I. Description of Administrative Responsibilities

   i. campus cashiering  
   ii. fee structure and related accounting data  
   iii. student identification system  
   iv. third party billing  
   v. student account collections and debt management 
   vi. student refunds  
   vii. counseling to students and parents 
   viii. preparing and maintaining departmental budget 
   ix. Supervising four full-time employees 

II. Administrative philosophy, objectives, and strategies for achieving them. 

   The Bursar’s Office strives to accommodate and serve our students, faculty,  
   and staff through accuracy, reliability and friendliness thereby creating an  
   atmosphere of harmony and trust that spreads to the people we serve. We  
   propose to achieve these objectives by acquiring additional training in  
   customer service, cross training and establishing effective communication  
   with our students and other departments at the university. We will also  
   periodically review and modify policies and procedures to ensure that all  
   processes are focused on the student. 

III. Departmental Goals for 2002-2004 and progress toward achieving them. 

   i. Research, organize, and plan for the implementation of a one-card system: A  
      consultant, Mr. Robert Huber, was hired to facilitate the research and  
      implementation of a one-card system. The task force was formed, and teams were  
      organized to gather information for the preparation of a needs assessment. The  
      needs assessment is being compiled by Mr. Huber. 

   ii. Enhance the quality of relationships with other departments and students to  
       promote customer service and improve the image of the Bursar’s Office: The  
       Bursar’s Office is now selling and collecting funds for parking decals and  
       collecting and receipting the payment of parking fines. This assisted the Police  
       Department in a problem with cash security. We also worked with the Library  
       when there was cash disappearing from their copiers. We assisted Student Health  
       Services by creating a cash deposit form to enable them to make timely deposits.  
       Student identification cards and parking decals were distributed during summer  
       orientations to help eliminate the lines typically experienced the first week of  
       school. We also mailed refund checks to eliminate lines, eliminated lines for loan
checks now electronically posted to the student’s account. We encourage the use of Pipeline to students when speaking to students on the phone and during summer orientation.

iii. **Automated Child Care payments in Banner:** We have upgraded the receipting of child care payments from a manual process to an automated process. This automated system helps in the accuracy of recording and maintaining account balances.

IV. **Innovations or Improvements and impact on your area of responsibility**

i. Cross trained – I crossed trained with each staff member for 2 weeks so that I could be able to assist if one of them was out or as needed.

ii. Scheduled window times- Each employee has a scheduled time to work the window to ensure that customers are served timely. This reduces the wait time because no one has to wait to see who will serve the customer.

iii. Purging Students for non-payment- This eliminated keeping student’s account active and they were not in school. This reduces the number of students being turned over to collections.

V. **Departmental Goals for 2004-2005**

VI. **Institutional Goals**

VII. **Performance Measures**

VIII. **Additional Resources Needed**

**Goal #1** - Assist students to better afford their education by offering them a more flexible payment plan than the 3 pay plan that the university has been offering them in the past. I am researching companies that we can partner with to offer payment plans to our students.

Institutional Goal – Catalyzing partnerships that bring benefits to the region.

Performance Measures – There is an increase in the number of students enrolled in a payment plan and there are fewer students who have balances at the end of the term.

Additional Resources Needed - cooperation and support of the ITS staff to ensure that there is an interface between Banner and the provider's system to electronically post payments to the proper account.

**Goal #2** - Ensure a smooth transition in phasing the one-card system into full operation into the Bursar's Office.

Institutional Goal- Introducing the latest in knowledge and technology to the region.

Performance Measurement- Get students to complete a survey on the benefit and/or likes and dislikes of the one-card and what they would like to see happen with the one-card.
Additional Resources- Another computer or upgrade to Windows XP to handle some transactions that are needed to process information for the one-card.

Additional Staff person – A receptionist or secretary is needed to handle the increase flow of traffic that the one-card will bring into our office and needs or services that the one-card provides: payroll deduction, community user, gold & gold plus members, etc.

Larger Safe – The amount of money that is collected in the office will increase and the current safe is not sufficient to hold all the cash received from the various sources.

**Goal #3 - On-line payments**

Institutional Goals - Introducing the latest in knowledge and technology to the region.

Performance Measurements- the number of students/parents that use the services can be calculated monthly.

Additional Resources Needed: No additional resource is needed to implement on-line payments.

**Goal #4 -** To redirect the issuance of decals to the Bursar’s Office while improving the efficiency of registration. This can be done by incorporating the cost of decals into tuition.

Institutional Goals – Creating programs specific to individuals and communities in the region.

Additional Resources – No additional resource is needed to facilitate this goal.

Performance Measurement – This will curtail the number of students standing in lines to purchase decals.

IX. **Personal career goals**

i. Obtain an accounting degree

ii. Become a certified internal auditor