitative data and summarize your findings or interpretations.

There is no data available from the past.

Qualitative Data

Describe any qualitative measures you use and summarize the results.

There is no data available from the past.

What improvements have you implemented or plan to implement as a result of your assessment of quantitative and/or qualitative data described above?

n/a

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ACHIEVEMENTS AND OTHER RELEVANT INFORMATION

Describe your program's achievements this past year. Where possible, describe how these achievements are related to our students and their success!

The department has been able to maintain services, even with much reduced staffing. Business Services was able to process POs and Contracts in a timely manner, despite critical shortages in staff.

Purchasing processes documentation is being finalized and a handbook will be shared with the District by the end of April 2024.

Contracts processes will be updated with a revised handbook shared to the District by the start of Fall 2024.

Describe any recent changes in legislation, policies, procedures, processes, and/or technology (software and hardware) that have impacted or will impact your program/unit. What effect will these changes have on your program/unit?

- The District recently purchased Planet Bids (online bidding portal) that has had a learning curve to implement. This implementation has help the department with efficiency related to bids, RFPs and RFQs.
- Processes were previously not well defined, leading to countless instances of noncompliance with current regulations for both purchases and contractual agreements. Once released, this will lead to an increase in compliance by end users.
- Training was not done for many years, but is currently being offered. This has led to an increase in compliance by end users.

In addition to (or in response to) the changes listed above, what board policies, procedures, and processes need to be updated, created, or deleted?

ALL Board policies related to purchasing and contracts are in need of edits, changes, and corrections. A new BP is needed to point to the Purchasing Handbook as well.

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PROGRAM/UNIT EVALUATION AND THREE-YEAR PLANNING

Program Evaluation and Planning is completed in two steps.

First, you will complete an overall evaluation of your unit drawing from your unit assessment data.

Second, working from that evaluation, you will establish your goals for the upcoming three years.

Section 1: Overall Evaluation of Program

Reflect on your unit, the results of your assessments in Part 2 above, and your vision for the future. Then, working together answer the following questions. Summarize your answers in the grid below.

- 1.What are our greatest strengths?
- 2.What are our best opportunities?
- 3.What is our preferred future, what do we aspire to do?
- 4.What are the measurable results that will tell us we've achieved that vision of the future?

Section 2: Establish Goals and Strategies for the Next Three Years

Once you have completed your overall evaluation, identify a set of goals and strategies for accomplishing them for this upcoming three-year planning cycle. Use the template in Section 2 below to document your goals, strategies, and timelines for completion. Goals should be Specific, Measurable, Attainable, Relevant, and Time –Specific (SMART). Following the goal template below will help you create SMART goals!

OVERALL EVALUATION OF PROGRAM

Discuss your Program's/Unit's Strengths, Opportunities, Aspirations, and Results (SOAR) and summarize your discussion below.

Strengths:

Teamwork: Cohesive team that works well together.

Commitment: Ability to prioritize concerns and issues, for quick resolution.

Integrity: Desire and ability to perform work that is ethical and do the job correctly.

Knowledge: Competent and knowledgeable team who are committed to keeping current on all statutory and District regulations/policies.

Opportunities:

Staffing: Team needs to be sufficiently staffed to support the college or burnout and lowered job satisfaction will occur.

Increase Communication: Add additional training and communicate resources available to staff to better support college community.

Staff Development: Further develop current staff with external development, as well as internal development in the areas of cross training.

Aspirations:

Filling open staff positions to support the District and department in success.

Update website to be more user friendly and supportive of resources available.

Add software to increase efficiencies (contract management, DocuSign, etc.) as well as explore modules in PeopleSoft that could support more efficient contract and PO processing.

Results:

Once staffing is solved, it will result in more effective internal controls, decreased processing time, increased job satisfaction within team, increased satisfaction for stakeholders outside of department, and more effective management of district resources.

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PROGRESS ON PRIOR PRP GOALS

List current or prior PRP goals your unit has been working on and provide an update by placing an "X" in the appropriate status box.

Click on "+Add Goal" below for each additional goal.

[Click here for previous PRPs with goal information.](#)

Prior PRP Goals

Goal 1**Brief Description**

n/a - no prior goals

Choice

Completed

Add any comments related to your work on prior goal. Include outcomes or progress, successes and challenges, and reason(s) for eliminating a goal, if applicable.

No prior goals found. The link to "business services" PRP from past years brings up Campus Police.

ESTABLISH GOALS AND STRATEGIES FOR THE NEXT THREE YEARS

In the previous sections of this PRP, you identified opportunities for improvement. Using these opportunities, develop 3-year [SMART goals](#) for your department. Goals should be Specific, Measurable, Attainable, Relevant, Time-Specific. Ensure your goals align with the mission of your department and/or [the College's Vision Plan 2035](#).

