

 Dept FCO - (Fin) Budget and Personnel > Administrative Unit > Program Review

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**AUO 1.A. Department/Division Name:** Budget and Personnel

**AUO 1.B. Name(s) of the author(s) of this report::** Martin Varela

**AUO 1.C. What is the primary focus of your department/division?:** Budget analysis, development, monitoring and reporting. Process budget documents. Process HR and payroll documents.

**AUO 1.D. How many customers are served annually and is number trending up, even, or down?:** Department provides services to the whole campus.

**AUO 1.E. Who are the typical customers served by this department/division? :**  
Faculty, Staff, Administrators, District HR, District Business Services.

**AUO 2.A. What is the department/division Mission Statement?:** The mission of the De Anza College Budget and Personnel Department is to provide high quality financial and personnel services to faculty, staff, administrators and students. The services provided by the Budget and Personnel Department promotes student success both directly and indirectly. The Department maintains strong relations with faculty, staff, and administrators in the communication and maintenance of timely, accurate and detailed financial and personnel information and records.

**AUO 2.B. Ways and to what extent do your services support your Mission statement:**

**AUO 3.A. Number of classified employees:** 3

**AUO 3.B. Number of management employees:** 1

**AUO 3.C. Number of student employees:** 0

**AUO 3.D. Position(s) Needed:** Temporary employee

**AUO 3.E. Justification for Position(s)::**

**AUO 3.F. If additional position/s were hired did it result in the expected improvement? How so? :** Martin: Cynthia hired a TEA last year

**AUO 4.A. Have there been any facility changes in the last five years?:** No

**AUO 4.B. Are there any significant facility changes that will be needed over the next five years?:**

**AUO 4.C. Give justification for facility requests :**

**AUO 4.D. If additional facility changes occurred, did it result in the expected improvement? How so?:**

**AUO 5.A. Have there been any equipment purchases in the last five-years. If so what was purchased?:** Desktop Scanners, backup hard drives for all employees



**AUO 5.B. Are there any equipment purchases that will be needed over the next five years?:** 4 Workstations (\$1,500 x 4=\$6,000) plus extra monitor per station 4 x \$250=\$1,000 and 2 laptops (1 Mac \$1,300 and 1 PC \$1,700) that can be used by department staff for meetings and conferences. Total cost is approximately \$10,000.

**AUO 5.C. Justification for equipment(s)::**

**AUO 5.D. If additional equipment was purchased, did it result in the expected improvement? How so?:**

**AUO 6.A. Amount of Department/Division discretionary (B) budget or explain.:**  
19,000

**AUO 6.B. Does the department/division need additional discretionary funding? If so, why?:** Need budget for reclassifications, conference and travel, supplies, and special projects (ie-BDMS hired TEA to help process past personnel documentation).

**AUO 6.C. Additional discretionary budget requests:** additional \$16,000 for a total of \$35,000.

**AUO 6.D. Justification for additional discretionary budget:** Hire TEA to help process past personnel documentation into BDMS

**AUO 6.E. If additional discretionary budget was allocated, did it result in the expected improvement:**

**AUO 7.A. Have there been any significant organizational alignment changes over the last five years?:**

**AUO 7.B. List any significant organizational alignment changes needed over the next five years.:**

**AUO 7.C. Justification for significant organizational alignment changes:**

**AUO 7.D. If organizational alignment changes were made did it result in the expected improvement?:**

**AUO 8.A Have there been any significant changes in regulations/laws/policies over last five years?:** Payroll: Affordable Care Act lead to change in how additional pay is processed for parttime faculty to track hours.

HR shifted workload to campuses by changing to an electronic hiring system called Taleo. Temporary hires were handled at HR but are now require review and approvals in Taleo. ETS activated Banner Document Management System (BDMS) module within Banner so documents need to be scanned and uploaded into the system.

State Programs need additional financial support-SSSP, Student Equity, EOPS& CARE and DSP&S. Require ongoing monitoring and major support for year-end reporting.

District adopted the California uniform public construction cost accounting act (UPCCAA) program.

District adopted the SB -854 public works senate bill which required vendors to be registered with the Department of Industrial Relations (DIR) and pay workers the prevailing wage.

**AUO 8.B. List changes in regulations/laws/policies affecting department/division over next five yrs.:** HR require additional supporting documentation (pre-hire sheet) for

Independent contracts to assist with determining if vendor should be an employee or an independent contractor.



**AUO 8.C. List any additional resources needed to meet the new regulations/laws /policies.:**



**AUO 8.D. Justification for additional resources:**



**AUO 8.E. If additional resources were made provided did it result in the expected improvement?:**



**AUO 9.A. List any significant professional development activities over the last five years.:**



**AUO 9.B. List any significant professional development needs over the next five years.:**



**AUO 9.C. Justification for significant professional development .:**



**AUO 9.D. If additional professional development was provided did it result in expected improvement?:**



**AUO 10. List other Needed Resources & Justification:**

**AUO 11.A. What are the current/active department/division outcome statements?:**

Budget\_AUO\_1 - Financial managers need to be able to review and manage their own budgets.

Payroll\_AUO\_4 - All faculty will know how to find their CWID and understand the importance of including it on all payroll forms.

**AUO 11.B. How many AUO statements have been assessed since the last program review?: 2**

**AUO 11.C. Summarize the outcomes assessment findings and resulting department/division enhancements.:**

Budget\_AUO\_1 Target : Target Met. In coordination with ETS reports have been developed so that the financial managers have access to the information. The number of inquiries has been reduced by 80-90%(03/10 /2016) Reflection: The creation of the reports and training provided all including those new to the system has led to this result of only the occasional inquiry. Training is provided by the Director of Budget and Personnel. Enhancement: Target Met. Continue to work with managers and ETS to improve reporting, as needed. (12/09/2016)

Payroll\_AUO\_4 Target : Target Met 85% of the faculty know their CWID. (05/26/2011) Reflection (CLICK ON ? FOR INSTRUCTIONS): The results were satisfactory but could use improvement. Enhancement: Target met. Continue to explain importance of the CWID to new faculty when on-boarding. (05/10/2017)

**AUO 11.D. What are the department/division outcome assessment plans for the next five years?:** The division are currently meeting to discuss various suggestions.