

Entry #: 50 - Carole Meagher

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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 Fiscal Services

Program/Unit Name

---Fiscal Services

Name of Person responsible for the Program/Unit

Carole Meagher

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

Webpage URL 1

Unit webpage

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

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

Participant	Title
Carole Meagher	Sr Director, Fiscal Services
Sergio Almaraz	Business Systems Analyst
Patrice Nya	Manager, Accounting
Brandi Taveuveu	Manager, Budget and Payroll
Cassandra Nash-Stone	Manager, Student Accounts and Cashiering

## PROGRAM/UNIT MISSION STATEMENT

### What is your Program's/Unit's Mission Statement?

We are responsible for the fiscal management of District funds and serve as a hub for the collection, processing, and dissemination of financial and budgetary information on behalf of the College and its community.

Our team's mission is to promote the District's financial health, transparency, and operational efficiency in support of student success.

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

We provide stability in operations so that people can quickly and easily get whatever it is that students may need. All areas of the college rely on our ability to do our jobs well to serve our students most effectively.

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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

19.00

##### Number of Classified Staff

15.00

##### Number of CAST Staff

0.00

##### Number of Administrators

4.00

##### Number of Full-time Faculty

0.00

#### Part-Time Staff

##### Total Number of Permanent Part-time Staff

0.00

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

0.00

##### FTEF of Part-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)**

We rely on the support of:

Monteserrat (Montse) Pou-Facas, Short-term Hourly, Accounting  
Sofia Martinez, Short-term Hourly, Cashiering  
Sarai Vera, Short-term Hourly, Cashiering  
Jocelin Castellanos-Morales, FWS, Cashiering  
Ajitha Nuthulapati, Contractor, Payroll Business Systems Analyst

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

The new Senior Director started in March 2024, and the new Accounting Manager started in May 2023 which provide stability and leadership for the team.

We had an Accounting Technician retire and a new member of our team replaced her. Welcome!

Our department Administrative Specialist moved to Facilities and we are considering replacing her with a position that will be shared between Fiscal and Business Services.

One Business Systems Analyst left, ostensibly due to lack of clarity and flexibility around a remote work option and has been covered by a fill-in contractor who is 100% remote and works on the East Coast. While this contractor is capable, the lack of day-to-day contact makes collaboration and innovation difficult.

**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?**

Strengths - There is generally a clear division of responsibilities, and natural overlaps are handled collegially.

Opportunities - There are 3 Business Systems Analysts, who are siloed from one another as well as from their counterparts across the college. They don't officially coordinate with one another on a daily basis, nor do they officially back up one another's duties when one is out because they are not officially cross-trained. This makes it challenging when we are seeking to make system improvements as each BSA needs permission from a separate manager, for example, Payroll and Human Resources. And, it makes it hard for BSA's to move around and enjoy career development because there is limited opportunity to learn other parts of PeopleSoft.

**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.)?**

There has been discussion about moving BSAs to single group with a single manager who could provide mentorship, development, and get them working together more cohesively. Peoplesoft is a cohesive system so the people who support it shouldn't be siloed if we are to enjoy what it has to offer.

**Program/Unit Description**

**Who utilizes your services?**

Everyone who gets a paycheck, financial aid, or provides goods/services to the College and, by extension, our students relies on Fiscal Services to pay their bills and meet their personal or business financial goals.

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

The Accounting department is responsible for providing centralized recording, posting, analyzing, reconciling and reviewing components of the District's financial statements.

Accounts Payable is responsible for processing all non-payroll disbursements to vendors and individuals, including payments against purchase orders and contracts, travel reimbursements, staff reimbursements, and direct pays. Other responsibilities include Sales and Use Tax and Form 1099 reporting compliance.

Budget Office is responsible for formulating, managing, and monitoring the resources for Palomar Community College District. This office works closely with division leaders and department managers throughout the district to centrally coordinate budget development and to effectively support campus decision-making and effective management of district resources.

The Cashiers/Student Financials Office strives to provide quality service and information by maintaining accurate student financial records and communicating policies and information to students concerning their accounts. It is the function of the Cashiers/Student Financials Office to accept and process all payments and deposits made to Palomar College.

Payroll Services is responsible for processing payroll and required deductions including taxes and retirement withholdings. We strive to provide our employees with excellent customer service to meet their payroll needs.