Please list all discipline goals for this three-year planning cycle.

If you require any additional resources beyond your exiting budget, please be sure to request those resources in the next section titled "Resources".

New Goals: Please list all goals for this three-year planning cycle.

Goal 1

Description

Reorganize the Purchasing and Contracts areas for increased efficiency. This will include training the Contracts staff to source/create contract POs, downgrading the Sr. Buyer position to Buyer, and upgrading Buyer positions to account for the level of knowledge required, and upgrading the Purchasing Supervisor to Manager of Business Services in order to oversee both contract and purchasing staff more effectively. Also, once the Senior Contract Administrator retires, downgrade that position to Contract Administrator with both employees in this area sharing all workload/functions.

How will you complete this goal? Include strategies and a timeline for implementation.

Reorganization of Purchasing/Contracts areas of Business Services. Timeline: To be started by January, 2025 and completed by June, 2025.

Outcome(s) expected (qualitative/quantitative)

More effective use of District resources, faster processing speed for contract POs leading to a reduction in lag time, increased efficiency in the Buyer's roles, as all staff will be able to perform and manage bids, increased efficiency in the Contract Administrator roles so both staff are doing like work so certain contract types are not bottlenecked waiting for one individual to process.

How does this goal align with your department mission statement, the College's Vision Plan 2035, Equity Plan, and/or Guided Pathways?

Goals will increase efficient and effective procurement and contract services

Expected goal completion date

6/30/2025

Goal 2

Description

Technology: Integrate more efficient legally-compliant technology into department processes. Specifically, DocuSign (contracts) and PaperCut (print services/Comet Copy)

How will you complete this goal? Include strategies and a timeline for implementation.

Obtain licensing for Docusign and implement licensing/set up for PaperCut. DocuSign is an easy set up (purchase of sufficient licenses) and PaperCut would have to have involvement from IS staff to set up.

Outcome(s) expected (qualitative/quantitative)

Increased legal compliance (Docusign), copy center process streamlining (PaperCut)

How does this goal align with your department mission statement, the College's Vision Plan 2035, Equity Plan, and/or Guided Pathways?

Goals will increase efficient and effective print and contract services

Expected goal completion date

2/28/2025

How do your goals align with the College's values of equity and inclusion?

Business Services supports students who are pursuing transfer readiness, general education, basic skills, career and technical training, aesthetic and cultural enrichment, and lifelong education. The Business Services team is committed to providing the necessary supplies and equipment within an environment that supports our students to achieve successful learning outcomes needed to contribute as citizens living in an interdependent and ever-changing world.

The Vision Plan 2035 includes the College's Educational Vision Plan. Review the goals and objectives in the plan and identify 1-3 objectives that your unit supports. Describe how your unit helps to support those objectives.

Goal 2; #4. Reimagine, improve, and implement uniform, streamlines, well-documented systems, and processes.

- Continually streamlining processes, communicating processes, and documenting processes to make them easy to follow

Goal 2; #5. Embrace a culture of improvement through innovation and creative problem-solving to support an inclusive, student-centered culture.

- Improving training efforts of the district to better support students and staff

Goal 5; #2. Invest in staffing and infrastructure to ensure students at all Palomar educational sites experience comprehensive and equitable support and services.

- Working on realigning staff duties to better serve the needs of the district and students.

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RESOURCES

Congratulations! You are nearing completion. In this section, you will consider the resources you need to implement your three-year program review plan and/or address any findings from your assessment of your discipline.

The section is organized into the following five parts:

PART 1: Staffing Needs (Faculty and Additional Staff)

PART 2: Budget Review

PART 3: Technology Needs

PART 4: Facilities Needs

PART 5: One Time Request for Other Needs (NonTechnology Equipment, Supplies, Operating Expenses, Travel)

Reflect upon the three year plan you created above, your current operations, and any upcoming factors (retirements, changes in legislation, and changes in policies or procedures) that will impact your unit. How will you allocate resources to implement your plan? Describe additional resources needed to improve the effectiveness of your unit/program. All resource requests must be aligned with the College's [Vision Plan 2035](#)

Summarize any reallocation/re-organization of resources you are making based upon your three-year plan, your current operations, and any other factors (e.g., legislation). Describe the impact of the reallocation of resources to your unit.

NOTE: All requests listed in the PRP will be reviewed by deans and supervisors, then forwarded to the appropriate review group for prioritization. A resource requests approved to move forward in the review process does NOT guarantee a position or funding.

PART 1: STAFFING NEEDS

This year, units are asked to identify new positions only as part of the PRP process. Vacant positions will be addressed outside of the PRP process.

