



## FISCAL SERVICES DEPARTMENT and PROGRAM REVIEW: ANNUAL REPORT

### Part 5: Data Findings

Goal 1: Quantify the number of trainings offered per year and record attendance totals.  
Measurement dates will be July 2025 – June 2026.

- Dates of Trainings:
  - Grant training: October 2025 ~8-10 attendees, January 2026 ~6-8 attendees
  - AP and Travelbank: ~12 ad hoc 1:1 trainings
  - Budget Manager: Quarterly Meetings – 9/15/25, 12/15/25, 3/16/26, 6/11/26; approx. 20-30 attendees per session
  - Contract Training: authorized signers: 7/14/2026; 10 attendees
  - Banner Finance Training – February 18 & 26, 2026; 41 attendees
    - Agenda included GL Structure, Banner, Argos, and My Finance
  - Admin Assistant Training – November 5 & 6, 2025; 29 attendees
    - Agenda included Purchasing, Finance and Fiscal Forms, Department Travel for Instruction, Payroll/Benefits, IT, Campus Services, Campus Safety

Goal 2: Create a survey for COCC employees to understand baseline satisfaction with current Fiscal operations. Identify metrics that need improvement.

- Budget Manager Survey: 12/15/2025
  - On a scale of 1 to 10, there was a 7.6 confidence level in reviewing departmental budget and funds.
  - On a scale of 1 to 10, there was a 9.1 response that budget manager meetings provided useful information and training.
- Admin Assistants Training Survey: 2/18 and 2/26/2026
  - Training information was slightly to extremely helpful for all attendees.
- Anecdotal feedback – while not formally collected, Fiscal Services gets solicited (or not) feedback on what changes people would like to see in forms and processes.

### Part 6: Data Interpretation

Goal 1: Trainings are well attended with positive results. This represents a need for continuing education.

Goal 2: Comments are positive with limited surveys conducted. Need to target audiences to obtain constructive feedback.

## **Part 7: Action Plan**

Goal 1: Fiscal Services will continue to offer quarterly budget manager trainings, 2x/year Banner Finance trainings, Grant trainings each term, and ad hoc trainings as new process and guidance is developed. We will also offer ad hoc training to individuals, as needed.

Additionally, we will work with HR to add Fiscal onboarding for Admin Assistants and Director level positions and consider moving “admin assistant” training over to Instructional Specialists.

Create information packets to accompany onboarding training.

Goal 2: Create new surveys targeted at specific groups to assess customer satisfaction, feedback on forms/website, level of comfort reaching out, and collaborating with Fiscal Services. Groups include Admin Assistants, Grant Managers, and Budget Managers.