

Lawson State
COMMUNITY COLLEGE

Unit Plan Annual Narrative

Directions: Use the "Unit Plan Narrative Guide Sheet" to complete this planning form. Be sure that under each section, you write a narrative which discusses all elements listed under each heading. If a particular element does not apply to your area, note that within your narrative. Again, this form should be completed as a narrative, not bulleted.

Department/Unit: Financial Services

Unit Administrator: Craig D. Lawrence Date: June 19, 2008

A. Unit Description

- a. Connection of the unit to the institution's role and mission:
- b. Unit Achievements:
- c. Instructional Units within your division:

(a) The Lawson State Community College Financial Services utilize the Bookstores, Cafeterias, Mailrooms/Reproduction Centers, and Vending Services, to do be of service to students. To look specifically at the Bookstores, the unit provides books and supplies, which advance the accessibility of these and other tools for quality educational opportunities. The promotion of economic growth through workforce development is enhanced by our sales of trade books and related tools—some computerized-- in booming industries such as health services, air conditioning and refrigeration, auto mechanics, electronics and computer technologies.

(b) As to Unit Achievements, we note the following-- Bookstore: The combined bookstore branches performed better than budgeted: the Gross Margin is higher this fiscal year (netting 24.83 percent FY 9-30-07).

The Inventory audits received a 97-98% score on accuracy of counts during Examiner samplings – September 30, 2007 yearend inventory--for both Birmingham and Bessemer branches of the Lawson State Bookstore.

(c) There are not instructional units within our division.

B. Unit Effectiveness

- a. Staff Description:
- b. Instructional Effectiveness / Student Success:
- c. Support Services Connection & Resource Availability:
- d. Customer Service Ranking:

- (a) As to staff description in our unit, there are two bookstore branch managers, two bookstore clerks, one Food Services manager, circa seven Food Service employees, four employees in the Reproduction Centers/ Mailrooms.
- (b) As auxiliary educational support, since we do not formally instruct, but rather we facilitate instruction, we do not measure instructional effectiveness nor student success, as such, though we are in the process of articulating Student Learning Outcomes (SLOs). We have first-hand exposure to students' abilities to carry out business exchanges and trading in a professional, informed and courteous, effective manner.
- (c) As to Support Services Connection, Financial Services provides books, supplies, food, drink and snacks, and facilitates entrance to athletic events for students.
- (d) In reference to Customer Service Ranking, to illustrate, In June 2008, the Director heard a strong compliment at a statewide AEA function, in which the individual was extravagant in her praise of the Bessemer Bookstore for providing such good customer service for this individual's nephew, who had been transplanted from the Gulf Area in the wake of the Katrina natural disaster. In addition, we are well on our way towards the development of a survey instrument for the Food Services and the Bookstores that will further instruct us as to be of most help to the student customers. Previously, in our Suggestions box in the Bessemer Cafeteria, we received excellent complements by a ratio of 9 to1 to negative notes.

C. Value Added

- a. Support of the unit to other program and units:
- b. Strengths:
- c. Areas Needing Improvement:
- d. Departmental or Unit Needs:
- e. Recommendations:

(a) In reference to support of the unit to other program and units, our Bookstore branches in Birmingham and Bessemer facilitate book and supply ordering for all instructional departments.

(b) As to strengths, our staff have worked hard to be very flexible—for example, say, in getting to the Birmingham campus books for courses taught by instructors based on the Bessemer branch (and thus who may have ordered from the Bessemer store). Another long-standing and oft-forgotten strength is to facilitate the school-wide buying of supplies (in addition to books) in bulk for instruction.

Every semester prior to the Registration Rush, we compare the price of every ISBN in one Bookstore branch with every ISBN in the other Bookstore branch. This has been developed strongly this fiscal year.

