

Administration Unit

1. What are the main objectives of your unit, and how do you measure success in achieving them?

The department's primary function is to provide strategic leadership and direction to promote the mission, vision, and objectives of the College within the operational and financial efforts of the College.

The division sets annual goals aligned with the strategic plan. Current projects are discussed and reviewed at the weekly Operations and Finance Leadership Team (LOFT) meeting.

Managers within the division set annual goals as part of the performance evaluation process, with an evaluation each spring.

2. What services or activities in your unit are mandated, and what is the estimated time to perform these services or activities?

Administration Mandated Activities			
Services/Activities	Examples	Type of Mandate	Estimated Hours
Public Records Requests	Respond to requests and provide information	Oregon Revised Statutes/ Northwest Commission on Colleges & Universities	Varies with request
Budget Officer	Preparation of the budget and submission of the budget to the District's Budget Committee; BAT meetings, BAT Forums, Budget projections	Oregon Local Budgeting manual	10 hours a week
Investment Manager	Investment functions of the College	ORS	1 hour a month

3. What are the services that your unit provides and to which customers (students, faculty, staff, donors, others)?

- Customers
 - Students: Field incoming phone calls and emails regarding issues and inquiries related to payment, collections, late fees/penalties. Schedule meetings and training with Associated Student Government (ASG) regarding tuition and fee changes, budget, and bookstore issues. Coordinate and lead Budget Advisory Team Forums with attendance open to all students.
 - Faculty and staff: Coordinate LOFT, BAT, BAT Forums, divisional meetings, facilities committee, and RVC ad Hoc, producing agendas and meeting minutes. Schedule weekly,

monthly, and quarterly 1:1 meetings with LOFT, other staff, and other recurring meetings. Field incoming inquiries, schedule meetings and presentations.

- Board of Education: Coordinate facilities committee, producing the agendas and meeting minutes. Prepare and present financials, budget information, projections, and other materials at board meetings, finance and audit committee meetings, finance committee, bond oversight committee, and board work sessions.
- Community: Field incoming inquiries from Higher Education Coordinating Committee (HECC), other community colleges, vendors, local partners, and federal, state, and local grant agencies.
- Public Records Requests: Respond to all public records requests, including coordinating with the responsible area to obtain correct documents to fulfill the request.
- Assistant to VP
 - Performs a variety of executive-level administrative duties in support of the division, such as scheduling meetings, arranging appointments, coordinating catering, taking minutes, and assisting with special projects. As well as strategically directing the flow of verbal and written information to O&F staff.
 - Prepare, publish, and disseminate written communication, including monthly LOFT, E-Team report, and grants report.
 - Develop, coordinate, implement, and submit the O&F division annual department goals and assessments.
 - Respond to public record requests submitted to the College, and ensure the process is publicly posted and current with the state laws.
 - Coordinate, review, edit and submit distribution-ready board policy and administrative procedures to the Policy and procedure meetings.
 - Coordinates BAT and BAT forum meetings and produces minutes.
 - Coordinates, help develop, and maintain the O&F webpages
- VP
 - Provides strategic leadership and direction to promote the mission, vision, and objectives of the College within the operational and financial efforts of the College.
 - Leads the effective operations of the O&F division within the context of the college mission, core values, and wildly important goals.
 - Works with the college president and executive leadership to ensure the O&F division supports and enhances the larger college mission and champions the operational and financial vision.
 - Identify, prioritize, and execute projects, operations, and goals to improve the division; transform, strengthen, and inspire student experiences while remaining within the College's financial and systemic capabilities.
 - Identify, research, and capitalize on internal and external funding sources to support the needs of the College. Participate in developing internal and external funding requests (i.e., writing and/or editing of a proposal, development of the budget, etc.).
 - Utilize program review process to support and prioritize department and program needs; collaborate with directors to establish appropriate staffing, materials, and equipment levels and advocate for the best use of divisional budget and resources.

- Serves as the Deputy Clerk of the Board of Education; Serves as the College's investment manager and is designated as the primary representative to sign warrants; monitors banking activities of the College, ensuring adequate cash flow to meet the organization's needs. Along with the College President, serves as the College representative who can enter into contractual obligations for the College.
 - Responsible for developing, preparing, coordinating, presenting, and managing the college-wide budget of over \$150 million. Directs and oversees the development of the college-wide budget, substantiating it is in alignment with the College's strategic plan; Evaluates and advises on the financial impact of short- and long-range planning.
 - Oversees and develops financial projections.
 - Responsible for recognizing and understanding the impacts of external forces on the College's three primary revenue sources; tuition & fee revenue, local property taxes, and state support.
 - Coordinates the preparation of financial statements, financial reports, and special reports to meet federal, state, and local regulations.
 - Conduct presentations and other responses to requests for information from internal and external stakeholders, state and federal agencies and organizations, and the media.
 - Represent the operations and finance division and the College at the local, state, and national levels.
4. List each position in your unit, and briefly describe the responsibilities of each. Include part-time and work-study student hours.

Assistant to the Vice President of Operations & Finance/CFO -

Participates in the activities and operations of the Operations & Finance division as an executive-level confidential assistant to the Vice President of Operations & Finance by delivering a wide range of complex administrative services. Provides administrative support to division officers, directors, and managers when needed. Provide administrative support to other division officers, directors, and managers as required, coordinate meetings, arrange appointments and coordinate catering, take meeting notes, and assist with special projects.

Vice President of Operations and Finance/CFO

The Vice President of Operations and Finance primary duties are to provide strategic leadership and direction to promote the mission, vision, and objectives of the College within the operational and financial efforts of the College. The VPOF has supervisory oversight in the areas of financial planning, analysis, and budgeting; accounting, financial controls, institutional research, and reporting; treasury functions; campus development; space planning, design, and construction; facilities operations and services; purchasing and contracts; administrative systems management and IT; financial modeling of the new projects and programs for the College; development and implementation of budget guidelines, processes and policies; oversight of capital improvement projects and space utilization; parking; facilities operations and events coordination, as well as final hiring, evaluation, workload, and budget authority for the division. The VPOF serves as the Deputy

Clerk, Budget Officer, and Investment Manager. In addition, the VPOF is the primary signer for warrants and contractual obligations.

4. Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the College's mission?

Not at this time.

5. How could the College help your unit do its job better?

Take an active role in communicating and understanding the policies, procedures, and handbooks related to O&F.

6. In what ways does your unit relate to other units of the College, academic and nonacademic? For example, what services do you provide to other units? What services do other units provide you? On what tasks do you collaborate with other offices?

The unit is here to support the O&F division and other divisions within the College.

- a. Facilitate and provide oversight to the college-wide budget process, including forums and budget advisory meetings.
 - b. Facilitate and provide oversight to ERP project.
 - c. Facilitate O&F leadership team meetings.
 - d. Facilitate BOE subcommittees (facilities committee, finance and audit, and budget committee)
 - e. Represent RCC at the state business officers meeting, Downtown Medford association meetings, CCSF formula committee, and other local and state meetings as assigned.
 - f. Facilitate and provide oversight for construction, remodel, sale, purchase, lease of real assets (property), including financing arrangements
 - g. Provide guidance and oversight in the finances of the College
 - h. Primary signer for checks and contracts
 - i. Approves wires
 - j. Negotiate contracts and sales agreements
 - k. Facilitate and respond to public records requests
 - l. Respond to media requests when necessary.
7. What skillsets and resources does your unit possess that can be shared with other units at slack times?
 - a. Prepare, publish, disseminate written communication, compose correspondence, memos, charts, agendas, and minutes.
 - b. Facilitate and/or present at meetings
 - c. Represent RCC at state and local meetings
 8. Which individuals in your unit are cross-trained, and in what areas?
 - a. VP can step into most positions in the business office, budget office, and contract and procurement office.
 9. What resources do you need to improve your services to a superior level?

- a. Automatic notifications for tasks, i.e., authorizations for purchase orders; This would improve response time.
- b. Time to attend training on topics affecting community colleges
- c. More workdays during the year

10. What technologies are available to you to provide your services better? What training do you need to be more effective users of technology?

- a. RCC already has a dizzying selection of software to use (the website, RogueNet, Zoom phone, ADP, 25Live, MPulse, NEOED, etc.). Additional training (tips and tricks) would be helpful for any/all of them.
- b. A new ERP
- c. A series of onboarding training courses for software used at the College
- d. A series of required ongoing training courses for current employees when software updates or changes.

11. What one thing do you wish you could do differently to improve your effectiveness but have not had the opportunity, time, or resources to do?

- a. Bi-weekly/monthly brainstorming sessions/admin meetings with the other admins. Admins who have been at RCC longer have such a wealth of knowledge of resources; newer admins have no idea what's even available.

12. How do you review and evaluate your department's yearly performance?

- a. Yearly assessments of goals
- b. Individual assessments
- c. Weekly meetings to address current tasks
- d. Feedback from committee members

13. What support will your unit need to provide during the ERP implementation?

- a. A consultant to support the project and leads/SME's
- b. Allow employees assigned to the project release time and/or extra pay. Do not overload employees to the point of breaking. Don't repeat past mistakes!
- c. Support from everyone at the College for the ERP selected and a commitment to make changes to processes

The following are the activities we will perform during the implementation:

- a. Facilitate communication of the ERP process and developments to AllofRCC
- b. Scheduling support between GFOA consulting and RCC stakeholders
- c. Attending meetings to take notes
- d. Facilitate and lead the project

14. Explain how your unit could function with

- a. A 10 percent reduction in staff time (4 hours/week = ½ day per person)
 - a) Admin – Slower response to emails, authorization approvals, and updating VP's calendar.

- b) VP – Work would continue without compensation – unable to take vacations working full time.
- b. A 20 percent reduction in staff time (8 hours/week = 1 day)
 - a) Admin – Slower response to emails, authorization approvals, updating VP's calendar, and a slower return on minutes.
 - b) VP – Work would continue without compensation – unable to take vacations working full time.
- c. A 30 percent reduction in staff time (12 hours/week = 1½ days)
 - a) Admin – Slower response to emails, authorization approvals, updating VP's calendar, and a slower return on minutes.
 - b) VP – Work would continue without compensation – unable to take vacations working full time.
- d. A 10 percent reduction in non-personnel resources
 - a) This reduction would be fine as long as we limit travel and inflation is not staggering. Four individuals are utilizing this budget. Before 2021/22, there were only two.
- e. A 20 percent reduction in non-personnel resources
 - a) This reduction would reduce the number of training opportunities available to the team and extend the replacement schedule of computer equipment.
- f. A 30 percent reduction in non-personnel resources
 - a) This reduction would hinder the team's ability to keep up with critical changes in the industry by severely limiting training opportunities and extending the replacement schedule of computer equipment.

What would be the consequences of other effects on service delivery in each case?

Budget and Cash Management

1. What are the main objectives of your unit, and how do you measure success in achieving them?

Main objectives:

- *Serves as an advisor to the Vice President of Finance and Operations/CFO and assures the integrity of the budget, treasury management, the account structure and posting of payroll information to the general ledger;*
- *supports the VP of Finance and Operations/ CFO in organizing the budget process;*
- *establishes budgetary and reporting structure procedures;*
- *assists with all phases of budgeting, including projections, final reports, assures compliance with federal, state, and local laws in relation to budgeting*

Measurement:

- *Adopted budget by 6/30 each year;*
- *Monitor cash flows, maintaining maximum/minimum balances as established internally by process and externally by banking institutions;*
- *Annual CCFIS reporting process confirms proper maintenance of account structure*
- *Annual audit confirms proper budget law was followed appropriately, the posting of payroll information is accurate, and treasury management is sufficient*

2. What services or activities in your unit are mandated and what is the estimated time to perform these services or activities?

Budget and Cash Management Mandated Activities			
Services/Activities	Examples	Type of Mandate	Estimated Hours
Budget	Proposed, Approved and Adopted phases; adopted by 6/30 annually; annual audit work; quarterly budget transfers; budgets for grant applications	Oregon Local Budget Law and Budget Preparation BP-6200, and AP-6200; Budget Management BP-6250 and AP-6250; Financial Audits BP-6400 and AP-6400; Grant application requirements	Budget process is done over the course of the fiscal year - constitutes at least 50% of position; Budget quarterly transfers and audit work is done throughout and after end of budget year ~60 hours/fiscal year; Grant application budgets vary by complexity and quantity of applications – an individual grant can take anywhere from 30 minutes to several hours
Cash Management	LGIP has a maximum balance; US Bank balance maintained to support day-to-day activity	Financial Audits BP-6400 and AP-6400; minimum and maximum balances established by banking institutions; Investments BP-6320	~250 hours/fiscal year
Payroll Posting	Post monthly payroll to GL; annual payroll accruals and audit schedules	Financial Audits BP-6400 and AP-6400	Process takes 2 hours + each month; audit work for accruals ~40 hours/fiscal year

Account Structure and maintenance	Maintain and update account segments; add new accounts; review all accounts for correctness	Required for Oregon CCFIS annual reporting; Accounting AP-6310	~250 hours/fiscal year
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3. What are the services that your unit provides and to which customers (students, faculty, staff, donors, others)?

Other Services Provided		
Service	Provided To	Estimated Hours
Budget operations and forums	College administrators; staff, faculty, students; Board of Education; District Budget Committee	~984 hours/fiscal year
Grant application budgets	College administrators, staff, faculty	~40 hours/fiscal year
Annual audit work	Auditors; Business Office staff	~100 hours/fiscal year
Account Structure and maintenance	Auditors; College administrators, staff, faculty	~250 hours/fiscal year

4. List each position in your unit, and briefly describe the responsibilities of each. Include part-time and work-study student hours.