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## PROGRAM/UNIT ASSESSMENT

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### 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.

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**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](mailto: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](mailto: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](#)

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?**

No

If **NO**, describe why and identify a date by which they will be entered.

SAOs were last entered in 2011 and no longer appear relevant.

**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**

2024.01 Fiscal transparency and savvy

**Assessment Status**

Not assessed

Management, faculty and staff will have the budget and actual financial information to understand their impact on the bottom line

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

Just started

**Next planned assesment**

Each quarter will assess progress on goals

**SAO 2****SAO Title**

2024.02 Fiscal speed and accuracy

**Assessment Status**

Not assessed

All revenues and expenses will be posted to the GL for visibility by budget managers within the same fiscal month.

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

Just started

**Next planned assesment**

Each quarter will assess progress on goals

**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**

Payroll Journal errors

**Description of Measure**

Commitment Accounting throws errors which delays processing of payroll. Would like to baseline # and \$ amount of errors, and causes of errors, then coordinate with HR to reduce these. Goal is zero.

Year	Year	Year	Year
2024	2024	2024	
Value	Value	Value	Value
#	\$	causes	

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.

**Qualitative Data**

Describe any qualitative measures you use and summarize the results.

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

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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!**

Accounting and Reporting - Delivered a smooth year-end and a clean audit with zero findings related to fiscal services.

Accounts Payable - The college has moved to creating vouchers up front, rather than waiting until after approval which streamlines payment and improves accuracy.

Budget Office - Started to implement Commitment Accounting in PeopleSoft in order to track budgets versus actuals. The team also launched a new budgeting process for non-payroll items to improve engagement and accuracy.

Cashiering/Student Financial Services - Transferred to Nelnet to save money and improve student services. We are also transitioning to ACH instead of paper checks for student financial aid.

Payroll - During the pandemic, launched an Adobe Sign process for leave and absence tracking,

**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?**

N/A

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

There is a district-wide effort to get all Board Policies and Administrative Policies back on a regular review cycle, and Fiscal Services is cooperating with this effort. We will also bring any updates and recommendations from the Budget Committee into the process.

One policy we are evaluating is for travel to go to a per diem instead of actuals (with receipts) for meals. This will save a lot of time and speed up employee reimbursements.

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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:**

A team of highly capable people who have worked for the District for a long time, and know the systems and their jobs well.

**Opportunities:**

Palomar is on the latest version of PeopleSoft, still, we haven't done any patch updates in Finance.

**Aspirations:**

There are many opportunities to leverage PeopleSoft in making our processes more efficient and effective:

- > Budget versus Actuals reporting (leveraging PeopleSoft capabilities plus improving coordination with Human Resources)
- > ACH payments to vendors for AP reduce check writing and printing (expanding Cashiering software)
- > Electronic vendor invoice vouchering (new software interfacing with PeopleSoft)
- > Three-way matching (PeopleSoft)
- > Time and leave tracking (PeopleSoft)
- > Travel expense reimbursements (PeopleSoft)

**Results:**

The goal is to have staff focused less on data entry and more on continuous process improvements across the District as we cross boundaries. We are interdependent with processes elsewhere and need to lead the charge in recognizing how we impact one another.

In addition, to build a culture of fiscal understanding and transparency, staff need to have time to be active in participatory governance so they can build relationships across the campus, build informal relationships, and be tasked with regularly presenting to their own constituent groups about areas of concern with regard to District financial performance.

Finally, we should have time to provide regular workshops such as PeopleSoft training, updates regarding changing rules and regulations that might affect financial planning, and any other information of interest to our constituent groups.

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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**

These seem to be out of date? Will check with team.

**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.**

## 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

Building a culture of fiscal understanding and transparency across the District.

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

Make solid progress on Service Area Outcomes.

### Outcome(s) expected (qualitative/quantitative)

Qualitatively, people will have awareness and sensitivity about financial decisions. Questions will be more sophisticated and less about distrust.

Quantitatively, we expect a stronger district financially. Lots of small, good, decisions will add up to a stronger bottom line. As we like to say, we don't have one \$10 million problem - we have 10 million \$1 problems.

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

II.4. Reimagine, improve, and implement uniform, streamlined, well-documented systems, and processes.