(c) As to areas needing improvement, we are attempting to make it easier for instructional areas to be able to reference the books that we have on our shelves in order to provide the information necessary to new book ordering—to do so, we want to further automate our perpetual inventory system, including the increased bundling that the industry has moved to. To that end, we are inventorying our books more frequently mid-year and mid-semester.

(d) As to department or unit needs, we would like faster point-of-sale software that would make sales processing much quicker for student customers. Even as we are working to most fully utilize the Access software for Bookstore transactions, we continue to study industry-standard Point-of-Sale software for bookstores for planning and forward-thinking, proactive purposes; we realize that future software needs to incorporate the needs of all of the College divisions. Last year, we mentioned the strong need for more floor space in the Birmingham branch. This year, with Vice President Sharon Crews at the helm, Kenneth Gulley, Birmingham Bookstore Manager and others, together with the Director of Financial Services, have together facilitated the opening of the new, much larger Bookstore on the second floor of the Student Services Building on the Birmingham campus.

C. Value Added

- a. Support of the unit to other program and units:
- b. Strengths:
- c. Areas Needing Improvement:
- d. Departmental or Unit Needs:
- e. Recommendations:

(e) As to recommendations, these have been given above, along with needs listed.

D. Projections

- a. Staff needs:
- b. Resources needs:
- c. Professional development needs:
- d. Other (if applicable):

(a) Our employees are doing a very good job. For a part of the year, on the Birmingham campus, only two members were available, due to the termination of one employee; this problem has been largely temporarily ameliorated by the addition of one short-term worker.

(b) In reference to resources needs, in the Bookstores, quicker, more current windows-based bookstore industry-based Point-of-Sales software is needed; this is not only for keeping the lines down during the Rush/Registration periods, but in encouraging sales by being able to provide more timely refunds to students when courses do not make. When students have to wait several weeks for refunds, many involuntarily, they may permanently take their business to other College stores in the area, on line, etc. As to Food Services, repairs to a walk-in cooler are needed in the Bessemer cafeteria. Even more pressing now is a superior **second deep fryer** for Bessemer, with the strong demand/ volume required and dependence upon fried food selections.

(c) Regarding professional development needs, bookstore and cafeteria managers need to be able to attend statewide industry meetings. **Required and discussed vision statements regarding the application of what was learned are prepared subsequent to the conferences** and these concepts shared and worked, specifically between both Bookstore managers and the Director of Financial Services. Copies of the same have been tendered to Vice President Sharon Crews.

(d) Major needs have been listed above.

Institutional Effectiveness Unit Plan (Phase I for 2007-2008)

Directions: Use 9 point font when completing this form. First, complete columns A-D. Make sure your Unit Outcomes are targeted, essential and measurable. Columns E & F (which serve to assess whether your goals were reached and how you intend to use the results) will *not* be completed until the end of the cycle in the spring.

Unit: Auxiliaries

Unit Administrator: Mr. Craig D. Lawrence

Unit's Mission: To provide books and supplies, food and vending services, and reproductive/copying services effectively and efficiently to our customers—students, faculty, staff, administrators and outside customers—in a way that adds to rather than subtracts from other resources that can be used for teaching and learning.