Budget Coordinator – all responsibilities as this is only position in unit

5. Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the College's mission?
- 3-5 year capital project, deferred maintenance, computer and equipment purchase/replacement plan – need to purchase or develop a method for the process and track the activity; a properly developed plan will provide more accurate information for budget planning, pursuit of grants or other funding, improve the quality of College programs thus better outcomes for student learning and economic development for the College community*
 - Improved 5-10 year budget projections – need automation for calculations and scenarios by using better software*
 - Interactive annual budget preparation – need automation for allowing input from College stakeholders; eliminate the manual processes, work arounds and inconsistencies resulting from them; allow for better participation from the College community*
6. How could the College help your unit do its job better?
- Continue to pursue software methods to improve projections and a capital plan; allow for training opportunities for continual job knowledge advancement; increase College community participation in budget process and input; eliminate the ability to go around the processes put in place to meet requirements; establish automation and integration between College systems for Budget and the payroll software (currently ADP)*
7. In what ways does your unit relate to other units of the College, academic and nonacademic? For example, what services do you provide to other units? What services do other units provide to you? On what tasks do you collaborate with other offices?
- The budget unit impacts the entire College as the annual adopted budget enables the College to continue its operations.*
- The budget unit monitors and maintains requirements for budget law and makes recommendations for the proper way to establish a change or new activity.*

Information Technology provides technical and programmatic assistance; many departments and divisions provide input for preparing projections including personnel, benefits and district. President's Office helps coordinate budget meetings with the RCC Budget Committee and Board of Education. Institutional Research provides responses to data requests allowing communication with the College community and data informed decisions.

The budget unit collaborates heavily with procurement, grants, facilities, business office during the budget planning and projecting process. Throughout an active budget year collaboration with almost any area of the College is likely for planning or just day to day maintenance to be able to conduct regular business activities.

8. What skillsets and resources does your unit possess that can be shared with other units at slack times?

Knowledge of: Organization, composition, and administration principles of an adult learning establishment; generally accepted accounting principles; fund accounting; Oregon Local Budget Law; federal grants management; government auditing standards; Oregon Administrative Rules; OMB Circulars A-133 and A-2; in depth knowledge of Accounts Payable, Accounts Receivable, and, and Collections; adept with Microsoft office products, 10-key calculators, and ADP; College policies and procedures; applicable legal requirements, policies, and procedures.

Skills: Accounting and financial practices; organizational and supervisory skills; project management skills; decisiveness; strong verbal and written communication skills; listening skills; effective conflict-resolution and problem-solving skills; planning and organizational skills; computer skills, preferably in Microsoft Office Suite® products; and math skills.

Ability to: Understand, apply, and demonstrate the College's core leadership competencies. Perform detailed work involving written and numerical data; make arithmetical calculations rapidly and accurately; analyze data, think creatively, make decisions, and prioritize; manage multiple projects effectively and efficiently; proactively problem solve; plan, supervise, train, and develop staff; collaborate and communicate effectively and respectfully with staff, management team, client colleges, faculty, and the public; work effectively and collaboratively as a member of various management teams, councils, and committees; cope effectively with conflict; operate a 10-key calculator, computer, and other office equipment. Which individuals in your unit are cross-trained, and in what areas?

Cross trained in many areas of the Business Office like AP, bank recon, audit, month end close, monthly financials, grant accounting, reporting, etc.; working knowledge of areas of Payroll

9. What resources do you need to improve your services to a superior level?

The right software could be a game changer in the types of work that could then be accomplished; stop doing the busy and manual work in exchange for higher level forecasting and projecting; Institutional Research support; assistance maintaining College policies, procedures and processes

10. What technologies are available to you to provide your services better? What training do you need to be more effective users of the technology?

Utilizing RogueNet and Excel; could use higher level training in Excel for forecasting (might be free online training); also need to improve knowledge and use of SmartSheet, DocuSign, Power BI

11. What one thing do you wish you could do differently to improve your effectiveness but have not had the opportunity, time, or resources to do?

Establish a budget process using workflows and systems; remove the manual manipulation of data which is prone to errors; integrate ADP with a budget projection

12. How do you review and evaluate your department's yearly performance?

Since it is just one position much of this can be accomplished with the annual performance evaluation; implementing a program review type process

13. What support will your unit need to provide during the ERP implementation?

TIME – will need to assist with development and implementation of account structure and budget processes while continuing to do day to day work and functions; also need ability to forego doing some things such as roll the district budget in the conversion year versus doing a full district analysis

14. Explain how your unit could function with: As a single position, any reduction will directly impact the quality and quantity of work that can be done.

a. A 10 percent reduction in staff

Would reduce the ability to provide grant budget application assistance and possibly reduce some of the services provided to the College community during the budget process such as additional detail regarding personnel or reduce the number of times projections are updated during the budget cycle; would hinder the ability to learn and implement new software for improvements.

b. A 20 percent reduction in staff

Would eliminate the ability to provide grant budget application assistance; reduce the services provided to the College community during the budget process such as additional detail regarding personnel or reduce the number of times projections are updated during the budget cycle; treasury management would be performed at a minimum level to get by; minimal development of account structure or process improvements; would severely hinder the ability to learn and implement new software for improvements.

c. A 30 percent reduction in staff

Would only allow time for work on budget at a requirement level – no additional services for College community; treasury management would be performed at a minimum level to get by; no additional development of account structure or process improvements; would eliminate the ability to learn and implement new software for improvements

What would be the consequences of other effects on service delivery in each case below?

d. A 10 percent reduction in non-personnel resources

Reductions would impact the purchase/use of software and funds available for training opportunities; could also impact availability of upgrades for computers and peripherals. These could impact ability to serve the College community effectively and efficiently.

e. A 20 percent reduction in non-personnel resources

Reductions would limit the purchase/use of software and funds available for training opportunities; could also limit availability of upgrades for computers and peripherals. These could impact ability to serve the College community effectively and efficiently.

f. A 30 percent reduction in non-personnel resources

Reductions would severely limit the purchase/use of software and funds available for training opportunities; could also severely limit availability of upgrades for computers and peripherals. These could impact ability to serve the College community effectively and efficiently.

Business Office

1. What are the main objectives of your unit, and how do you measure success in achieving them?

The main objective of the Business Office is to provide sound, timely and accurate financial information and services to the College. It is measured through the quality and accuracy of the deliverables our office produces, meeting deadlines, and being proactive with our business initiatives. The Business Office prepares both mandated and analytical reporting to various internal and external constituents. Services such as payment collection and payables are measured by timely production, response time and level of customer service internally, to students, and other external parties.

2. What services or activities in your unit are mandated and what is the estimated time to perform these services or activities?

Mandated Activities - Business Office			
Services/Activities	Examples	Type of Mandate	Estimated Staff FTE
Federal Reporting	Annual Comprehensive Financial Report (ACFR) + Annual Audit oversight; IPEDS (financial portion); 1099-NEC/MISC; 1098-T; Grant reporting/draws; Equity in Athletics Disclosure Act (EADA) Survey	Legally required	1.8 FTE
State/Local Reporting	Grant reporting; Community College Financial Information Systems (CCFIS) Reporting	State statutes; Grant mandated	1.15 FTE
Organizational Financial Reporting	Monthly financial statements to Board; Other financial reporting & analysis to senior and executive management; Account Analyses; Accounting reports to SOU; Respond to inquiries from internal departments and other	College fiduciary accountability & management	1.2 FTE
Accounts Payable	Vendor payables; Corporate card management; Travel/Professional Growth PO processing;	College financial operational management	0.9 FTE
Accounts Receivable	Posting Student & Agency payments; Financial Aid Refunds; Collections; Respond to inquiries from students, agencies, internal departments;	College financial operational management; Refunds are federally mandated	2.25 FTE
Other business operational activities	Fund review; Student support services accounting and oversight (gift cards, tuition waivers, athletic dept per diems)	College financial operational management	0.5 FTE
Total Estimated Staff FTE*			7.8

** does not include Director's supervision, strategy and planning time; reflects actual work time for each service category*

3. What are the services that your unit provides and to which customers (students, faculty, staff, donors, others)?

See 1 & 2 for services. The Office provides service to primarily students, government agencies, faculty/faculty administration, student affairs, senior and executive management, the Board of Education, college employees and other external organizations. Below are the current sub-programs of the department.

Sub-Program Areas - Business Office		
Sub-Program	Staff*	Customers Served
Accounting / Financial Reporting Audit Financial statements prep/review Grant accounting Financial systems/analysis	Director (1) Senior Accountant II (3) Accounting Specialist I (Temp 1)	Government agencies, other external organizations, faculty and student affairs administration, senior and executive management, the Board of Education
Accounts Payable	Lead Accounting Specialist III (1)	Vendors, staff/employees, management
Accounts Receivable	Accounting Specialist II (2) Accounting Specialist I (Temp PT 1)	Students, agencies, internal departments, employees, management

4. List each position in your unit, and briefly describe the responsibilities of each. Include part-time and work-study student hours.
- *Business Office Director - Oversee audit; Supervise staff & accounting deliverables; Planning and strategic support within division*
 - *Senior Accountants (3) - Accounting, financial reporting, financial systems and analysis, project management*
 - *General Accountant (position vacant/open) - same as above*
 - *Accounts Payable Lead - Accounts Payable function, Lead over AP & AR*
 - *Accounts Receivable Specialists (2) - Accounts Receivable function*
 - *Accounting Specialist Temps (2 – 1 PT, 1 FT) - Accounting support*
5. Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the College's mission?
- *Needs that our Office cannot currently meet are related to keeping up on bank and other account reconciliations, fund accounting and other financial reporting that the General Accountant I position performs, which are necessary for the effective financial management of the college. The General Accountant position went vacant in November, and we are*

currently using temp staff and existing staff to cover workload. Allocation of workload is presently being assessed.

- *Other needs and demands that our Office has not been able to meet include the time and capacity to work on necessary items such as the creation and updating of Administrative Procedures and Board Policies, implementation and documentation of better procedures around certain college business operations, and cultivating proactive planning and strategy agendas for the department and its functions. It may also include having focused staff for technology/automation implementation to move the college forward into generational payment platforms that are inherent in serving the needs of our students. This relates to the mission of the College in that serving students through means that are familiar and convenient to them will assist in student success, providing ease and timeliness for both student and college during the payment cycle.*
- *Additionally, through the closure of Rogue Central in 2021, and the lack of a centralized area to receive and address most of students' inquiries (e.g. financial aid, curriculum changes, payment related questions), from the perspective of the Business Office A/R team, a single student call will result in multiple departments/staff having to review the same student account for the most frequently asked questions. The Needs that is not being met include efficiencies intra-departmentally, and perhaps more importantly, a cohesive experience for the student that saves time and frustration.*
- *Another Need that is necessary to implement but the Office does not currently have the time or resources to do so, is to develop and provide comprehensive training to RCC staff on accounting procedures.*
- *Finally, a Need within the department is that there does not seem to be enough margin in staff time and workload that will allow staff to take meaningful vacations and not continuously need to manage their 300-hour-lose-it threshold.*

6. How could the College help your unit do its job better?

The College can help the Business Office do our job better by adhering to policies and procedures in place, reaching out to accountants to ensure proper procedures are followed if not certain what they are, and greater collaboration between departments and divisions.

7. In what ways does your unit relate to other units of the College, academic and nonacademic? For example, what services do you provide to other units? What services do other units provide to you? On what tasks do you collaborate with other offices?

The Business Office provides reporting, financial analyses, and expertise to all divisions as well as senior and executive management. A key aspect to our work is providing accurate and timely financial statements, tuition and fee projections, and other financial reporting necessary to make sound management decisions.

- *Financial Aid and the Business Office (A/R) work collaboratively to ensure students are receiving the correct financial aid and to ensure students are not over-refunded.*

- *Business Office works collaboratively with Curriculum & Scheduling and Community and Workforce Development to ensure the correct fees are added to course offerings.*
- *Our Office works collaboratively with the Budget Coordinator in providing accurate budget information for current and upcoming fiscal years.*
- *Our Office works with Purchasing in maintaining the College capital assets (adding new, removing, selling, etc.), maintaining these in Asset Keeper and in Excel.*
- *Our Office works with the Auxiliary Services Director on the reconciliation and financial setup of Marketplace accounts.*
- *Our Office works with departments that have grants to determine compliance with grantors and statutory requirements. We develop procedures that comply with RCC's policies and procedures and meet the intent of the grant request.*
- *Our Office works with Institutional Research & Effectiveness on Dashboards and data analyses. People, Culture & Safety & the Business Office work collaboratively to ensure that personnel costs are properly recorded and reflected in the accounting records of the college.*

8. What skillsets and resources does your unit possess that can be shared with other units at slack times?

During slack times, senior accountants can provide budget assistance to Budget Coordinator. Financial Systems Accountant may provide assistance to departments such as I/R and I/T related to other reporting and projects not under the Business Office umbrella, ERP implementation work, and other financial systems expertise & reconciliation. Our office assists other areas with creating purchase orders. Staff also assist in special committees that work with student appeals.

9. Which individuals in your unit are cross-trained, and in what areas?

- *Staff in A/R and A/P are cross-trained on critical duties for the college.*
- *Accountants are generally cross trained to pick up JE's, fund review, reporting requirements, federal drawdowns. There are areas within the senior accountant group that can be better backed-up, cross-trained and documented.*
- *Accountants are cross-trained on some budget work.*

10. What resources do you need to improve your services to a superior level?

Our Office needs to:

- *Fill our vacant position and reallocate workload to improve efficiencies, maintain internal controls, and allow for greater margins to work on items in Question #5.*
- *Free staff time to work on ERP implementation -*
 - *Includes keeping Student/Temp Employee part of full-time during ERP implementation to mitigate workflow slippage*

11. What technologies are available to you to provide your services better? What training do you need to be more effective users of the technology?

- *TouchNet Payment Technologies – it is available in general; RCC has not yet employed it yet*
 - *This technology would streamline and improve the payment process and experience for students*
- *SmartSheets, Docusign*
 - *This would assist in streamlining the Agency payment process and the internal review of journal entries and other documents, improving controls, efficiencies and organization*
- *Power BI*
 - *This would assist in real-time dashboards/reporting*

12. What one thing do you wish you could do differently to improve your effectiveness but have not had the opportunity, time, or resources to do?