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

III. Optimize enrollment for fiscal stability and growth

III.8. Maintain fiscal stability and increase external funding to support student enrollment, success, and the district's fiscal health.

A well-managed District ensures our students can seamlessly access the instruction and services they expect, without budget cuts or other disruptions forcing them to change their plans.

### Expected goal completion date

6/30/2025

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

When we do things poorly, the impact is greatest on vulnerable members of our community.

### 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.

1.8. Develop schedules that facilitate completion and are data-informed, offering classes when, where, and how students need them. \*Ensure to make sure we can afford to offer a student-centered schedule.\*

2.4. Reimagine, improve, and implement uniform, streamlined, well-documented systems, and processes. \*Make it easy to get what you need to get your job done.\*

3.8. Maintain fiscal stability and increase external funding to support student enrollment, success, and the district's fiscal health. \*Ensure all stakeholders are aware of how we are using funds\*

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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

Sr Accounting Technician - Student Accounts /Cashiering

##### 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.)**

There used to be three Sr Accounting Techs, and now there are only two. The front desk is covered by student workers and STH who need regular training and coaching by the Sr Accounting Techs. Relying on only two Sr Accounting Techs plus a Manager means compliance/separation of duties can be compromised; and the workload means delays in processing and responding to student needs. Implementing student ACH for financial aid was a heavy lift, but this experience can now be shared with Accounts Payable if the Cashiering team has time to cross-train and coach them,

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

Provides opportunities for staff in participatory governance with Student Services to identify opportunities to improve service, or educate campus community on how to work more effectively with cashiering.

**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.**

Make progress on the goal of improved cross-college cooperation with Student Services, and help implement technology improvements that will increase speed and accuracy.

**Vision Plan 2035 Goals and Objectives**

2:4

2:5

3:4

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

We could consider increasing both the number and training level of student workers and STH employees.

**Staff, CAST, AA request 2**

**Title of position**

Budget Technician

**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.)**

With the integration of HCM and Finance in Peoplesoft in areas such as Commitment Accounting and Position Control, there has been a combination of additional workload to the department as well as concerns about separation of duties with a single accountant setting up budget tables, posting the payroll GLs, and managing the day-to-day accounting in categorical funds.

This Budget technician would work to ensure budgets and HR feeds were accurate, as well as support the additional reporting and analysis required to provide visibility and transparency into Palomar's financial condition.

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

Takes full advantage of the capabilities of PeopleSoft by spanning the boundaries between HR, Payroll, and Budget.

**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.**

Improves cross-boundary coordination.

**Vision Plan 2035 Goals and Objectives**

2:4

2:5

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

The current state is that our business processes do not support the automated analysis in Commitment Accounting, the campus community complains that budgets and finances are opaque, and that transactions are processed too slowly to provide meaningful status updates.

So, we could continue this way if the District believes there are more pressing priorities.

## 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?**

No

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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 CTE 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?

PeopleSoft Time and Leave Managment

##### 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)

Currently, process is done through Adobe Sign and forms are manually input into the payroll system by payroll technicians. There is no automatic error-checking, so errors must be corrected at the journal entry level.

Implementing through Peoplesoft

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

3 payroll technicians and 2 accountants currently spend approximately 350-500 hours per month supporting the manual process and correcting back-end errors. Further, information on payroll can be kept in PeopleSoft rather than Adobe Sign plus mysterious pay codes, thus reducing confusion and grievances.

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

At least 300 hours per month, or 3,600 hours per year which equals 1.8 headcount can be saved. These hours can be spent working on process improvements and providing employee service for more complex issues.

Most important, allowing payroll staff time to build visibility in participatory governance means that when employees have complaints about their pay (1) complainants can better understand how they can provide better input to the payroll process; (2) staff can train complainants in employee self-service.

###### d. Timeline of implementation

FY24-25 for launch FY 25-26.

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

License \$300K - One-time

Implementation \$300K - One-time

Maintenance

##### 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

2:6

**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?**

Softdocs for workforce automation - AP Vouchering, Travel Pay Requests and Time and Leave reporting

**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)**

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

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

**d. Timeline of implementation**

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

TBD - currently researching

**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

**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)?**

**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.**

cmeagher@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:

Sign Date

## 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: