MISSION STATEMENT

The Bursar’s Office shares the mission of the University of South Carolina by providing financial services support to students, parents, faculty, staff, deans, department heads and the administration. The office functions primarily as the official depository of all university funds. The office is responsible for receipting, disbursing and safeguarding of all funds, which include the fair assessment and collection of proper academic fees as authorized and approved by the University Board of Trustees. The mission includes the allocation of special fees, collection of accounts receivable, processing the transfer of electronic funds, disbursement and collection of all student loans, travel advances, payroll advances, and promissory notes. The Bursar’s Office also supports the mission of all system campuses by providing and maintaining automated accounting systems that includes development of new systems, training, technical support and guidance in the interpretation of university policies and procedures.

PURPOSE:

The Office of the Bursar plays a key role in identifying and developing solutions for effectively meeting challenges and opportunities facing the university. Our purpose is to provide outstanding customer service to effectively support the mission of the university while meeting all legitimate accountability demands by our internal and external constituencies.

STRATEGIC GOALS AND ACCOMPLISHMENTS IN THE STRATEGIC PLAN FOR 1999-2000

The Bursar’s Office continues to explore uses for existing and new technologies that can better service the university community. We are achieving our goals by acquiring state-of-the-art equipment and software. We strive to provide outstanding customer service by quality principles in pursuit of excellence. We continue our efforts to train and prepare our staff to ensure that they have the necessary skills to administer these new technologies.
Governmental mandates, such as the Taxpayer Tax Relief Act of 1997 (TRA97) and Title IV Refunds, require the university to have a new reporting system that continues to tax our limited resources. We have met our goal in preparing a reporting system for the Taxpayer Relief Act of 1997 which provides for new updates as the law requires. The 1098-T forms are processed and mailed, as required by the law, for all students in the University System.

We continue to work with our campuses in implementing and making the student accounts system available to all university campuses. The university continues to use the electronic transfer of funds (EFT) to receive financial aid awards. Electronic checking is also available for immediate crediting of a student’s aid to their checking accounts and debiting the same account for tuition, fees and other charges owed the university. The university has developed e-commerce applications and now accepts student payments over the web. Credit card payments are available to all students to pay their fees via the Visual Information Processing (VIP) and the Telephone Information Processing System (TIPS).

The Residency Office has begun the use of imaging hardware and software to store and retrieve their documents electronically. An incremental approach will be used to install this system in other departments in the Bursar’s Office over the next five years. The Bursars Offices shares the imaging system with the Registrar and Graduate School.

Our marketing approach to educate our students on services we provide are orientation sessions, inserts in student billing, the Bursar’s Web page, and the Master Schedule of Classes. This approach to educate and encourage our students to use the services, which are provided by the Bursars Office, is continually updated and improved as we continue to expand our E-commerce applications.
STRATEGIC PLAN:

Our primary goal is to protect the financial integrity of the university, safeguard its assets, effectively serve the need of the university, and ensure the most efficient use of university resources and compliance with regulatory authorities.

We are working effectively with the university staff and students to achieve the accountability expected of all of us. We continually monitor the regulatory environment in order to anticipate new requirements. We strive to provide timely announcements, distribute appropriate policies and procedures, and educate all students and staff of new procedures.

GOALS

GOAL 1: Continue to improve accurate and timely dissemination of financial information. Continue to work with Computer Services to improve financial reports. Identify financial analysis reports needed to make informed decisions. Continue to develop in-house software to perform daily tasks. Continue the process of developing programs that assist in the daily balancing of credit card processing and academic fee distribution.

Assessment Plan:

Assessment will be the feedback from the recipients of the reports and the evaluations of workload reductions in the Bursar’s office.

Goal 2: E-commerce is no longer a question of whether, but how. We must change our business models and move beyond our traditional roles of managing internal systems with a clear focus on service to our students and staff. We must experience e-solutions if we are to keep our operational costs at a reasonable level. A continued effort is being made to expand the e-commerce processes to take advantage of the reach and speed of the Web. We will continue to build e-commerce applications to serve our students better. E-commerce applications are the answer in communicating with our students and to allow processes which benefit both the student and the university.
E-commerce objectives:

Parking Decals: Our goal is to develop a Web-based system for the registration of cars and the distribution of parking decals using the Student Fee Payment System technology which has been developed and proven successful. Students who use the Web can avoid long lines during registration to purchase parking decals. The elimination of manual data entry will free up time for permanent staff and part-time workers during this very busy period. The Bursar's office is working with Parking Services and Computer Services Division to develop this business solution.

Housing Room Deposits: Our e-commerce objective in this area is to make available the Web for our students to make their required room deposit payments.

Registrar's Office Transcripts Requests: Our e-commerce objective in this area is to make available the Web for our students to pay their transcript fee when requesting a transcript.

Graduate and Undergraduate Admissions Application Fee: Our e-commerce objective in this area is to make available the Web for our students to pay their admissions application fee.

Continuing/Distance Education: Our e-commerce objective in this area is to make available the Web for our students to pay their fees for short courses, correspondence courses, and purchase their required textbooks.

Alumni Membership Applications and Donations: Our e-commerce objective in this area is to make available the Web for our alumni to pay their alumni fees and make donations.

The Bursar's web page will continue to be upgraded and improved to include new services as they are developed.

E-commerce initiatives are complex and will require continued expertise and service from USC's Computer Services Division. We must continue to expand our knowledge and implement e-commerce applications to all feasible business processes. Our e-commerce capabilities must be scalable to provide for demands that will be made on it throughout the academic year. Computer Services Division provides excellent service in the development and execution of our goals.

Assessment Plan:
E-commerce is evaluated by the department as to efficiency and by
the client as to user friendliness.

**GOAL 3:**

Provide a safe, healthful, accessible, efficient and appealing working
environment. Our students are shuffled from building to building for
administrative services. Efforts must be made to provide improved
serviceable quarters for the Bursars Office, Registrar, and Financial
Aid in a one-stop-shop, “mall,” environment for students. Every effort
will be made to take advantage of the anticipated move of the Bursar’s
Office to new quarters to provide for the mall environment concept.

**Assessment Plan:**

This plan depends upon the future plans for the use of Petigru and
future development plans of the campus.

**GOAL 4:** Develop a refund system which will meet the federal regulatory re-
quirements of the Title IV refunds. The new refund system must be in
place prior to the fall 2000 semester. Our goal is to streamline the re-
fund process and reduce the number of manual processes involved to
provide faster refunds to our students.

Several months of design work, programming, and system testing will
be required to install a new refund system. The timeline has been
mandated by the new Title IV regulations regarding refunds. The re-
quired resources must be allocated to this project. We have requested
that Computer Services Division move this project up to the top of the
priority list.

**Assessment Plan:**

A working system should be in place before the opening of the fall
2000 semester.
GOAL 5: Continue our incremental approach to installing imaging hardware and software in other applications. An electronic filing and optical storage application will increase office efficiency and serve as a cost-effective method of storing, managing and retrieving needed documents.

Assessment Plan:

We will monitor the volume of documents recorded and our user evaluations. The storage space requirements by the Bursar’s office should be reduced.

GOAL 6: Continue to visit with our campuses and offer assistance as needed. The installation of the Student Accounts Systems has been scheduled for the Union and Salkehatchie campuses. This project was stalled in the past due to the Year 2000 project. We will work closely with Computer Services to implement this system as efficiently and effectively as possible.

Assessment Plan:

A review with each campus after the system is installed.

GOAL 7: The Bursar’s Office has undergone a complete transformation in the past six years. This transformation would not have been possible without the hard work and dedication of the staff. Many of the duties and workflow processes have been restructured in the areas affected. With the increasing emphasis being placed on embracing new technologies, there will be casualties resulting from our entry on the information highway. Some of the staff is performing at their mental and physical limits. Because of their acquisition of required skills to do their current jobs, many staff members find these skills in demand in the open market, which includes other departments within the university. Our progress toward the goal and mission of the Bursar’s Office has created a dilemma where staff members are requesting and expecting recognition and compensation for their efforts in contributing to our success. Most of our budget is for salaries, and any new funds to give raises must come from other revenue sources.

Our current classification level does not conform to market salaries. The staffing in this office has been transformed from a basically clerical routine operation to a highly technical computer driven operation. Future staffing needs require that new staff have the needed skills when they arrive on the job. The market will dictate a salary commensurate with the skill requirements.
The University continues to expand the number of programs and services available to students. However, the number of staff members in Financial Services that handle the critical program needs and facilitate the services remains static, which increases the number of demands placed upon our employees which further strains their limited time resources within each given term.

**Assessment Plan:**

Staff performance reviews will be compared with past performances for measurements of improvements.

**GOAL 8: Marketing Our Services:**

The number of students who have provided the authorization necessary to debit and credit personal bank accounts electronically during the first two years of operation has increased to over 5,000. However, approximately 4,000 students request personal attention with their financial problems prior to the beginning of each semester. We will continue to educate the students on the various methods of payment to increase their level of participation. Students who need personal attention will be continuously monitored.

**Assessment Plan:**

A log will be maintained on the number of students who have accepted the electronic debit and credit plan. A critique will be held at the end of each registration period to document problems and suggestions.

**GOAL 9: **Continue to monitor necessary changes from the Department of the Treasury affecting the Taxpayers Relief Act of 1997. This service is performed for all campuses. We must diligently watch for instructions from the Department of the Treasury clarifying the reporting requirements. The continued support from Computer Services is necessary to develop and implement changes as mandated by the Department of Treasury.

**Assessment Plan:**

A log will be maintained on all calls, e-mail and inquires with any concerns and questions with the Taxpayers Relief Act of 1997.
PERFORMANCE AND ASSESSMENT MEASUREMENTS:

Performance and assessment measurements will be determined from feedback from the users and/or customers impacted by our core processes. These measurements will be reflected in assessments at the end of each period of service. The period of service is daily business, semester start and stop and annual reports.

We will review and implement best practices at other universities. Benchmark other universities of like size and mission with regard to organizational structure as part of the program review. Efforts will be made to identify areas where trend information needs to be studied and maintained.

Our goal is to have fewer exceptions to compliance issues and acceptable audit reports with no major findings (when conducted). Performance is measured with no fines or penalties for regulatory violations.

REQUIREMENTS

The resource requirements to carry out the goals of the Bursar’s Office are staffing, system design, programming, software and hardware acquisitions. Adequate funding support is required if our goals are to be reached. The budget for the Bursar’s office has not had an increase for the past nine- (9) years while new systems processes have been added and salary, supplies and equipment costs increased.