| Number each Outcome in each column | A. Unit Outcomes (3-5) | B. Outcomes Link to Institutional Goals & Strategic Indicators | C. Methods of Assessing the Outcome | D. Budget Implications |
|---|---|--|---|---|
| | <p>Should be measurable. Use percentages where possible. <u>Be brief.</u></p> <p>1. Gross Margin (College-wide) will increase in the Bookstore by 2.5% in the year 2007-2008 over 2006-2007. The baseline data (2006-2007) is \$411,014.16 for combined campuses, Birmingham Bookstore (2006-2007): \$335,229.53; Bessemer Bookstore (2006-2007) \$75,784.63.</p> <p>2. Gross Margin (College-wide) will stay even in the Café, both campuses. Baseline data: Birmingham Café (2006-2007):\$30,584.79; Bessemer Café (2006-2007): \$14,667.</p> <p>3. Athletic gate will increase by 1.0 % during 2007-2008 over 2006-2007 (\$4,059.46)</p> <p>4. Machine vending will increase by 2.5% during 2007-2008 over 2006-2007 (\$23,066.12).</p> <p>5. Ninety percent of students will indicate overall satisfaction with customer service/</p> | <p>List the goal numbers and the corresponding Strategic Indicator letters (i.e., Goal 1; Indicators B & C; Goal 2; Indicators A-C, etc.)</p> <p>1. Goal 3: Indicators A,B & C</p> <p>2. Goal 3: Indicators A,B & C</p> <p>3. Goal 3: Indicators A,B & C</p> <p>4. Goal 3: Indicators A,B & C</p> <p>5. Goal 3: Indicators A,B & C</p> | <p>List what methods you plan on using to measure each outcome (i.e., exit exam results, portfolios, surveys, board exams, etc.)</p> <p>1. General ledger annual revenues for the Bookstore.</p> <p>2. General ledger revenues for The Café—both campuses.</p> <p>3. General ledger revenues for athletic receipts</p> <p>4. General ledger revenues for Vending—both campuses (a) General Ledger (b) External (Buffalo Rock) Commission Reports</p> <p>5. (a)Annual (Dec. 2007) Student Perception Surveys for SACS (b) July 2008 in-class surveys</p> | <p>If your outcome has budget implications (costs that will exceed \$499), list them here.</p> <p>1. None.</p> <p>2. None.</p> <p>3. None.</p> <p>4. None.</p> <p>5. None</p> |

Unit Plan-Part II: Directions: As noted on page one of this plan, complete columns E & F at the end of the planning cycle in the spring. As you report under each column, be sure to carry over the numbers which represent each outcome you are addressing.

E. Actual Results Obtained—When you assessed and measured your stated outcomes, what results did you find? Be clear and concise in your reporting.

1. A. BOOKSTORE-BIRMINGHAM BRANCH:

Birmingham: The positive net difference between revenue inflows and purchase outlays for the six months ending March 31, 2008 were \$106,639.10, or 27.45%, an improvement over the positive net difference (gross profit margin) between revenues and purchase outlays for the prior comparable period, or six months ended March 31, 2007, which was only \$79,891.53, or 19.36%. In other words, the gross margin profit percentage **grew by 8.09%** for the first six months of the current year over the same period last year. As for details, during the first six months ending March 31, 2008, total sales were \$388,525.72 versus \$407,581.68 for the six months ending March 31, 2007, a drop of 4.68%. However, purchase outlays for the six months ending March 31, 2008 fell even more markedly: \$281,886.62 versus \$328,690.15, very positive drop of 14.24%. Documentation in the form of sales and purchase figures from the Lawson State Community College General Ledger are provided in the Planning Hearing Notebook.

1. B. BOOKSTORE-BESSEMER BRANCH:

At Bessemer, the Gross Profit Margin for the first six months ended March 31, 2008 was 12.34 %, which was \$36,440.16, which was down from the \$46,751.89 that was earned for the first six months ended March 31, 2007 (for comparison purposes).

2. FOOD SERVICES - BIRMINGHAM CAMPUS:

While the gross profit margin for the seven months ended April 30, 2008 was \$2,332.23, or 1.94 %, the gross profit margin between revenue inflows and food purchase outlays for FY 9-30-07 was \$30,584.78, or a gross profit margin percentage of 16.51%. By comparison, for the seven months ended April 30, 2007 (reported last year), there was only an 8.7% gross profit percentage. For FY 09-30-96, there was a gross loss of \$1,552.20. The above values present progress.

FOOD SERVICES - BESSEMER CAMPUS:

There has been a 1.07 percent increase, *which is better than the goal of staying even* for the gross profit margin (GPM) for the seven months ended April 30, 2008 was \$8,384.83 or 37.74%. The positive net difference between revenue inflows and food purchase outlays for FY 9-30-07 was \$14,667.00, or a gross profit percentage of 37.34%. By comparison, for the seven months ended April 30, 2007 (reported last year), there was a similar 40% gross profit percentage; *yet* for FY 09-30-06, the gross profit margin was only 12.39%, or \$4,224.05.

3. GATE RECEIPTS

Gate receipts fell by 8.4 percent, rather than reaching the goal of 1.0 percent increase. The gross gate sports receipts, currently for basketball, using internal reporting, for the seven months ended April 30, 2008 was \$3,275.00. The gross profit margin for the seven months ended April 30, 2007 was \$3,574.36.

4. VENDING-BIRMINGHAM

Gross profit margin was up by 31.42 percent over last year for the identical period. Birmingham vending commissions total \$14,379.59 for the six months ended March 31, 2008, or an average of \$2,396.60 per month (i.e. increase of 31.42%). To be more specific, for the same period last year, monthly sales commissions averaged only \$1,823.60 per month.

VENDING-BESSEMER

Bessemer vending commissions, already calculated in a format identical to gross profit margin (GPM) showed a 2 percent decrease versus the goal of 3.5 percent increase. Specifically, the total \$6,814.56 for the six months ended March 31, 2008, averaging \$1,135.76 commission revenues per month. This is similar to the \$1,159.30 per month averaged for the same period last year.

5. STUDENT SATISFACTION SURVEYS

On the Lawson State Community College Student Perception Survey for SACS Merged College Survey as of December 2007, 97.1 percent of the 219 students queried indicate excellent to good to adequate satisfaction with the Bookstore. Thirty-eight percent responded "Excellent," 40.3 percent responded "Good," and 18.1 percent responded "Adequate." The Not Applicable category was only 0.4 of one percent, so this was disregarded.

Regarding the Food Services/Cafeteria(s), after the removal of the "Not Applicable" outliers category (34 of the 226 students), 91.76 percent of those surveyed expressed excellent to good to adequate satisfaction. 37.8 percent of the total of 192 students (excluding Not Applicable entries), reported "Excellent," 37.3 percent voted "Good," and the smallest category, 16.66 percent voted "Adequate" in the query regarding Cafeteria services. A second assessment instrument has been taken on the Bessemer campus: surveys have been taken in July 2008 in General Ed. Classes on the Bessemer campus. With such recent submissions, results have not yet been analyzed. Early returns are positive. The precise results of the survey will be submitted prior to August 29, 2008.

F. Use of Results—Now that you have your results, how do you intend to use these results or, if implemented early, how have you used these results to improve your overall unit for the upcoming academic year? **NOTE:** After you list how you intend to use these results, be sure to include such improvements in your new Unit Plan for the upcoming academic year.

1. *Budget will be benefited by increase in Bookstore gross profit margin by 2.5 percent.* We anticipate even better sales with the large increase in square footage of the sales floor in the large Bookstore expansion completed in early Summer 2008. Lawson State Community College merchandise has been provided across all lines of merchandise for great visual impact, using the larger space in the Birmingham store, and to increase overall sales, as well. We are researching and staying abreast of online student purchasing, as financially beneficial to the College. While the inventory ship-backs have been very timely, book order exactness could be only improved substantially by more timely book ordering by faculty and more specific and timely enrollment and attendance data both for present semesters, as well as pre-enrollment figures by department for upcoming semesters. The latter enrollment figures have not been forthcoming. Timing of order textbooks for resale continues to be monitored, such that the size of the orders matches the timing of the textbook (and other inventory) sales, thus offsetting the purchase investment. Book sales tend to mirror enrollment, and we have been pleased to build on the increases in 2006-2007 with a 20 percent increase in Bessemer Bookstore sales in the key month of September 2007 over September 2006.

We have very closely monitored shrinkage, to increase these Gross Margin figures further, and have analyzed best-practice concepts in shrinkage, concluding at the present that shrinkage is very minimal, according to our tests. For example, since October 2007, the two bookstore managers and the Financial Services Director have been in the process of using the results above and implementing concepts reiterated at a very effectively communicated College Bookstore Shrinkage Workshop at the NACS Annual State Convention. As stated, in order to use the results above and integrate shrinkage best practices, we have discussed LSCC dollar shrink figure and percentage to sales the development by each store of a Loss Prevention Policy and Procedure documents, manual, etc. We have discussed shrinkage in terms of amount of merchandise to make it more real to employees. We have involved—and continue to involve—bookstore employees asking their opinions as to how we can cut shrinkage in our store and illustrating how shrinkage is costly to everyone. We have discussed shoplifter danger signals, non-accusatory customer service statements, and a known theft log. We have discussed the need for even better superior customer service to deter would-be shoplifters. We continue to desire additional help on the sales floor to assist students during rush and a visibility of the campus security officers in and around our bookstore during the critical rush period.

2. *Budget-neutrality is good, when we can service the student/customers with this excellent service—meals.* We will continue attempting to market new food products and combos. We continue to monitor the cost center's net profitability, which was up this year, particularly on the Bessemer campus, specifically, the gross profit margin for the seven months ended April 30, 2008 was \$8,384.83 or 37.74%. Every year, we have been sensitive to student hours-of-operation preferences

3. *Budget will be benefited by projected increase in net Athletic Revenues by 1.0 percent.* Increases in Basketball receipts will occur with increased enrollment and increased publicity. As to Baseball season receipts, this continues to be dependent on both baseball field success and, currently, initiatives by a volunteer booster organization. Regarding basketball, we are ensuring that students who do not have legitimate passes pay their fair share. Proper proactive communication with coaches, etc. has been helpful in this connection. The College continues its policy of promoting the College through liberal coach, high school group (usually free gate) to assure the broadest net for future player prospects. Thus, increasing enrollment appears to be the engine that would drive increased sales. From the internal control standpoint, we have even further developed our game reconciliation procedure, reconciling dollar and ticket numerics not only for the current game, but season-to-date at every game reconciliation

4. *The budget will benefit from the increase in machine vending revenue by 2.5%.* We have had excellent communication with the vending vendors. Monthly reports reflecting machine commissions have been supplied by email, particularly the Bessemer campus. It appears that the proper number of machines are located on both campuses. The vendors regularly speak with us about their strategy for rotation and substitution of machine ware inventory. Sales are up, particularly on the Birmingham campus, specifically 31.4 percent. We do not expect this bounce to be perpetual since it is likely due to new machines from the new vendor Buffalo Rock/Pepsi, to continue as aggressively, particularly with the advent of the large expanded relocation of the Birmingham bookstore, with its better-priced snacks/candy and convenient soda drinks. In order to develop the receipts cited above, we had installed new attractive, very functional Pepsi/Buffalo Rock machines throughout both campuses, utilizing the more profitable \$1.25 bottles at every site. With the physical attraction as well as the workability of each machine, we have been reporting increasing sales in 2007-2008, building upon the values enumerated above.

5. *Double-documented Student/Customer satisfaction helps the budget on the positive side by providing revenues from repeat student customers and word-of-mouth advertising.* The 97.1 percent satisfaction rate reported from the December 2007 survey results on the LSCC Student Perception Survey for SACS Merged College Survey. In July 2008, on the Bessemer campus, student surveys of the Bessemer Bookstore and Bessemer Cafeteria were taken, with sample size of 100 in random general education classes. Results from those surveys are now being tabulated. The results to date appear very complimentary and most positive. A sampling of an actual survey sheet is provided in the Planning Hearing Notebook/Binder, as is a copy of the Excel spreadsheet showing the format and initial results in the tabulation/analysis. We will be using the surveys to increase food services response two percent to reach 94 percent who view the food service adequate to good to excellent.