- *One thing that we can do differently to immediately improve the effectiveness of our Office is to integrate this Prioritization work annually, in assessing and measuring our annual performance as well as our work as it relates with other divisions.*

13. How do you review and evaluate your department's yearly performance?

- *The annual audit flushes out any issues in financial statements, mis-statements, corrections that need to be made, processes to assess, etc.*
- *Employee annual reviews help to evaluate the individual and overall performance of the department.*
- *Review timeliness of reporting and other deliverables*
- *Reviewing the number of mistakes with journal entries, refunds, reporting, and other deliverables that are published.*

14. What support will your unit need to provide during the ERP implementation?

- *Our Office will need to free up at least one staff person's time by at least 50% for the next two years starting mid/late Spring.*
- *Director's time can be freed up by 25% to continue to maintain current deadlines, and work to push initiatives and goals forward.*
- *Additionally, we would benefit from retaining our PT Temp working at TRC to ensure gaps are filled as needed*
- *This is assuming we fill our full-time vacant accounting position.*

15. Explain how your unit could function with:

- A 10 percent reduction in staff; in non-personnel resources
 - *A 10% reduction of staff/staff time would impact the level of service for our department through the inability to promptly and thoroughly answer calls and emails from students, agencies and internal staff; it may also affect the ability to stay organized and up-to-date through the appropriate filing and scanning of documents and back-up files necessary to establish required audit trails.*
 - *A 10% reduction of non-personnel resources would likely entail computer equipment for department not getting replaced when planned/needed, which would result in slower*

computing times and workflow; may reduce number of trainings for staff on fiscal management that is critical in meeting industry standards and requirements.

- A 20 percent reduction in staff; in non-personnel resources
 - *A 20% reduction of staff/staff time would impact the ability to effectively and proactively move projects and college initiatives forward. Additionally detailed financial accounting, analysis and review work may not occur at a substantive level, or are delayed, thereby producing more errors and increasing the risks of financial misstatements.*
 - *A 20% reduction of non-personnel resources would include not replacing computer equipment when needed, inability to attend necessary trainings on fiscal management, and potentially, the inability to maintain dues/membership with professional associations that are educationally imperative to the financial operations of the college.*
- *We are currently operating with reduced staff, given the loss of our General Accountant last November. While we currently have a temp, not all the duties have been trained on. Due to current resources and priorities, we are assessing our hiring needs, reassignment of work, and other means to continue to maintain our responsibilities.*
- *Due to our current staffing, we are behind on account analysis, and other various clean-up work. The department is booking overtime to get the essentials done. Some reports (not federal/state/locally mandated, or critical financial statements) are not as timely. While we are working to improve efficiencies, it is proving difficult to keep up on some necessary work items, let alone projects. However, we continue to work on process improvements in addition to cross-training to meet our collective Office needs.*

Contract and Procurement

1. What are the main objectives of your unit, and how do you measure success in achieving them?

To provide support and oversight of the College's procurement of goods and services within the statutory requirements of the State of Oregon and Board of Education approved procedures. The department is responsible for ensuring that proposals and quotes are accurate and that orders are placed in a timely manner. Contracts are written and/or reviewed for legal requirements and to include appropriate terms and conditions that are in the College's best interest.

Responsible for the development and implementation of College policies and procedures related to public procurement consistent with the College's mission and strategic goals. The Contract and Procurement Office develops, reviews, and manages the administration of College contracts, leases, and purchasing functions. Manages formal solicitation processes assuring compliance with Oregon Revised Statute (ORS) and Oregon Administrative Rule (OAR) for College projects including building renovation, new construction and procurement of equipment and services. Responsible for the research and interpretation of contract law, mitigate contract risk and assure compliance with federal, state and local laws in relation to public procurement and contracting for the institution. Acts as committee members for Participating Oregon Community Colleges in the development and maintenance of the Community College Rules of Procurement.

Statutory and Board related requirements are measured through clean audits and no complaints or findings. Customer service to internal staff is measured by the accuracy and quality support provided including being responsive to meeting the needs of staff and student-facing programs. This includes meeting deadlines in placing orders for departments and reviewing or creating agreements for services to allow internal departments to do their work and meet their objectives without undue barriers.

2. What services or activities in your unit are mandated and what is the estimated time to perform these services or activities?

The activities of the Contract and Procurement Office are largely mandated by the laws of the State of Oregon and Federal Procurement Law. All activities are reviewed to ensure mandates are met. Examples include: purchasing from State or Cooperative Purchasing groups that have been vetted and hold allowable contracts. The purpose of this is to create fair and non-biased procurement practices which allow for competition that does not unduly harm a vendor and benefits the public with the lowest total cost. Following the Board approved fiscal threshold limits that dictate whether Board approvals are required, formal solicitations are written and posted, or that three quotes are gathered and reviewed to determine fiscal responsibility. The estimated time to perform the above services and activities is at least 60% of the daily activities.

3. What are the services that your unit provides and to which customers (students, faculty, staff, donors, others)?

The major services are listed above but do include setting up vendors in the College's ERP system, verifying changes to vendor accounts, researching items or services for departments that may be non-standard, regular training on how to use the ERP system and appropriate procedures, asset management including inventory, and sales/disposal of surplus property. The department maintains all College contracts relating to goods and services including IT software agreements, leases, Independent Contractor agreements, Intergovernmental agreements, Construction Services agreements, and misc. services. The department provides services primarily to staff and faculty within the College with some collaborations with state agencies, community colleges, and community members.

The department advises and supports faculty and staff regarding the appropriate due diligence in procuring goods and services including the appropriate contracting methods in accordance with contract law, OAR, ORS and CCRP.

4. List each position in your unit, and briefly describe the responsibilities of each. Include part-time and work-study student hours.

Contract and Procurement Director – Implements College policies and procedures related to public procurement. Oversees and supervises the central contracting and procurement activities of the College as listed below.

Procurement Specialist – Facilitates the procurement of goods and services as needed for all College Staff. This includes verifying the appropriate methods for procuring goods to ensure the most cost-effective price and quality are purchased within State and Board-approved policies and procedures. Reviews all College purchase orders and places orders with vendors, monitors the procurement processes to ensure orders are processed and when items will be delivered. Administers the College's P-Card program. Provides training on the College's ERP systems for purchasing and travel.

Contract Specialist – Facilitates and reviews a variety of contract documents including terms and conditions required for procuring goods and services to verify they are in accordance with State and Board-approved policies and procedures. Interprets staff requests for needs and translates them into legally binding contracts that enable staff to procure services and specialty items. Verifies, sets up, and maintains vendor files. Maintains the asset database and inventories for College capital assets by coordinating with all departments. Facilitates the sale and disposal of surplus property for the College.

Temporary Classified (unfilled) – provides administrative support including archiving and organization of contracts, leases, and other documents per retention requirements.

5. Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the College's mission?

Current needs and demands of the department are being met at minimum levels. The need for streamlining processes and creating and implementing policy and procedures to support College staff/students is not able to be fully prioritized due to the day-to-day demands on the department.

6. How could the College help your unit do its job better?

Continue to provide training opportunities for staff to pursue CEU's for certifications and to update skills to stay current in OAR and ORS requirements. Continue to work toward the implementation of an ERP system that supports the procurement processes by eliminating some of the manual processes that take valuable time.

7. In what ways does your unit relate to other units of the College, academic and nonacademic? For example, what services do you provide to other units? What services do other units provide to you? On what tasks do you collaborate with other offices?

The department collaborates on a regular basis with Shipping and Receiving, Business Office, Facilities, and Administration. All College departments procure goods and services and rely on the Contract and Procurement staff for guidance and support.

The need to collaborate includes confirming approvals from key stakeholders in the process. Including Facilities for furniture, appliances, and exceptions for purchasing heating and air devices to ensure standards are maintained; IT for procuring software that meet internet safety, security, and accommodation requirements for the College; Business Services to ensure invoicing and /or payments are consistent with contractual agreements and that audit requirements are met including coordinating with College departments to complete capital asset inventory; as well as Risk Management and the Operations and Finance Team to ensure that contracts and purchases are created in a manner that mitigates risk to the College both physically and financially.

8. What skillsets and resources does your unit possess that can be shared with other units at slack times?

Knowledge of the College structure; generally accepted accounting principles; fund accounting; Oregon Revised Statutes, Oregon Administrative Rules; in-depth knowledge of procurement and contract law; College policies and procedures; applicable legal requirements, policies, procedures, and compliance with ethics law.

Skills: Accounting and financial practices; organizational and supervisory skills; project management skills; decisiveness; strong verbal and written communication skills; listening skills; effective conflict-resolution and problem-solving skills; planning and organizational skills; computer skills, preferably in Microsoft Office Suite® products; and math skills.

Ability to: Understand, apply, and demonstrate the College's core leadership competencies. Perform detailed work involving written and numerical data; review documents rapidly and accurately; analyze data, think creatively, make decisions, and prioritize; manage multiple projects

effectively and efficiently; proactively problem solve; plan, supervise, train, and develop staff; collaborate and communicate effectively and respectfully with all College staff, vendors and the public; work effectively and collaboratively as a member of various councils, and committees; cope effectively with conflict; operate a 10-key calculator, computer, and other office equipment.

9. Which individuals in your unit are cross-trained, and in what areas?

Departmental staff are cross-trained in other areas of the College. The Procurement Specialist has worked in the Business Office in AP including some audit functions. The Contract Specialist has not been formally cross-trained in other tasks outside the department but has a working knowledge of the Facilities department and administrative needs. The Contract and Procurement Director has been cross-trained in many areas of the College such as Business Office processes including, audit and accounting functions, grant and financial reporting, and the development of policies and procedures; Risk Management areas including requesting certificates of insurance, Department of Motor Vehicle records management; Student Affairs including a working knowledge of financial aid processes, marketing and recruitment, and grant administration.

10. What resources do you need to improve your services to a superior level?

Continued access to training to ensure knowledge of mandated requirements so that the College continues to be in compliance. There are software programs that could be purchased that would assist in the operations of a contract and procurement unit which would eliminate some manual processes so that staff could focus on maintaining policies and procedures and other processes.

11. What technologies are available to you to provide your services better? What training do you need to be more effective users of the technology?

The department uses the current ERP system, Smartsheets, DocuSign, Document Imaging, Asset Keeper, GovDeals Online Auction, and Microsoft programs. There are cloud-based technologies for posting of solicitations, tracking contracts and capital assets that could be purchased to assist.

12. What one thing do you wish you could do differently to improve your effectiveness but have not had the opportunity, time, or resources to do?

Procurement should be involved in the initial conversations around needs that include purchases, contracts and researching solutions for other College departments so that Procurement staff can understand the needs and assist from the start of the project. Most often Procurement is not included, and when the department is ready to move forward staff is not up to speed as to the need and often need to rearrange other projects and start from scratch with gathering information. This slows down the process for both Procurement and the College.

13. How do you review and evaluate your department's yearly performance?

Annual reviews are only part of the picture. The Goals of the department are largely based on the needs and goals of other divisions and departments. The evaluation is largely determined by clean audits and positive relations with other areas.

14. What support will your unit need to provide during the ERP implementation?

There will need to be time involved in the implementation of the purchasing pieces of the ERP. Time for testing and to ensure that the system is understood so that we can train staff effectively within the statutory requirements.

15. Explain how your unit could function with:

A 10 percent reduction in staff

A 10% reduction would reduce the amount of support and service provided to other areas and create a longer turnaround in answering questions, processing orders and creating/reviewing contracts with deadlines being missed.

A 20 percent reduction in staff

A 20% reduction would reduce support and services as above but also would create inefficiencies in processes.

A 30 percent reduction in staff

A 30% reduction would only allow for time to do minimums without offering support to others. This would create an inability to keep up on the law and statutory requirements training which could result in negative audit findings.

What would be the consequences of other effects on service delivery in each case below?

A 10 percent reduction in non-personnel resources

A 10% reduction would create the need to re-evaluate the travel to campuses for inventory or other meetings, only traveling and purchasing items when deemed essential.

A 20 percent reduction in non-personnel resources

See Below

A 30 percent reduction in non-personnel resources

The Contract and Procurement Department does not have a large budget. The budget available allows for the purchase of supplies, updating computer equipment, and travel to other campuses as needed. Reducing by 20 or 30% would eliminate the ability to purchase needed office supplies and/or travel to other campuses for meetings etc.

Facilities Management, Planning, and Construction

1. What are the main objectives of your unit, and how do you measure success in achieving them?

To maintain campus building assets, grounds, and utility infrastructures in accordance with state and federal requirements to provide a safe and comfortable campus for enrolled students, college staff, and the public. Success is measured through key performance indicators derived from satisfaction surveys and work activities and requests tracked through a computerized maintenance management system.

2. What services or activities in your unit are mandated, and what is the estimated time to perform these services or activities?

Facilities Management, Planning, and Construction (**FMPC**) are mandated by local authorities having jurisdiction, state, and federal regulations for all construction activity and maintenance activities associated with public health and safety. The following activities are the services or activities but may not be all-inclusive or in order by importance: new and existing building construction; annual elevator certification, annual pressurized vessel certification, integrated pest management and annual chemical usage, indoor and outdoor campus janitorial services, daily indoor air quality management (filters, co2, outdoor air mixing, air changes/hour), ADA compliance, semi-annual and annual fire life safety compliance, potable water quality compliance with Oregon Water Resource Department, annual forest fuels reduction with ODF, annual OSHA compliance, confined space management and state compliance, sewer and annual stormwater compliance, pedestrian pathway and safety compliance, code required electrical service inspection and compliance. The time to perform these services and activities vary depending on the task and findings. However, current staffing levels limit the department's ability to commit sufficient staff time to self-perform some tasks and must rely on outsourcing services as necessary.

3. What are the services that your unit provides and to which customers (students, faculty, staff, donors, others)?

District facilities management, planning, and construction for all campus building assets, grounds, and utility infrastructures in accordance with state and federal requirements to provide a safe and comfortable campus for enrolled students, college staff, and the public.

4. List each position in your unit, and briefly describe the responsibilities of each. Include part-time and work-study student hours.