If you are requesting STAFF, please fully complete this section. If not, you can skip to the next resource section. Click "+Add Staff, CAST, AA request" below for each additional request.

When considering the funds required for a position, consult the HR website for position salary schedule and the [Benefits Worksheet](#) for additional costs related to benefits for the position.

Are you requesting new Classified, CAST, or AA positions?

Yes

REQUEST FOR ADDITIONAL CLASSIFIED, CAST, AA

Staff, CAST, AA request 1

Title of position

Administrative Associate II

Is the position request for AA, CAST, or Classified staff?

Classified

Is this request for a full-time or part-time position?

Full Time

How does the position fill a critical need for current, future, or critical operations? (e.g. accreditation, health and safety, regulatory, legal mandates, institutional priorities, program trend analyses of growth/stability.)

The department has no administrative support, no one to enter reqs or assist with administrative duties. Rather than assisting just the Director, this position would assist the entire department.

Does the position assist in establishing more efficient District Operations through either of the following: reorganization/restructuring OR use of technology?

Yes

Is there funding that can help support the position outside of general funds?

No

Describe how this position helps implement or support your three-year PRP plan.

Without sufficient support, staff and students will not get the supplies, materials, and services they need.

Vision Plan 2035 Goals and Objectives

2:4

2:5

5:2

If the position is not moved forward for prioritization, how will you address this need?

Unknown.

Staff, CAST, AA request 2

Title of position

Warehouse and Mailroom Supervisor

Is the position request for AA, CAST, or Classified staff?

CAST

Is this request for a full-time or part-time position?

Full Time

How does the position fill a critical need for current, future, or critical operations? (e.g. accreditation, health and safety, regulatory, legal mandates, institutional priorities, program trend analyses of growth/stability.)

Currently, two of my areas with minimal staffing could be combined (the one-person mailroom and the two-person warehouse) with an on-site supervisor to support more efficient staffing and work flows.

Does the position assist in establishing more efficient District Operations through either of the following: reorganization/restructuring OR use of technology?

Reorganization

Is there funding that can help support the position outside of general funds?

Yes

What funding would support this position?

Former (retired) supervisor position - D Cummins

Describe how this position helps implement or support your three-year PRP plan.

Without sufficient support, staff and students will not get the supplies, materials, and services they need.

Vision Plan 2035 Goals and Objectives

2:4

2:5

5:2

If the position is not moved forward for prioritization, how will you address this need?

Unknown. The Purchasing Supervisor and Director of Business Services will continue to fill this role, although this is inefficient and cumbersome.

PART 2: BUDGET REVIEW

Review your Budget/Expenditure reports for 2021, 2022, 2023. Consider your three-year PRP plan.

Click on the link below to access directions to the *Available Budget Report* to complete this section.

[How to Request the Available Budget Report](#)

Reflecting on your three-year PRP plan, are there any budget considerations you would like your dean/supervisor to be aware of for the upcoming year?

Yes

What budget considerations would you like your dean/supervisor to be aware of or to consider? Please be as specific as possible. For example, if you need an increase in the 40000 account and a decrease in the 23000 account, describe what increase your department needs, how much, and a description of why the department needs the adjustment.

50000s - Legal services will need to continue in both the areas of general (contractual) legal and facilities-based (contractual) legal. These did come from institutional funds in the past, but may make sense to move to my area.

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PARTS 3, 4 and 5 – TECHNOLOGY, FACILITIES AND OTHER NEEDS

1. One-Time Fund Requests. Through the PRP process the college implements an approach for prioritizing and allocating one-time needs/requests. Prioritization takes place through the appropriate groups, leadership, and the Budget Committee. The executive team and Resource Allocation Committee consider various sources for funding PRP requests. Resource requests also inform the larger planning process like Scheduled Maintenance Plans, Staffing Plans, and institutional strategic planning.

For more information about funding sources available, see [IELM BLOCK GRANT, LOTTERY, PERKINS AND STRONG WORKFORCE GUIDELINES](#) (on the left menu of the webpage).

If you are a CTE program and think you may qualify for CTE funds for your PRP request(s), you are STRONGLY encouraged to answer the call for Perkins/Strong Workforce grant applications in February. Contact the Dean of CTEE for additional information.

Consider submitting one-time requests only if you have verified that you cannot fund the request using your general discretionary funds or other funds.

1. Technology and Facilities Review. Requests for technology and facilities are assessed by the Deans and then, if appropriate forwarded to the proper institutional group (e.g., technology review committee, or facilities) for review and feedback.

PART 3: TECHNOLOGY NEEDS

Will you be requesting any technology (hardware/software) this upcoming year?

Yes

Technology Request

Technology Request 1

What are you requesting?