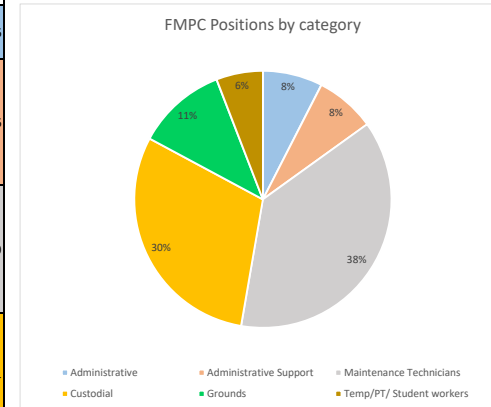
Exhibit A

Prioritization Process Question 4

Qty	Position	Total hrs/yr	% of total hours	Responsibilities
1	Director	1,848	4%	Responsible for the success of all facilities operations and staff district-wide; provides leadership in the development of campus and departmental goals and objectives, and fiscal planning and budget administration.
1	Construction Project Manager	1,848	4%	Responsible for large scale capital projects that include new construction and existing campus renovations. Currently providing assistance to FMPC for minor campus construction projects, including scope and plan development. Also providing development services for operational master planning that include but are not limited to: standard operating procedures of the unit; construction standards for A/E and contractors providing services at RCC; FMPC strategic planning; district energy management; CMMS development; KPI measures; long range capital planning; and other necessary reporting measures to college officials that are presently not being provided.
1	RWC Office Coordinator	1,848	4%	Provide administrative support to Director; interface with college & public; generate reports; manage purchase orders; manage work orders, dispatch workers; organize meetings; send out notifications to campuses; research & purchase dept supplies; maintain records; track & submit payroll documentation; check for space availability as needed; submit mileage & parking reimbursement requests; track utility meter readings; request trash & recycle pickups; provide dept orientation for new employees; hire student workers; order fuel; order dept uniforms; work with Energy Trust of Oregon on energy savings strategies; cover for other FOC
1	RVC & TRC Office Coordinator	1,848	4%	Provide administrative support to Director; interface with college & public; generate reports; manage purchase orders; manage work orders, dispatch workers; organize meetings; send out notifications to campuses; research & purchase dept supplies; maintain records; check for space availability as needed; submit mileage & parking reimbursement requests; request trash & recycle pickups; provide dept orientation for new employees; track & submit contracted custodial hours; track and submit HEC hours for billing; maintain building floorplans; obtain permits from City of Medford for RVC needs; cover for other FOC
1	District Electrician/Lead	1,848	4%	Lead electrician - manage all electrical projects, perform electrical work, work with contractors on major projects, assist leads with maintenance projects, acts as additional lead as needed
1	RWC Maintenance Lead	1,848	4%	Coordinate and oversee all routine maintenance, in addition to repairs, moves, events, and major projects. Work with contractors (construction, renovations, HVAC installations, large repairs)
1	RVC Maintenance Lead	1,848	4%	Coordinate and oversee all routine maintenance at RVC, in addition to repairs, moves, events, groundskeeping, and major projects. Work with contractors (construction, renovations, HVAC installations, large repairs).
1	TRC Maintenance Lead	1,848	4%	Coordinate and oversee all routine maintenance, in addition to repairs, moves, events, groundskeeping, and major projects. Work with contractors (construction, renovations, HVAC installations, large repairs).
2	RWC Maintenance Technicians	3,696	8%	Maintenance and repair of facilities (buildings, equipment & vehicles): minor electrical issues; plumbing; carpentry; renovations; installations; HVAC operation; furniture and office moves; event setups and teardowns; mitigate safety issues; deliver large items; assist groundskeepers & custodians as needed
1	RWC Maint Tech, IPM Coordinator	1,848	4%	Maintenance technician responsibilities, also in charge of locks & keys, and serves as IPM coordinator
1	RVC Maintenance Technician	1,848	4%	Maintenance and repair of facilities (buildings, equipment & vehicles): minor electrical issues; plumbing; carpentry; renovations; installations; HVAC operation; furniture and office moves; event setups and teardowns; mitigate safety issues; deliver items; groundskeeping; custodial tasks as needed
2	TRC Maintenance Technicians	3,696	8%	Maintenance and repair of facilities (buildings, equipment & vehicles): minor electrical issues; plumbing; carpentry; renovations; installations; HVAC operation; furniture and office moves; event setups and teardowns; mitigate safety issues; deliver items; perform groundskeeping; custodial tasks as needed
1	District Lead custodian	1,848	4%	Lead custodian - directs/coordinates custodial work and maintains inventory for all campuses, in addition to performing all custodial tasks (below)
3	RWC Custodians	5,544	12%	Clean restrooms, classrooms and common areas; maintain tile and carpeted flooring; do COVID sanitizing; keep all dispensers full and functioning; assist with event setups and teardowns; assist maintenance staff as needed; correct safety & health hazards
4	TRC Custodians	7,392	16%	Clean restrooms, classrooms and common areas; maintain tile and carpeted flooring; do COVID sanitizing; keep all dispensers full and functioning; assist with event setups and teardowns; assist maintenance staff as needed; correct safety & health hazards
1	RWC Landscaper	1,848	4%	Responsible for all landscaping, keeping walks and parking lots clear; advise and assist RVC & TRC crews as needed; manage fire fuel reduction; maintain water system; maintain fountain; assist with IPM; work with contractors on larger projects
2	RWC Groundskeepers	3,696	8%	Maintain grounds - mowing, leaf clearing, irrigation; clearing walks and parking lots; water testing
2	Student Employees*	2,280	5%	Primarily assist with groundskeeping at RWC
1	Temp Employee	599	1%	Primarily assist with maintenance & custodial at RWC
28	Totals	49,079		

Permanent Employee
 Total Hours calculation:
 164 FT Hours/Month
 x 12 Months/Year
 1968
 -80 2 wk vacation
 1888
 -40 1 week sick time
 1848

Category	% of total hours	Total Hrs/Year
Administrative	8%	3,696
Administrative Support	8%	3,696
Maintenance Technicians	38%	18,480
Custodial	30%	14,784
Grounds	11%	5,544
Temp/PT/ Student workers	6%	2,879



*We have 20 student employee allocations @ \$1400 per allocation

5. Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the College's mission?

The department has experienced extensive staffing reductions over the years, including upper and middle management positions to a single district-wide manager and limiting the department's span of control. Consequently, some of the standard managerial requirements or developments of the department have had to either be halted altogether or significantly delayed for prioritization. The following have been identified as essential development needed by the department and that are essential to the college's mission:

- Development, Implementation, and management of FMPC strategic plan.
- Development of standard construction procurement documents for both large and small building modification projects in coordination with the Director of Contracts and Procurement.
- Development, implementation, and management of sustainability planning and construction processes for district facilities.
- Development and management of District Facilities Condition Index.
- Development and implementation of Long-range capital planning tied to Facilities Condition Index.
- Development and implementation of department standard operating procedures for all services provided.
- Development, implementation, and oversight of a district energy management system and utility portfolio. Provide quarterly written and verbal reports to college leadership and elected officials.
- Development and implementation of a department succession plan.
- Develop and implement a plan of staff improvement opportunities tied to staff performance reviews and succession planning.
- Development, implementation, and management of preventative maintenance program
- Development and implementation of a work request prioritization procedure and method of communicating prioritization timelines to all departments.
- Development, implementation, and management of asset inventory program that is tied to a preventative maintenance program.
- Development of Key Performance Indicators (KPI) tied to work order and preventative asset program data. Provide quarterly reporting to VP of operations on KPI milestones.
- Develop and implement a materials inventory management plan. Tie to budget and capital planning.
- Development and implementation of a master permit program with the city for all district in-house electrical work.

Staffing reductions have also required higher salaried licensed trade staff to absorb entry-level non-licensed required tasks. Consequently, work request assignments are not solely based on strategic roles and responsibilities and instead based on reactive maintenance demands, which can create a backlog of deferred maintenance. Campus moves and event management that require setup and breakdown are a good example of the present impact on staff time management resulting from past reductions to FMPC.

6. How could the College help your unit do its job better?

Provide the staffing resources and support needed to centralize services that have been decentralized over time and the resources necessary for the department to fully develop the services and reporting requirements that are industry standard to a facilities management, planning, and construction operation of a public agency. The addition of 1 full-time sustainability coordinator for district utility reporting, building automation controls, sustainability, and climate action plan initiatives in

coordination with the college president's climate commitment. The savings realized from this position would help to support the position.

7. In what ways does your unit relate to other units of the College, academic and nonacademic? For example, what services do you provide to other units? What services do other units provide to you? On what tasks do you collaborate with other offices?

Please see the response to question 3 above. FMPC services are provided to all users of the college campuses district-wide and included but are not limited to new building construction and existing space renovations, building climate control and air quality maintenance, campus utility infrastructure, and overall maintenance of buildings and campus grounds to provide safe, clean, and usable spaces on campus. FMPC collaborates with every office on campus to coordinate routine building maintenance, construction, and grounds services and to also coordinate requested services submitted to FMPC by other offices. The requested tasks range from minor picture hanging to major office remodel and other campus modifications.

8. What skillsets and resources does your unit possess that can be shared with other units at slack times? Generally, FMPC does not experience slack times, but if time were available, we could offer project planning resources that could help with time management.

9. Which individuals in your unit are cross-trained, and in what areas? Facilities Office Coordinator positions are cross-trained to provide office support for each county, and the necessary office coverage for the department when one of them is absent. Maintenance technicians are cross-trained to provide the minimum coverage necessary for both custodial and grounds services in the event regularly assigned staff are absent. Electrician/Maintenance Lead (acts as ML as needed). The lead custodian has some clerical training and can create POs for custodial supplies and travel requests as needed.

10. What resources do you need to improve your services to a superior level?

At least one middle management position to balance the department's span of control and development of operational master planning. Also, the addition of specific maintenance positions to shift operations towards a strategic plan of operations in lieu of reactionary planning.

11. What technologies are available to you to provide your services better? What training do you need to be more effective users of the technology?

Handheld field devices connected to CMMS and associated training to operate the technology, Metasys system operator training...

12. What one thing do you wish you could do differently to improve your effectiveness but have not had the opportunity, time, or resources to do?

To provide quarterly reporting to college administration regarding the mission-driven services listed in question 5 above.

13. How do you review and evaluate your department's yearly performance?

Annual staff evaluations and KPI measurements using MPULSE (CMMS) and internal electronic satisfaction surveys.

14. What support will your unit need to provide during the ERP implementation?

Assurance that ERP will not replace the Facilities CMMS and that the information needed by the college from the CMMS for the ERP can be provided by an integration program or other means than a CMMS replacement.

15. Explain how your unit could function with

- a. A 10 percent reduction in staff time.

FMPC staffing levels have already been reduced over multiple budget cycles to a below industry standard level and could not function with additional staffing reductions unless also reducing services provided. However, Since FMPC staffing is below industry standard, a reduction in services would compound deferred maintenance throughout the district and reduce the goal of maintaining a safe and comfortable environment for students, faculty, and staff. Generally, a reduction in custodial staff time, contracted service time, or maintenance technician time will require a corresponding closure in building sqft at the college.

- b. A 20 percent reduction in staff time
c. A 30 percent reduction in staff time
d. A 20 percent reduction in non-personnel resources
e. A 30 percent reduction in non-personnel resources
f. A 10 percent reduction in non-personnel resources

What would be the consequences of other effects on service delivery in each case?

For example, in 2019 the US Dept. of Education benchmark established the building sqft assigned to one (1) sufficiently supplied custodian in an 8hr shift could provide the following levels of service:

Level 1 Spotless, 10,000 – 11,000 sqft

Level 2 Intensive, 18,000-20,000 sqft

Level 3 Min required to ensure health and comfort of bldg. users, **28,000 – 31,000 sqft**

Level 4 Not generally acceptable for a school environment, **45,000 – 50,000 sqft**

Presently RCC staffing levels require each custodian at TRC to clean 39,016 sqft and each RWC custodian is assigned 43,621 sqft; both campus figures do not include assigned exterior building custodial and will need to be determined and added to these figures.

Current staffing levels are also similar for trades maintenance staff regarding building and grounds services that are provided by FMPC. Educational facilities staffing levels according to a national benchmarking survey conducted by Facilitiesnet suggests that the median number of sqft per full-time maintenance staff is 50,000. Including the addition of the new RWC Science Center, the college has approximately 568,200 building sqft to maintain, XXXXX sqft of hardscape, and approximately 107 acres located in both rural forested and urban areas. FMPC has 9 technicians and 3 groundskeepers. The following represents the current sqft per person assigned to technicians:

Buildings, 63,133 sqft/Technician

Grounds, 35.6 acre/groundskeeper

Grants

1. **What are the main objectives of your unit, and how do you measure success in achieving them?**

This position provides critical leadership for federal, state, and private sponsored or grant-funded projects. It increases the capacity of the college for developing, funding, and managing sustainable grant-sponsored projects by fulfilling the need for pre-award and post-award coordination to ensure the effective use of sponsored resources to achieve college strategic goals. It fosters an institutional climate of sustainable financial growth by developing and directing grant writing activities that leverage collaborative opportunities within the College, with State and Federal Agencies, and local community partners. It works with project directors/grant administrators to assure post-award grant compliance, which will include the development and administration of training.

2. **What services or activities in your unit are mandated, and what is the estimated time to perform these services or activities?**

Grants Coordinator Mandated Activities			
Services/Activities	Examples	Type of Mandate	Estimated Hours
Federal reporting	EDA continued use reports, maintenance of federal user profiles	Legally required for funding	
Non-profit reporting	Quarterly and End of Year reporting	Required to comply with grant agreements	
Internal reporting	Monthly grant report to E-Team, grant status reports, etc.	Internal mandate	
Grants strategic planning	Annual grant priorities	Internal mandate	

3. **What are the services that your unit provides and to which customers (students, faculty, staff, donors, others)?**

Other Services Provided		
Service	Provided To	Estimated Hours
Grant research	Faculty and staff	
Grant training	Faculty and staff	
Review and technical support	Faculty and staff	
Grant applications	Faculty and staff	

4. **List each position in your unit, and briefly describe the responsibilities of each. Include part-time and work-study student hours.**

Grants Coordinator, responsible for coordinating RCC grant programs.

5. **Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the College's mission?**

The need for creative and sustainable funding sources for College activities is an ongoing concern. At this time, we are able to maintain legacy grant programs, such as TRIO, and add to our portfolio.

6. **How could the College help your unit do its job better?**

Provide software and training opportunities as new technology develops that will streamline job processes. Provide opportunities for continuing education to keep informed of best practices and emerging areas for grant development.

7. **In what ways does your unit relate to other units of the College, academic and nonacademic? For example, what services do you provide to other units? What services do other units provide to you? On what tasks do you collaborate with other offices?**

The Grants Coordinator is accessible to any other unit or division at RCC to provide technical support and grant services for College grant activities. Grant-funded activities touch nearly all aspects and areas of RCC, and the Grants Coordinator works closely with Budget, IR, and Facilities to develop background information necessary to submit competitive grant applications. Outside of Operations and Finance, the Grants Coordinator works closely with staff from various academic programs, Student Affairs, Administration, RCCF, and community organizations to collaboratively research and write solid grant proposals.

8. **What skillsets and resources does your unit possess that can be shared with other units at slack times?**

The Grants Coordinator must possess a wide array of skills to be successful in managing grants at RCC. These skills include research and development, networking and relationship building, team coordination, project management, and verbal and written communication.

9. **Which individuals in your unit are cross-trained, and in what areas?**

None.

10. **What resources do you need to improve your services to a superior level?**

Continuing education in grant development and management, professional organization.

11. **What technologies are available to you to provide your services better? What training do you need to be more effective users of the technology?**

Various Windows applications, though I need training on Excel.

12. **What one thing do you wish you could do differently to improve your effectiveness but have not had the opportunity, time, or resources to do?**

The Grants Coordinator is the archivist for legacy grant programs and maintains files relating to grant activities past and present. The files need to be organized and indexed, and a retention schedule needs to be developed for each to ensure compliance with applicable guidelines.

13. **How do you review and evaluate your department's yearly performance?**

Since there is only one position in the unit, much of this can be accomplished with the annual performance evaluation, and by implementing a program review type process.

14. What support will your unit need to provide during the ERP implementation?

The Grants Coordinator doesn't work directly with the ERP.

15. Explain how your unit could function with

- a. A 10 percent reduction in staff time

As a single position, a reduction of 10% would necessitate the elimination of some of the services described under question 3, above.

- b. A 20 percent reduction in staff time

As a single position, a reduction of 20% would necessitate the elimination of more of the services described under question 3, above.

- c. A 30 percent reduction in staff time

As a single position, a reduction of 30% would necessitate the elimination of most of the services described under question 3, above, and reducing the number of internal mandates described under question 2, above.

- d. A 20 percent reduction in non-personnel resources

Reductions would impact the provision of important continuing education.

- e. A 30 percent reduction in non-personnel resources

Reductions would impact the provision of important continuing education.

- f. A 10 percent reduction in non-personnel resources

Reductions would impact the provision of important continuing education.

What would be the consequences of other effects on service delivery in each case?

IT -- Help Desk

1. What are the main objectives of your unit, and how do you measure success in achieving them?
 - a. Provide technical support for all aspects of desktop computer hardware and peripherals, including installation, maintenance, and repair. Respond to requests for installation, troubleshooting, and repair of computers, also provide computer lab support as needed. Works with and trains student technicians and staff in computer applications. Works with staff on purchasing of all computers and peripherals.
 - b. We measure success by the amount of time our systems are up and running so our end users can do their jobs.
2. What services or activities in your unit are mandated, and what is the estimated time to perform these services or activities?
 - a. Troubleshoot, configure, replace and repair hardware and peripherals used by the college staff, students, and faculty. These can include workstations, printers and toner management/ordering, mobile devices, scanners, external hard drives, speakers, and flash drives, etc – 15+ hours a week
 - b. Install, remove, troubleshoot, update, and configure software. These can include Microsoft Office suite, Adobe products, RCC's in-house applications and other third-party software. Document Imaging data maintenance and module creation, Operating System support includes all Windows family of products and Mac OS's – 10+ hours a week
 - c. Creating and deploying system images for staff. System images are one workstation configured as desired with all updates, needed software, and tweaks which make it a fully functional computer for the area it is intended to be deployed to. Once the master is created, that configuration is cloned to several other workstations so they have the same setup – 5 hours a week
 - d. Create, maintain, and troubleshoot staff ID/Access cards that staff use to get into all buildings and restricted areas within the college – 5 hours a week
 - e. Provide quotes for all areas of the college when asked, for all Computers, peripherals, software, and hardware – less than 5 hours a week
3. What are the services that your unit provides and to which customers (students, faculty, staff, donors, others)?
 - a. Computer support – All
 - b. Software support – All
 - c. Printer support - All
 - d. ServiceNow maintenance and incidents – All -
 - e. Papercut service and maintenance - All
 - f. Manage Engine support - All
 - g. Kace computer imaging for Faculty and Staff – All
4. List each position in your unit, and briefly describe the responsibilities of each. Include part-time and work-study student hours.
 - a. Help Desk Technician – Each technician is responsible for the same tasks at their campus. We have 4 total technicians, 2 at Redwood, 1 at Riverside, and 1 at Table Rock.

- b. Student Help Desk technician – Student workers help in day-to-day tasks, maintenance, cleaning, and inventory of the Help Desk office and its contents. We strive to teach each student worker the day-to-day activities of a help desk technician. Most of our student workers come from the Computer Science department and their students in the help desk technician program.
5. Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the College's mission?
- a. Help Desk, and IT in general, is a competitive market and getting personnel hired and trained is sometimes difficult. This hampers our ability to provide the best possible service to our end users due to a lack of staff. We prioritize our tasks on a daily basis to make sure our mission-critical services are up and running so our college can function and provide the best possible experience to our students.
6. How could the College help your unit do its job better?
- a. Help provide the needed staff to cover all the buildings and staff that are currently working for RCC. Having more staff could help us provide support on days and during hours we traditionally have not been able to provide.
7. In what ways does your unit relate to other units of the College, academic and nonacademic? For example, what services do you provide to other units? What services do other units provide to you? On what tasks do you collaborate with other offices?
- a. All of our services are used by all units at the college.
8. What skillsets and resources does your unit possess that can be shared with other units at slack times?
- a. We know most of the software that is used at the college, so there would be a small learning curve in the how's and why's related to processes.
 - b. Computer skills and knowledge of how they work
 - c. Software knowledge and the ability to troubleshoot the interaction between systems and software.
 - d. Customer service skills to provide the best experience to our customers
9. Which individuals in your unit are cross-trained, and in what areas?
- a. All of our Help Desk Technicians have the knowledge to help in Media, and some tasks for Network services.
10. What resources do you need to improve your services to a superior level?
- a. Training for new and current technology.
 - b. More technicians to help with growing number of buildings that have staff and computers.
11. What technologies are available to you to provide your services better? What training do you need to be more effective users of the technology?
- a. More training in current software that is used to help the College complete daily tasks.
 - b. More training in areas that we support to better understand some of the requests that come in.
 - c. More continued training on current software and hardware to keep up to date on current standards and best practices.

12. What one thing do you wish you could do differently to improve your effectiveness but have not had the opportunity, time, or resources to do?
- a. Attend more training for new and emergent technology.
13. How do you review and evaluate your department's yearly performance?
- a. We review reports from the ServiceNow software Help Desk uses for the incident ticketing system. We look at the number of tickets coming in and the completion rate of those tickets.
14. What support will your unit need to provide during the ERP implementation?
- a. Computer support for all staff helping with the implementation.
15. Explain how your unit could function with:
- a. A 10 percent reduction in staff time
This would result in lowering our response time to calls and incidents entered into our ticketing system.
 - b. A 20 percent reduction in staff time
This would hamper our ability to successfully help our end users and downtime would be significant on critical systems that are used every day.
 - c. A 30 percent reduction in staff time
At this level, we would only be able to provide certain services and others would start to degrade and no longer be viable solutions.
 - a. A 20 percent reduction in non-personnel resources
The software we use in our daily duties would no longer be available resulting in adding more manual processes and more time being spent on tasks, which in turn takes away from end-user support.
 - b. A 30 percent reduction in non-personnel resources
More software and tracking services will no longer be available and time spent by Help Desk Technicians doing these tasks manually will hamper the college as a whole. Downtime becomes significant for all staff.
 - c. A 10 percent reduction in non-personnel resources
Some software becomes unavailable and prioritizing tasks becomes necessary to provide as much service as possible without affecting downtime.

What would be the consequences of other effects on service delivery in each case?

The consequences of a reduction would be slow response times to issues that need immediate attention. Downtime of mandatory or mission-critical services because we don't have the staff to give the correct attention. Downtime of mission-critical services could result in the college not being able to provide the necessary services to our students, or meeting mandated reports and documentation to the state or federal levels.

IT -- Media

1. What are the main objectives of your unit, and how do you measure success in achieving them?
The main objective of Media is to provide staff and student support for all college resources connected to the network on and off-campus. Ensuring the day-to-day functions for the college to be successful are working and running smoothly. Our success comes from our end users being able to do their job successfully with minimal interruptions.
2. What services or activities in your unit are mandated, and what is the estimated time to perform these services or activities?
 - a. Computer imaging/configuration systems administrator – 10+ hours a week
 - b. Classroom technology maintenance – 15+ hours a week
 - c. Panopto servicing – 5 hours a week
 - d. Zoom administration – 15+ hours a week
 - e. Special event setup and takedown of all technology associated with the event. - Varies
 - f. Instructional software license management and procurement – 2 hours a week
 - g. Standards and best practices for all Instructional hardware and software – 2 hours a week
 - h. Instructional Domain administration Server/Network Administration...provides infrastructure for computer network use and configuration), including but not limited to: - 10+ hours a week
 - i. User account creation
 - ii. DNS Administration
 - iii. Group Policy Administration
 - iv. Instructional Domain policy printing
 - i. Instructional Domain server and storage administration – 5+ hours a week
 - j. Instructional patching, maintenance, backup, and disaster recovery administration – 5+ hours a week
 - k. Special projects - Varies
 - l. Procurement of new classroom and computer lab technology – 2 hours a week
 - m. Installation of new classroom technology - Varies
 - n. R/D of new computer and software technology and emerging technology that could benefit the college and our students – 5 hours a week
 - o. Student email administration: - 15+ hours a week
 - i. Password resets
 - ii. Display name changes
 - iii. Email changes for all name changes
3. What are the services that your unit provides and to which customers (students, faculty, staff, donors, others)?
 - a. All services mentioned above we offer to all Staff, Faculty, and Students as well as all guests and outside entities.
4. List each position in your unit, and briefly describe the responsibilities of each. Include part-time and work-study student hours.
 - a. CIO

- b. Special Projects Coordinator
 - c. Instructional Media Specialist II (2)
 - d. Instructional Technology Administrator
 - e. IP Video Network Coordinator
 - f. Instructional Media Specialist I
5. Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the college's mission?
- a. We see demands for special events from RCC departments as well as from outside agencies that we can't support at the requested levels due to staffing.
6. How could the college help your unit do its job better?
- a. We service every aspect of the college regardless of division, so adding more staff members would be the best way to help us get the job done.
 - b. Giving us more input on the hardware and software being purchased.
 - c. When adding new buildings or making changes to existing buildings, bringing us in to talk about computer needs, software needs, additional support that will be needed, or any additional computer labs would be extremely helpful in discussing and coming up with a plan that works for everyone.
 - d. Making it mandatory to discuss any software that is wanted to be purchased so the compatibility and feasibility of the new software working with what we currently have and possibly avoid any redundant software purchases are discussed and considered.
7. In what ways does your unit relate to other units of the college, academic and nonacademic? For example, what services do you provide to other units? What services do other units provide to you? On what tasks do you collaborate with other offices?
- a. We collaborate with all Instructional departments within the college for Classroom technology, software support for the computer labs, and Instructional accounts.
 - b. We collaborate with all divisions and outside entities on special event coordination, planning, configuration, set up, and takedown.
 - c. We help all staff with user accounts, data storage, email, computer troubleshooting, and all interaction within the Instructional Domain.
8. What skillsets and resources does your unit possess that can be shared with other units at slack times?
- a. What is slack time?
 - b. Within sister departments, we will share workload and responsibility. Media, Networking Services, and Help Desk work closely together to help and support during busy times, or times when staff are out and coverage is too low.
9. Which individuals in your unit are cross-trained, and in what areas?
- a. We are all crossed trained in the IT realm between Media, Help Desk, and Network services
10. What resources do you need to improve your services to a superior level?
- a. More training for staff on college resources we currently offer.

- b. More training on new and emerging technology to better provide services to the college.
 - c. More money to make the needed purchases of software and hardware.
11. What technologies are available to you to provide your services better? What training do you need to be more effective users of the technology?
- a. More training on current resources. Training will benefit end-users and support staff to understand better how our systems function.
 - b. Getting staff familiar with what we have available to them to use so possible redundant software purchases are avoided.
12. What one thing do you wish you could do differently to improve your effectiveness but have not had the opportunity, time, or resources to do?
- a. Help Communicate better with departments, divisions, and individuals so requests, suggestions, requirements, responsibilities, and issues are understood correctly between all parties involved.
13. How do you review and evaluate your department's yearly performance?
- a. Completion of projects
 - b. Satisfaction of end-users
 - c. The uptime of our resources
 - d. Issue response time – This info comes from end-users
14. What support will your unit need to provide during the ERP implementation?
- a. CIO will be a co-lead in the ERP project
 - b. We will assist in implementing several parts of the new ERP.
 - c. During the decision process, we will be helping choose the best vendor possible.
 - d. Helping to make sure our systems work with the new ERP system.
 - e. Support to staff during the ERP process and integration
15. Explain how your unit could function with
- a. A 10 percent reduction in staff time
 - i. Response time to issues would be delayed, causing possible downtime during a class interrupting the educational process.
 - b. A 20 percent reduction in staff time
 - i. At this level, some services would no longer be available
 - c. A 30 percent reduction in staff time
 - i. Services would be at a level where downtime would become significant, and some issues would not get attention till it was too late.
 - d. A 20 percent reduction in non-personnel resources
 - i. Additional time spent by staff working on tasks that are no longer automated would result in slower response times for issues that arise during the day
 - e. A 30 percent reduction in non-personnel resources
 - i. Services would be at a level where downtime would be significant, and equipment would cease to work, affecting classes and day-to-day work for all computer labs and classrooms users.
 - ii. No new labs or classrooms

- f. A 10 percent reduction in non-personnel resources
 - i. Slower response time to issues and problems in computer labs and classrooms.

What would be the consequences of other effects on service delivery in each case?

If we had to start limiting what services we offer or what support we offer, this would affect downtime and this would begin to affect classes and the support our other departments offer to students.

IT – Network Services

1. What are the main objectives of your unit, and how do you measure success in achieving them?
The main objective of IT Network Services is to provide a reliable, secure and robust network, server, and cloud infrastructure for the successful educational experience of our clients. We measure our success in uptime to resources and how well we protect the college's data and IT infrastructure.
2. What services or activities in your unit are mandated and what is the estimated time to perform these services or activities?
 - E-Mail/M365 Administration – 8 hours per week
 - Hybrid Exchange Administration - 1 hour per month
 - Okta Multi-Factor Authentication – 5 hours per week
 - Teams/SharePoint/MS Collaboration Administration - 2 hours per week
 - PowerBI/PowerApps/DataVerse Administration - 2 hours per week
 - LAN/WAN Switch Administration - 1 hour per week
 - Firewall/DMZ/WAF Administration - 2 hours per week
 - Wireless Infrastructure Administration - 2 hours per week
 - Admin Domain Account/Active Directory Administration - 10 hours per week
 - Azure Single Sign-On Administration – 1 hour per month
 - Backup & Disaster Recovery Administration - 5 hours per week
 - Data Security & Compliance Administration - 2 hours per week
 - Internal/External DNS Administration - 1 hour per month
 - Infrastructure Monitoring - constant passive monitoring during business hours
 - Centralized Endpoint Security Administration - 2 hours per week
 - Admin Server/Storage Administration – 1 hour per week
 - Hyper-V and Failover Cluster Administration - 2 hours per week
 - IT Policy and Procedure Creation and Updating – 1 hour per month
 - IT Special Projects – 16 hours per week
 - Communications and Collaboration - 12 hours per week
3. What are the services that your unit provides and to which customers (students, faculty, staff, donors, others)?
We provide faculty, staff, and student workers access to the network, server, cloud/O365 administrative resources. And we provide internet and wireless access to faculty, staff, student workers, students, and community members.
4. List each position in your unit, and briefly describe the responsibilities of each. Include part-time and work-study student hours.
 - **Director of IT – Network Services -**
 - Responsibilities include direct oversight of the Network Administrators and prioritizing their task and project lists in relation to the department's mandated services. Representing IT Network Services in meetings. And direct administration of the following RCC resources:
 - Azure/M365 Enterprise Account Administration

- DataVerse/PowerBI/PowerApps Platform Administration
- Data Security & Compliance Administration
- Creation and Updating of IT Policies and Procedures
- **Network Administrators (4) -**
 - Responsibilities include all specific administrative duties under question #2 not specifically noted in the *Director of IT – Network Services* description above

5. Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the College's mission?
Currently, the specific area that we cannot currently meet is 24/7/365 layered security monitoring and response. This relates to the mission in that if educational resources are to be accessible to our community, they need to be presented with appropriate safeguards and oversight.
6. How could the College help your unit do its job better?
Understand that the security policies and procedures that we implement are necessary. And that all college faculty, staff, and students must play an active role in ensuring that our data resources are safe and secure.
7. In what ways does your unit relate to other units of the College, academic and nonacademic? For example, what services do you provide to other units? What services do other units provide to you? On what tasks do you collaborate with other offices?
We provide connectivity to all data and IT communications resources that all units in the college utilize to do their daily work. The rest of Operations and Finance keep a climate-controlled roof over our head, the contracts in place, and the bills paid for the services we use. Student Affairs keeps our student clients coming in the door. And Instructional Affairs fulfills their educational needs, which we need for an improved reputation in the community and continued growth.
8. What skillsets and resources does your unit possess that can be shared with other units at slack times?
If we had slack times we could hold workshops on the use of resources within M365 such as Teams. Or hold them on how to spot spearfishing e-mail SPAM.
9. Which individuals in your unit are cross-trained, and in what areas?
All members of the team are cross-trained in at least three of the services listed in question #2.
10. What resources do you need to improve your services to a superior level?
Expanded budget to meet the ever-growing threat vectors that the college's IT infrastructure faces.
11. What technologies are available to you to provide your services better? What training do you need to be more effective users of the technology?
Communications and collaboration resources such as Teams Channels and Chat and Zoom meetings are key for us as we move thru our priority list each week. Specific training in IT Security along with advanced Firewall and M365/Azure data security training would be helpful.

12. What one thing do you wish you could do differently to improve your effectiveness but have not had the opportunity, time, or resources to do?

Implement a better project planning and tracking process.

13. How do you review and evaluate your department's yearly performance?

We look at several variables including:

- IT resource uptime
- Project completion
- Our ability to keep technology versions such as server operating systems and switch firmware versions up to date
- Employee morale and completed training opportunities
- Maintenance processes and completion of patching
- Evaluation of downtime incidents and their resolution

14. What support will your unit need to provide during the ERP implementation?

Our role is traditionally in connecting our data resources to the ERP platform and making sure data flow stays secure.

15. Explain how your unit could function with

- A 10 percent reduction in staff
 - i. With a department of 5 this would mean taking one staff member to part-time, which would cause that employee to leave RCC for full-time work and would result in a 20% reduction in staff. This would lead to the redistribution of the listed mandates in question #2, so more work for each staff member.
- A 20 percent reduction in staff
 - i. This would mean the layoff of one staff member and the redistribution of the listed mandates in question #2, so more work for each staff member.
- A 30 percent reduction in staff
 - i. This would mean the lay-off of one employee and another going part-time, which would again cause that employee to leave RCC for full-time employment. The end result would be a 40% reduction in staff and an untenable amount of work redistributed to the other staff members.
- A 20 percent reduction in nonpersonnel resources
 - i. Equipment lifecycle would have to be extended as we would not be able to keep up with our current upgrade cycle.
- A 30 percent reduction in nonpersonnel resources
 - i. Equipment lifecycle would have to be extended and an evaluation of service contracts for RCC IT software/services would have to take place to let go of some services.
- A 10 percent reduction in nonpersonnel resources
 - i. Equipment deployments would have to be evaluated to see if we could get by with a smaller replacement structure.

What would be the consequences of other effects on service delivery in each case?

- Our department's job is to largely go unseen with all of the work we do. To keep downtime to a minimum and work to ensure that services are improving while keeping IT infrastructure secure. With less resources and personnel, we would not be able to maintain that service level.

IT – Programming Services

1. What are the main objectives of your unit, and how do you measure success in achieving them?
Our unit services and maintains all RogueNet applications and peripheral software, and additional plugins and interactions.
2. What services or activities in your unit are mandated, and what is the estimated time to perform these services or activities?
All data reports and databases within RogueNet are maintained by our unit. Our job is to keep RogueNet and all the interactions with peripheral software up and running to provide the needed access and reporting to all departments, for any school, state, or federal mandate. – 40+ hours a week
3. What are the services that your unit provides and to which customers (students, faculty, staff, donors, others)?
We offer support and enhancements for all college employees who use RogueNet.
 - i. AdminView
 - ii. Advising
 - iii. Authorize
 - iv. Budget
 - v. CourseManagement
 - vi. Disability Services
 - vii. FinAid
 - viii. Online Reports
 - ix. Placement Tests
 - x. PT Contracts
 - xi. RAPS
 - xii. Retention
 - xiii. StdContracts
 - xiv. Tracker
 - xv. Support Services
 - xvi. Website maintenance
 - xvii. Backend website programming and development
 - xviii. Accessibility tracking and auditing on all web pages for RCC
4. List each position in your unit, and briefly describe the responsibilities of each. Include part-time and work-study student hours.
 - a. 2 programmers
 - b. 1 Website administrator
5. Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the College's mission?
We see daily requests for reports, changes, enhancements, and additions within RogueNet. With only 2 programmers these requests are prioritized and worked on with that prioritization in mind. These tend to delay some requests that are more of a want than a need.

6. How could the College help your unit do its job better?
Better understanding that most of these jobs take time and that patience is one of the most important things to have when working with our programmers.
7. In what ways does your unit relate to other units of the College, academic and nonacademic? For example, what services do you provide to other units? What services do other units provide to you? On what tasks do you collaborate with other offices?
We interact with all employees at one point or another during their career at Rogue. Everyone right now uses RogueNet.
8. What skillsets and resources does your unit possess that can be shared with other units at slack times?
Knowledge of computers and programming.
9. Which individuals in your unit are cross-trained, and in what areas?
We are not really crossed trained, our focus has always been RogueNet and everything that goes with it.
10. What resources do you need to improve your services to a superior level?
Time, money, and personnel.
11. What technologies are available to you to provide your services better? What training do you need to be more effective users of the technology?
We use all technology we possibly can to improve our response time and accuracy in our projects. No training is needed at this time.
12. What one thing do you wish you could do differently to improve your effectiveness but have not had the opportunity, time, or resources to do?
Just more time and more programmers to help with the workload.
13. How do you review and evaluate your department's yearly performance?
RogueNet uptime is a major factor in our job performance.
14. What support will your unit need to provide during the ERP implementation?
We will provide data, time, and backend RogueNet knowledge during the ERP implantation.
15. Explain how your unit could function with
 - a. A 10 percent reduction in staff time
Our standard level of service would degrade enough to start hampering what our staff does for students
 - b. A 20 percent reduction in staff time
Services would no longer be available
 - c. A 30 percent reduction in staff time
Mission-critical services would no longer be successfully maintained
 - d. A 20 percent reduction in non-personnel resources

Equipment would start to be unreliable and start to hamper day-to-day tasks

- e. A 30 percent reduction in non-personnel resources

Mission-critical equipment and software would start to no longer be supported and daily tasks would be affected

- f. A 10 percent reduction in non-personnel resources

Response time to some requests would start to be affected and possible downtime could be felt

What would be the consequences of other effects on service delivery in each case?

Our day-to-day tasks would not be supported in the way we have become accustomed, and response time would be delayed enough where downtime would begin being significant.

Institutional Research

1. What are the main objectives of your unit, and how do you measure success in achieving them?

Purpose and Mission:

To comply with mandatory reporting requirements and support RCC's ongoing improvement and mission fulfillment through an iterative strategic planning process that includes:

- gathering accurate, appropriate, and clear data,
- sharing it widely with the college community,
- identifying systemic strengths and weaknesses,
- supporting the development of initiatives for improvement,
- completing follow-up evaluations on their effectiveness.

Main Objectives:

- Meeting state, federal, and grant reporting requirements
- Providing data needed to make informed institutional decisions
- Tracking data for the measurement of institutional, divisional, and departmental objectives associated with Strategic Planning and supporting student success
- Sharing data with the college community to inform departmental decision-making

Measuring Success. Institutional Research measures success in achieving these goals three ways. The first is through the successful completion of the annual Culture of Evidence Plan, which is directly linked to the 1.D Standards associated with our Accreditation from NWCCU. The second way is through assessing whether or not the IR unit's annual goals are met. As the work of IR is strongly linked to accreditation, the work of Institutional Research is also assessed during the 7-year accreditation cycle by NWCCU site visitors.

2. What services or activities in your unit are mandated and what is the estimated time to perform these services or activities?

As part of the prioritizing process, the Institutional Research Unit performed a capacity analysis to determine the total available number of hours for project time. The calculation of available project hours was based upon the assumption of a 25% Administrative/75% project time split for each position. Project time was broken down into hour estimates based upon the major job duties in each position's PAQ.

The 25% Administrative Time was verified by totaling paid leave, including paid holidays and break time. In addition, an estimated total number of hours of administrative focused work, like Fall and Spring Inservice and mandatory trainings was computed. It was determined that 25% Administrative Time was an accurate estimate.

The project time estimates which follow are based upon a more 'routine' year (2021-22), and do not include additional hours to redevelop code sets and dashboards with the implementation of the new ERP.

Institutional Research Mandated Activities			
Services/Activities	Examples	Type of Mandate	Routine Estimated Hours (New ERP will require additional hours to recode everything)
Federal Reporting	IPEDS, Supporting Trio Reporting, EDA, & Other Web Page Requirements	Legally required For funding	785 Staff hours + 100 Director Hours = 885 hours
State Reporting (D4A)	Quarterly and End of Year reporting	Legally required for funding	
Other State Reporting	Guided Pathways, Math Corequisite,	Required for Grants	
Strategic Planning Metrics & Activities related to Strategic Planning	Disproportional Enrollment Report (Also required by State of Oregon), Student Engagement Surveys	Required for Accreditation	500 Staff hours + 200 Director Hours = 700 Total
Annual Department Planning Data	The Course Grades and Program Enrollment and Completion Dashboard reports (15 reports)	Required for Accreditation	350 Hours Development Note: By 2023-24, this likely will go down due to dashboard implementation as the data dashboards will be developed in the new system.
Program Review Data	Same as Annual Departmental Planning data	Required for Accreditation	
Misc. Grant Reports (not state related)	Oregon Student Success Grant, Guided Pathways Grant	Required for Grants	100 Staff hours + 50 Director Hours = 150 hours
Student Success Data	Data Now! Indicators of Student Success on the Web Page (5 Indicators with 6 disaggregated break outs for each report); ATD Early Momentum Metrics (Overlaps with Strategic Planning)	Required for Accreditation	500 Hours
Culture of Evidence Plan	Carrying out activities on the Culture of Evidence Plan in response to NWCCU recommendations from their April 2020 Site Visit; Overlaps with Strategic Planning	Required for Accreditation	350 Hours
Total Estimated Hours			2,535 Hours *
* This estimate does not include the portion of director time associated with supervision, but rather only includes focused project time and close working where the actual project is being worked upon.			

Roughly an estimated 75% of IR project time (Total estimated hours = 3,471) focuses on the completion of mandated activities listed above. This estimate does not include the 553 supervision focused hours on the part of the director, but reflects either individual project work or close work between staff and management directly on a project. The remaining 936 project hours are focused on unmandated activities listed below.

3. What are the services that your unit provides and to which customers (students, faculty, staff, donors, others)?

Other Services Provided		
Service	Provided To	Estimated Hours
Data to support grant applications	Faculty, Management, Staff	50 hours
Develop, Administer, and Analyze Survey Data; hold focus groups	Faculty, Management, Staff	100 hours+ (SENSE/CCSSE, plus additional Surveys)
Adhoc Data Requests	Internal and External Individuals (ex. Faculty, Staff, and the Media)	550 (400 Staff + 100 Director)
Develop Additional Data Dashboards	Management driven, also a Strategic Planning Metric/Goal	350 hours
Training in Data Literacy and the Use of Data Related Technology (e.g., Power BI Training)	Faculty & Staff	60-100 hours

4. List each position in your unit, and briefly describe the responsibilities of each. Include part-time and work-study student hours.

Director of Institutional Research (Full time)

- Executes mandatory reporting including, but not limited to, IPEDS, state reporting, Voluntary Framework of Accountability, Carl Perkins, and grant data reporting.
- Supervises the coordination of the collection, analysis, validation and reporting of data, including the development of appropriate dashboards, data visualization, and other informational interpretations to support informed decision making both internally and externally to Rogue Community College (RCC).
- Performs advanced analysis as needed using statistical or programming languages such as SQL or R.
- Acts as the primary data steward at RCC, assuring the integrity of RCC's Student data, as data is both a strategic and financial asset to the college. Collaborates cross divisions with those who have primary oversight of different sets of data (data owners) to ensure data integrity.
- Supervises assigned staff.

Institutional Research Analyst: Strategic Planning and Student Success (19 Hours/Week)

- Fulfills ad-hoc and recurring data requests related to grant reporting and departmental, divisional, and strategic planning initiatives.
- Updates mandatory annual reports such as the Disproportionate Enrollment and Guided Pathways reports.
- Works with college stakeholders to use data to better inform their decision-making processes associated with strategic planning, student success, or other institutional initiatives. Provides support for the development of appropriate program goals and targets.
- Coordinates large-scale research projects, such as the administration of institution-wide student surveys (e.g., SENSE, CCSSE), focus groups, or projects using both quantitative and qualitative methodologies. Analyses data from institutional surveys and research projects.
- Provides support to other departments/programs/divisions in developing their own surveys. Produces narrative reports, PowerPoint presentations, and Power BI reports synthesizing research analysis and findings to support the college in building a culture of evidence.

Institutional Research Analyst: Reporting Coordinator (Full Time)

- Coordinates State and Federally mandated reporting overseen by IR, and develops and maintains documentation and records for same - working with affected departments to ensure data quality and business process efficiency wherever possible.
- Coordinates internal and external data requests made to IR and works to properly track and document those requests.
- Creates or supports the development of data reports &/or dashboards in SQL &/or Power BI in support of student/strategic success initiatives.

Institutional Research Assistant (Student worker position)

- Assists the department director and staff with general clerical duties, including data entry, basic data analysis and on-line grant research.

5. Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the College's mission?

Documentation. Critical to ever changing technology and assuring continuity of data projects (e.g., mandatory reporting, strategic planning, departmental planning), Institutional Research is under constant pressure to provide large volumes of data without providing ample time to document data projects appropriately. This documentation is important in maintaining consistent definitions, providing easy access to calculation transparency, and ensuring that critical information doesn't remain siloed with the staff member assigned the task. Critical information can be lost during staff turnover, which takes a year for the new staff person to acquire. It also allows for work to be transitioned between staff members, and thus cross training.

Time lost in acquiring the related information is a resource which could be better used to provide additional services to the institution, supporting the work of student success.

Needed Data Projects. There are a significant number of data projects which are needed to support internal decision making, which IR hasn't had time to do. Here are some examples:

1. Additional work on SENSE/CCSSE data, to get data and subsequent training about results in a timely manner. A better way of assessing student engagement goals on an annual basis as SENSE/CCSSE (Transition out of using the Interact Survey) are assessed once every 3 years.
2. Deeper analyses on Math Placement
3. Job outcomes of CTE concentrators who do not graduate
4. A higher quality look at transfer data, with a potential state level match rather than being limited to NSC. Collaborate with University IR staff to determine which classes transfer and which do not.
5. More focused analysis of the impact of prerequisites
6. A focused concentration on improving the accuracy of a student's major 1 to provide better data on program completion rates.
7. Develop data request form in Smart Sheet and transition.

Offering Additional Training in Data Literacy.

6. How could the College help your unit do its job better?

Data Governance. Data is both an informational and financial asset in higher education. Formalize a data governance structure, including the formation of a data governance committee to oversee the effective and efficient use of data—specifically focusing on formalizing processes, roles, policies and standards around the use of data. This structure need not be complicated or time consuming, but will provide consistency of practice regardless of staff turnover and give concrete definitions of boundaries as we transition into the new ERP. Build process and policies around data quality. Examine more efficient ways to improve data quality rather than relying on internal staff to make the corrections manually in the ERP. Include the governance of Survey's within this group to help reduce Survey fatigue amongst students, and thus improve survey response rates.

Stricter Informational Technology/Institutional Research Project Governance. We continue to have large ad Hoc data and technology projects which are prioritized without conversations with the appropriate management in charge of those areas which have significant impacts on other planned projects – many of which are required or mandated. This results in other important things not getting done, or both sets of projects while functional, miss key pieces which ensure long term management of the assets produced (either data related or IT project related). This costs additional time and money.

We also make significant software purchases without a proper business case (a form of IT governance), which would identify that we may have software which can be used for the same purpose. Even if the same purchasing decision is made, documentation is available if questions arise.

Ad Hoc Data Request Process. Improve in the quality of data requests, which often are missing vital information. Enable the ability to route high priority data requests to VPs or Deans to sign off on.

Additional Technology Training for Both IR and Staff College Wide. Technology is growing at a rapid rate. Given the high demand for IR time (as well as programmer time), training time vary rarely can be

included within the individual's work day. Training is often deprioritized, or in order for an individual to stay somewhat up to date, they must train in their off hours.

This has resulted in a culture at RCC where individuals maintain technological status quo, and avoid learning skills which would end up reducing not only their workloads—but the workload of others.

Examples of this include:

- Continuing reliance on old RogueNet Reports, when simple SQL skills or basic understanding of Microsoft Power BI could streamline processes.
- Lack of knowledge of Microsoft Flow, and what it processes it could improve. (IR/IT/Student Services)
- How to develop PowerApps to collect and report out important information (IR/IT/PowerUsers).
- Training in Power Platform Administration (IR/IT)
- Training in Power BI Administration (IR/IT)
- Training on MS's Embedded CRM
- Training on Smart Sheets.

7. In what ways does your unit relate to other units of the College, academic and nonacademic? For example, what services do you provide to other units? What services do other units provide to you? On what tasks do you collaborate with other offices?

The following Matrix documents the relationship between Institutional Research and other Divisions at Rogue Community College. Given the complexity of the services provided, only higher-level areas support is indicated.

Unit Relationship Matrix			
Division	Unit	Services Provided	Services Received
Student Affairs			
	Recruitment	Data support for departmental planning	
	Enrollment Services	Data support for departmental planning	Data correction of misreported fields
	Veterans	Grant Data Reporting Support	
	TRio	Grant Data Reporting Support	
	Accessibility and Disability Services	Data support for departmental planning	
	Marketing	Data support for Web site (e.g., RCC At-A-Glance)	IR Website Management
	Financial Aid	<ul style="list-style-type: none"> • Financial Aid Related IPEDS Reporting • Net Price Calculator 	

Unit Relationship Matrix			
Division	Unit	Services Provided	Services Received
	Student Engagement	<ul style="list-style-type: none"> • Provide Data Support to Student Engagement Team • Data support for student success grant 	
Academic Affairs			
	Teaching and Learning Center	Program and Departmental Planning Dashboard development and Maintenance *	
	Departments/Programs	<ul style="list-style-type: none"> • Data support for departmental planning • Grant reporting support 	
	Deans and Vice President of Academic Affairs	Data support, especially around grants like Guided Pathways	
	Curriculum	<ul style="list-style-type: none"> • Power BI and SQL Training* • Power BI Development • Advising on state and federal reporting policies 	Data integrity: Data correction related to courses and sections
Operations and Finance			
	IT Programming		Programming Support
	Network Services		Network and Power BI Admin Support
	Finance	<ul style="list-style-type: none"> • Power BI and SQL Training* • Data Support 	Analyst assistance for aspects of financial reporting in mandatory reports
People, Culture and Safety			
	HR	Data support for disproportionate hiring	Assistance in mandatory reports related to employees, like IPEDS & State Reports
	Diversity, Equity, and Inclusion	<ul style="list-style-type: none"> • Data support • Survey Support 	
Governance			
	President's Office	Data Support	
	RCC Foundation	Data support	
<i>* Services where collaboration is involved</i>			

8. What skillsets and resources does your unit possess that can be shared with other units at slack times?

In its current state, the Institutional Research Unit does not have any available 'slack time'. If it did, examples of skillsets and resources we could provide are as follows:

- SQL programming skillsets which could be shared with the IT Programming Unit
- Microsoft Ap Development, which could be shared across the college. MS Ap Development would allow for the collection of data, including things like 'time and effort' reporting associated with the STEP Grant.
- The creation of workflows in MS Flow. This would be enormously useful for Student Affairs, especially in streamlining the application process for students and reducing workload of recruitment staff—so they can focus more on recruiting students and less on assisting them with getting them past the placement process.

9. Which individuals in your unit are cross-trained, and in what areas?

Individuals in my office are cross trained to a certain degree both with each other's job duties as well as have been trained in basic SQL programming. This skill set could be applied across offices.

Over the last few years, the two analyst positions are somewhat specialized as they require different bodies of knowledge around the business uses of the data we calculate.

For example, the Institutional Research Analyst Reporting Coordinator needs to have knowledge Federal, State, and Grant Reporting requirements. These involve different analyses, definitions, calculations than what is typically focused upon for the Institutional Research Analyst focusing on Strategic Planning and Student Success. The reporting coordinator works more heavily with data validation in the system, to ensure data integrity for reporting. Thus, they have knowledge of policies and processes in both Curriculum and Instruction as well as the Register's Office. The Analyst focusing on strategic planning and student success has greater knowledge of student success metrics, and has a broader range of knowledge of data collection and analysis methods beyond what is contained in RCC's ERP.

That said, the long-range goal of IR is to have all critical reporting processes documented well enough that anyone with basic SQL skills could do the reports in an emergent situation. It should be noted that this does not replace a trained analyst's role. Data requires validation, as do report calculations. New codes are added, use of things change. Too many institutions assume automated reports without annual review are accurate, which results in problematic decisions and lost revenue.

10. What resources do you need to improve your services to a superior level?

1. Time to train on new technology, especially on MS Power Aps, or staff trained in implementation of Power Aps.
2. Additional time to enhance and update data dashboards, and improve on efficiency.
3. Closer partnership with the programmers to collaborate on learning the new system.

4. Time to perform additional analyses which would significantly impact decision making. Some of these projects are mentioned under question 5 of this document.

11. What technologies are available to you to provide your services better? What training do you need to be more effective users of the technology?

Both IR and IT need annual training on the technology we use. Annual training plans need to be developed more strategically, and assigned by management, rather than be limited to the time involved in performance appraisal. For IR, we need more training on the following:

Microsoft Power BI: This product has important monthly changes.

Microsoft Power Aps: This is a Microsoft product included in our Office 365 environment which is severely under-utilized. It's fairly easy to develop in, and can easily do what other products RCC has purchased do. Even more important, this product is already integrated with our environment—meaning that we can leverage it with other portions of our system more easily. With some time investment, it could easily do what Weave does. The problem is that because IR and IT do not receive any sort of consistent training related to products such as these, RCC does not know what these products are capable of.

12. What one thing do you wish you could do differently to improve your effectiveness but have not had the opportunity, time, or resources to do?

13. How do you review and evaluate your department's yearly performance?

For the last year and a half, Institutional Research has developed a *Culture of Evidence Plan* and assessed their performance based upon the completion of the associated tasks. The purpose of the culture of evidence plan is three-fold:

1. It provides evidence and documents Institutional Research activities designed to address three of NWCCU's recommendation from their April 2020 7-year site visit. While RCC will be reporting out on the activities during the mid-cycle review, they represent activities which should continue beyond the resolution of NWCCU's recommendations.
2. Serves as Unit/Departmental Planning and goal setting.
3. Serves as a Unit/Department Assessment tool regarding annual performance.

14. What support will your unit need to provide during the ERP implementation?

Institutional Research (IR) will need to provide significant support both during and after ERP implementation. Between August to the beginning of December of 2020, Institutional Research worked on 29 different data projects/requests related to the Campus Nexus implementation (roughly 7 requests per month). This was above and beyond IR's own workload related to the implementation where reporting code sets needed to be updated (which included reverse engineering the new data system in order to understand where important data was located). It was estimated that this reverse reengineering process took about 180-200 hours.

Using the experience gained with the Campus Nexus implementation, Institutional Research will experience an additional workload for 2-3 years, starting with implementation and extend at least 1 year

after “Go Live” dependent on where this date falls within the annual reporting cycle. Additionally, a mid-year implementation could result in additional workload if Institutional Research will be reporting out of two different systems for the same academic year.

The following table provides a rough breakdown and hours estimate for the impact of ERP implementation on IR workload.

ERP Implementation Institutional Research Transition Tasks		
ERP Implementation	Tasks	Hours Estimate
Year 1: Pre “Go Live”	Exploration/Backwards Engineering System	200+ Hours
	Potentially developing New ERP extracts to import into VESTA (* Dependent on ERP data warehouse)	~100 Hours*
	Power BI Dashboard Redevelopment	700 Hours
	Adhoc Data Requests to Support ERP Implementation	150 Hours
	Steering Committee Related Work (IR Director Position; .1 FTE)	184 Hours*
Year 2: “Go Live”	Continued Adhoc Data Requests to Support Post Implementation	150 Hours
	Recoding Mandatory Reporting Extracts (e.g., D4A, IPEDS)	350 Hours
	Recoding Student Success & Strategic Planning Metrics	350 Hours
	Potential additional Power BI development dependent on business process needs	~200 Hours*
* Very rough estimates		

It should be noted that all estimates, except the one for PowerBI Dashboard redevelopment (700 hours) are above and beyond current service level for the 2021-22 academic year. For the first year of ERP Implementation, IR will need an additional **530-580** additional hours beyond current service level. Post “Go Live” during the second year of implementation, IR anticipates needing **850+** hours to recode current code related to mandated activities and support any Adhoc requests specifically related to implementation.

Without an increase in staff hours, these activities will impact IR services for two academic years.

15. Explain how your unit could function with reductions

A reduction in staff hours would require either a loss in services to other units or increased the number of additional hours worked by the director to compensate for staff loss. Given additional workload estimates related to the transition to the new ERP reported above, additional staff cuts would only increase the deficit of available project time. It should be noted at that a 10 percent reduction in staff time is applied directly to an individual’s project hours (and not admin time), thus is equivalent to a 13.34% reduction in project capacity.

The following table reports project hours lost by staff (not director) time with each reduction.

IMPACT OF REDUCTION ON STAFF PROJECT TIME

REDUCTION	PROJECT HOURS*	SERVICES LOST AT CURRENT SERVICE LEVEL	INSTITUTIONAL RISK/IMPACT
No Reduction	350-400 **(ERP)	Scenario 1: Carrying out Activities on the Culture of Effectiveness Plan, which includes IR Unit assessment, and Planning (350.5 hours)	The COE addresses NWCCU Accreditation recommendations and Standards. Will impact resolution of recommendation findings year 3 visit, and impact 7-year visit.
		Scenario 2: Eliminate Internal/External adhoc data requests, minimizing new grant applications requiring data, and other new projects (442.8 Hours)	No new grant funds. This would require an institutional level support.
		Scenario 3: A mixture of both one and two.	<ul style="list-style-type: none"> • Would impact accreditation, as COE are also linked to strategic planning, and are minimal at best. IR annual assessment indicates a need to increase the number of activities not reduce them. • COE activities are also important in impacting data literacy at the college.
10 Percent	217.7+ ERP	Scenario 4: This would be a greater mixture of scenarios 1 and 2.	A greater impact, and greater risk related to accreditation.
20 Percent	435.4 + ERP	Scenario 5: This would fully eliminate both activities on the COE plan, as well as external data requests.	The combined impact of scenarios 1 and 2
30 Percent	653.1 + ERP	Scenario 6: All of the above, plus a significant impact to strategic planning work by staff (about a 50% reduction in services)	Combined impact of 1 and 2, with a greater risk to RCC accreditation.
<i>*(IR Staff Total Project Hours= 2,117)</i> <i>** Does not include Director's Steering Committee Time</i>			

The above table does not account for a 10% reduction in director time, as this adds a layer of complexity to the estimates as directors are contracted by the day with potentially variable workday lengths. The estimate of 10 hours work days for the capacity assessment was used as an average length of the day. In

order to understand the really impact of a 10%-30% cut on director time, this must be accounted by a 10% in days worked.

IMPACT OF REDUCTION ON PROJECT TIME FOR THE DIRECTOR POSITION		
REDUCTION	DAYS*	LOST PROJECT HOURS
10 Percent	25 days	187.5 Hours
20 Percent	49 days	375 Hours
30 Percent	74 days	562.5 Hours
* Total Contracted Days = 246		

While some of these hours could be made up with increasing to a 12-hour workday or longer, this isn't sustainable. Research shows significant health declines when individuals work 55 hours a week or more. This also could leave to job turnover in positions which would then increase institutional risk due to institutional knowledge loss and how long it can take a person hired into the position to come up to speed.

A 10% reduction in days would require an increase of an hour per remaining day to compensate for lost project time (11-hour work day). Lost project time would also have similar impacts to the above areas.

Nonpersonal Resources

The Institutional Research Unit's Nonpersonal resource budget is relatively small. Presently the two biggest expenditures are the need for new computers every 4 years, specialized software costs, and the Oregon Employment Department data match. While travel was included in this list, with COVID-19 the travel budget hasn't been used. It is anticipated that the need to travel may increase, though it is possible that the state group OCCIR (one of the main reasons for IR travel) may limit face-to-face meetings.

Shipping & Receiving/Auxiliary Services

1. What are the main objectives of your unit, and how do you measure success in achieving them?
The main objective of the shipping receiving department is to provide efficient and timely mail and courier services to the college

The main objective of Auxiliary services is to provide support to students and staff by managing the textbook partnership, marketplace payment options, grants, vending services, etc.

2. What services or activities in your unit are mandated, and what is the estimated time to perform these services or activities?

Auxiliary services – Oregon requires the provision of course material information at the time of registration for each term. There is also a requirement for courses that meet the criteria for low cost/no cost to be designated on the course schedule at the time of registration. Currently, the college course deadlines and our bookstore vendor adoption timelines do not align with these requirements. Collaboration with other departments is required to ensure compliance and takes approx. 8 hours of time per term.

3. What are the services that your unit provides and to which customers (students, faculty, staff, donors, others)?

Shipping/Receiving

Time required fluctuates daily with the volume of orders.

Students:

Mail/Receiving: intercampus delivery of tests; mailing of transcripts, diplomas, and relief gift cards; Online bookstore orders delivered to the library for student pick-up; shipment of commencement regalia for students that miss the online ordering.

Director: Coordination of no-cost/low-cost designations, bookstore financial aid, and deadlines. Involvement in textbook affordability group. Provision of supplies via vending machines and management of vending inventory.

Faculty and staff:

Mail/Receiving: shipping, tracking, and documenting deliveries and shipments; transportation and delivery of packages and mail to designated locations on each of the three campuses; Time-sensitive test materials and science equipment is also handled by the department to ensure timely delivery between campuses; Assignment and application of asset tags; Documentation and reporting to the Business Office for invoice payments. Delivers department bank deposits and change requests to the bank.

Director:

Management of bookstore partnership. Set-up of payment options difficult to offer in RogueNet, management of user, and reporting access. Collaboration to provide needed supplies in the vending machines. Management of inventory and reporting of revenue

4. List each position in your unit, and briefly describe the responsibilities of each including part-time and work-study student hours.

Mail/Receiving Lead: Receive in deliveries by verifying items against purchase orders; deliver items to appropriate department or campus. Notify vendors of discrepancies including damaged merchandise and shortages. Schedule pickup and deliveries as needed. Maintain/update accounts in Neopost machine Maintain/update staff information in shipping/receiving directory. Create end-of-

month reports for Neopost activity and Business Reply Mail. Enters receiving data into a computerized receiving system and coordinates paperwork with Purchasing and Accounts Payable. Work with Purchasing, Accounts Payable, and vendors to resolve any issues with items received and obtain information/documentation needed from PO originators to complete the receiving process (No Received list). Provides technical support and training to the Mail Receiving and Courier positions. Ensures the other Mail/Receiving employees understand and apply college policies and procedures consistently. Coordinate with receiving staff on the other two campuses to ensure timely delivery and routing of packages and support documentation. Assist Director in maintaining inventory levels for supply vending machines on main campuses

Courier & Receiving Specialist: Transports mail, packages, and materials between RCC campuses. Performs bookstore receiving functions, including properly accounting for, tracking, and documenting deliveries and merchandise. Performs appropriate follow-up for damages/defects and overages/shortages. Serves as backup for all shipping/receiving positions at all campus locations, as directed. Sort mail, and packages by campus and receiver and deliver to the appropriate location at each of the 3 campuses. Pick up deposits from applicable departments and maintain chain of custody by logging each exchange from department to courier to the bank. Assist Director in maintaining inventory levels for supply vending machines on 2 campuses

Director, Auxiliary Services & Shipping/Receiving:

- Mail Room - Provides supervision. Establish policies and procedures for the operation of mailrooms and courier functions. Manage, plan, organize and direct daily operations of mailrooms on three campuses and courier routes. Prepares, manages, and analyzes service area/department annual budgets, authorizes expenditures. Train staff, develop, and implement policies and procedures for operations of service areas as appropriate to provide maximum service to customers.
- Bookstore - Manages bookstore partnership and oversees contract with vendor and college in all aspects of providing course material information and student access to course materials. Manages partnership and oversees contract with vendor and college in all aspects of providing course material information and student access to course materials. Monitor and work toward compliance with Oregon legislation for textbook affordability within college and bookstore partner
Serve as administrator for user access and user role management for TouchNet Payment center site and provide training to users. Manage set-up and maintenance of system, merchants, stores, payment type, and report settings.
- Vending - Manage set-up and maintenance of system, merchants, stores, payment type, and report settings. Utilize inventory management software to track the location and use of inventory. Track movement of inventory from final bookstore inventory to Warehouse and then to Vending and/or marketplace using online software
- Commencement regalia - Provide the vendor with pertinent information for online sales. Provide Commencement, drop-ship locations and addresses, and start/end dates. Choice of product to be offered and retail pricing. Coordinate with Student Affairs and Marketing to provide website links and communication to students

5. Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the college's mission?
Faculty and students have demands in regard to textbook affordability. This relates to the college's mission of accessible opportunities for student success.
6. How could the college help your unit do its job better?
Plan ahead. Complete Purchase Order authorization process prior to delivery. Provide documentation or receipts in a timely manner. Provide location and room number in the 'deliver to' field on PO.
Submit textbook adoptions prior to the deadline. Provide tracking that each instructor has confirmed that their course materials are listed correctly on the bookstore website. Align course schedule and instructor changes with adoption deadlines.
7. In what ways does your unit relate to other units of the college, academic and nonacademic? For example, what services do you provide to other units? What services do other units provide to you? In what tasks do you collaborate with other offices?
 - The Business Office requires timely and accurate receiving of deliveries to pay invoices. End of Month reporting of mail transactions is also provided to the Business Office.
 - Coordination of delivery times for the science department is used to ensure the preservation of environmentally-sensitive materials.
 - The library serves as a delivery point for student bookstore orders sent to the campuses.
 - Facilities and security admit deliveries to the mailroom before/after mailroom workday hours. They also assist in the unloading of large/heavy items that need a forklift or multiple people and sometimes transport items that do not fit in the courier van
8. What skillsets and resources does your unit possess that can be shared with other units at slack Times?
Mailroom lead – forklift certified
Director – Knowledge of AR, RAPS, Shipping/Receiving, and other RogueNet apps. Use of Microsoft applications, SmartSheet, and beginner knowledge of program assessment processes.
9. Which individuals in your unit are cross-trained and in what areas?
Each Shipping/Receiving staff member is cross-trained to perform the duties of the other positions and serves as a backup to cover absences when needed.
No one has been cross-trained to manage the bookstore contract, manage TouchNet payments, programming of vending machines, or use of inventory software for tracking vending inventory.
10. What resources do you need to improve your services to a superior level?
One system, rather than multiple systems, for asset tag assignment and tracking of the movement of assets and tracking of packages from mailroom receipt to end-users
11. What technologies are available to you to provide your services better? What training do you need to be more effective users of the technology?
RogueNet apps, TouchNet, Simplifi (vending), ClearInventory for inventory tracking.
Training in the new ERP, once available, in the shipping and receiving modules
12. What is one thing do you wish you could do differently to improve your effectiveness but have not had the opportunity, time or resources to do?

Re-organize remaining bookstore inventory to better utilize it for vending supplies. Currently it is packed from each store rather than by item and is difficult to find the complete total quantity of any given item.

13. How do you review and evaluate your department yearly performance?

Staff evaluations and discussion with staff members. Feedback from staff

14. What support will your unit need to provide during the ERP implementation?

Mailroom staff: Input on needs and functions as well as training in shipping/receiving modules. It may be beneficial to sit in on training for purchasing and AP to gain knowledge of how their work affects the processes in those areas.

Director: Training in Shipping/Receiving, AP, AR, and purchasing modules

15. Explain how your unit could function with

- A 10 percent reduction in staff

Mailroom: A 10 percent reduction would have minimal effect on services if spread out throughout the week.

Director: reduction would have minimal effect once the COVID grants are no longer available

- A 20 percent reduction in staff – Reduction of services

Mailroom:

- Services would have to be reduced/modified to limit the courier mail runs either to a 4-day work week or a daily reduction.
- Staff on each campus would need to better plan for delays in mail and package deliveries by ordering in a timelier manner and making sure mail was in the outgoing bin prior to pick up on the day prior to when no mail services are available.
- Daily reduction -the courier route would be shortened and some services decreased. For example, departments may be required to pick up packages during a specific daily window rather than have them delivered at TRC and RVC. Mail locations may need to be consolidated more than they are. Local vendor orders, such as Nice Badge, may need to be shipped rather than picked up by the courier.

Director:

Some duties would have to be reassigned to other areas. Textbook adoption duties have already been reassigned to Instructional. A reduction may require the bookstore contract management, student communication/inquiries, account user management, and invoice procedures to be reassigned as well. This may also require another department to cover lunches, breaks, mail runs, and absences of the mailroom staff. The director currently accepts mail and deliveries at RWC while the remaining staff member performs the courier and receiving duties at all three campuses.

- A 30 percent reduction in staff - Large reduction of services. Increased instances of misplaced mail/packages and more difficulty tracking them down. Increased need for coverage and duties to be performed by other departments.

Mailroom: Daily courier routes and the number of mail runs on each campus would need to be reduced to limited days rather than daily deliveries to accommodate the reduction. Vending machine duties and any duties not directly related to shipping/receiving and mailroom would need to be reassigned. Departments would need to be responsible for their own bank deposits. Pick-ups from vendors would not be feasible. Would require the acceptance of deliveries from staff members from other departments and would lead to more misplaced and unaccounted

packages and make it more difficult to resolve those issues. This would also take staff away from their own duties. There would be an increased need for departments and staffs to plan ahead especially with time-sensitive materials like tests and orders that require refrigeration, etc., or for the department to transport themselves.

Any reduction in staff time would make it difficult to accommodate absences without the help of other departments. It is currently difficult to cover the main mailroom and provide the courier services in the event of a vacation, illness, etc. especially in the absence of the director who currently accepts mail and deliveries at RWC while the remaining staff member performs the courier and receiving duties at all three campuses.

Director: Supervision and/or job duties would need to be reassigned to other departments. Auxiliary services has only this position to provide services and perform job duties. Someone outside of the department would have to be cross-trained to perform duties in the Directors absence and outside of the director's daily schedule.

- A 20 percent reduction in nonpersonnel resources
- A 30 percent reduction in nonpersonnel resources
- A 10 percent reduction in nonpersonnel resources

This would be the only feasible reduction as the budget is very limited and covers just the current fees and costs. A reduction in the equipment over \$5000 is a possibility in some fiscal years but the costs do occur occasionally.

What would be the consequences of other effects on service delivery in each case? [Minimal](#)