DocuSign software/interface

Is this a request to replace technology or is it a request for new technology?

Replacement of Technology

Who is the current user of the requested replacement technology?

Contracts Administrators

Provide a detailed description of the request. Include in your response:

a. Description of the need? (e.g., SLO/SAO Assessment, PRP data analysis)

This need is to make our contract signing process legally compliant. Currently, AdobeSign is used and would not stand up in court. DocuSign is one of the few signing programs with an audit trail and the security to be legally compliant.

b. Who will be impacted by its implementation? (e.g., individual, groups, members of department)

Districtwide impact.

c. What are the expected outcomes or impacts of implementation?

Gain legal compliance with electronic signature to reduce risk for the District.

d. Timeline of implementation

Fall 2024

What is the anticipated cost for this request? If any, list ongoing costs for the technology (licences, support, maintenance, etc.).

\$20,000 to 25,000 (estimate). Cost is based on usage, but with only two staff using this this should be the maximum annual cost.

Do you already have a budget for this request?

No

What PRP plan goal/objective does this request align with?

#2

What Vision Plan 2035 Goal/Objective does this request align with?

2:4

2:5

If you have multiple requests for technology and had to prioritize, what number would give this? (1 = Highest)

1

What impacts will this request have on the facilities/institution (e.g., water/electrical/ADA compliance, changes to a facility)?

n/a

Will you accept partial funding?

Yes

Technology Request 2**What are you requesting?**

PaperCut program

Is this a request to replace technology or is it a request for new technology?

New Technology

Provide a detailed description of the request. Include in your response:**a. Description of the need? (e.g., SLO/SAO Assessment, PRP data analysis)**

PaperCut is a print management system that will reduce print output costs. This supports all of our current Konica Minolta devices and is a way to monitor and manage copying, faxing, scanning, and printing needs. This program would also be used for billing purposes (billing to departments) and greatly speed up this process on the staff's side. We can manage users via this system, develop reports, check print balances, and produce billing efficiently.

It currently takes staff several days to located and upload details from each and every printer across the district to then compile this information into the billing database, entering each printer count by hand per device. PaperCut can accomplish this task with a few button clicks - taking moments, rather than days. Wasted staff time that is regained by using this system will be able to be used for other duties.

b. Who will be impacted by its implementation? (e.g., individual, groups, members of department)

Districtwide impact, fiscal services, print services, students

c. What are the expected outcomes or impacts of implementation?

More efficient use of staff time, quicker reporting for bill backs sent to fiscal services to charge departments, ability of departments to monitor who is copying and quantities.

d. Timeline of implementation

Spring 2025, if not sooner.

What is the anticipated cost for this request? If any, list ongoing costs for the technology (licences, support, maintenance, etc.).

\$30,000

Do you already have a budget for this request?

No

What PRP plan goal/objective does this request align with?**What Vision Plan 2035 Goal/Objective does this request align with?**

2:4

2:5

5:2

If you have multiple requests for technology and had to prioritize, what number would give this? (1 = Highest)

2

What impacts will this request have on the facilities/institution (e.g., water/electrical/ADA compliance, changes to a facility)?

n/a

Will you accept partial funding?

Yes

PART 4: FACILITIES REQUESTS

Do you have resource needs that require physical space or modification to physical space?

No

PART 5: OTHER ONE-TIME NEEDS

For more information about funding sources available, see [IELM BLOCK GRANT, LOTTERY, PERKINS AND STRONG WORKFORCE GUIDELINES](#) (on the left menu of the web page under "Instructional Funding Sources").

Do you have one-time requests for other items (e.g., Non-Technology Equipment, Supplies, Operating Expenses, Travel) that your budget or other funding sources will NOT cover?

No

I confirm that the Program Review is complete and ready to be submitted.

Yes

Enter your email address to receive a copy of the PRP to keep for your records.

ajensen@palomar.edu

Reminder: Data does not autosave. Save this content before moving to the next section or closing form.

Page 5 will show for reviewers (VP and/or Planning Councils) upon submission of the form.

FEEDBACK AND FOLLOW-UP

Once your Program/Unit PRP is completed, your division or planning council should review and discuss based on your Vice President's planning process. This area is intended for summary feedback and recommendations from the divisional review.

Confirmation of Review by Immediate Supervisor.

Immediate supervisor who reviewed PRP:

Ann Jensen

Sign Date

4/17/2024

FEEDBACK

Strengths and successes of the program/unit as evidenced by the data, analysis, and assessments:

Areas of Concern, if any:

Recommendations for improvement:

Vice President (or President) Review

Strengths and successes of the discipline as evidenced by the data and analysis:

Areas of concern, if any:

Recommendations for improvement:

VP Name:

Signature Date: