



LOS ANGELES COMMUNITY COLLEGES

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APPENDIX X

Audit Evaluation Survey

SECTION I:

Los Angeles Mission College: Payroll AUDIT

Los Angeles Mission College

13356 Eldridge Avenue

Sylmar, CA 91342-3245

Client Contact:

Karen A. Hoefel, VP of Administrative Services.

Audit Team:

Robert Johnson Senior Auditor, Keyna Crenshaw Auditor and Emi Ishikawa Auditor.

SECTION II: *To be completed by department/business unit management*

	Poor	Fair	Good	Very Good	Excellent
<u>Independence</u>					
1. Objectivity of auditors.	1	2	3	4	5
<u>Professional Proficiency</u>					
2. Technical proficiency of auditors.	1	2	3	4	5
3. Professionalism of auditors.	1	2	3	4	5
4. Communication skills of auditors.	1	2	3	4	5
<u>Scope of Work</u>					
5. Notification of the audit purpose and scope.	1	2	3	4	5
6. Audit focused on key areas.	1	2	3	4	5



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7. Department's concerns and perspective considered. 1 (2) 3 4 5

Poor Fair Good Very Good Excellent

Performance of Audit Work

8. Feedback of findings during the audit. 1 2 3 (4) 5

9. Duration of the audit. 1 2 (3) 4 5

10. Disruption of activities was minimal. 1 2 (3) 4 5

11. Timeliness of the audit report. 1 2 (3) 4 5

12. Accuracy of the audit findings. 1 (2) 3 4 5

13. Value of the audit recommendations. 1 2 (3) 4 5

14. Clarity of the audit report. 1 (2) (3) 4 5

15. Usefulness of the audit. 1 2 (3) 4 5

16. Was there anything about the audit you especially liked?

The audit was useful in identifying potential payroll errors, overpayments, etc.

17. Was there anything about the audit you especially disliked?

Some of the findings are difficult to correct due to the culture in the District of users ignoring policies & procedures

18. Additional comments:

The audit is also useful in identifying potential new policies and procedures, Board rule revisions, etc.

Please feel free to use additional paper. Thank you for taking time to complete this survey. Please E-mail or mail to the Internal Audit department.



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Audit Evaluation Survey

LOS ANGELES COMMUNITY COLLEGE DISTRICT INTERNAL AUDIT DEPARTMENT

DATE: May 21, 2008
TO: Los Angeles Trade Technical College
FROM: **Arnold Blanshard, CPA/MBA – Director of Internal Audit**
SUBJECT: **Audit Evaluation Survey**

Internal Audit Department has established a Quality Assurance and Improvement Program. This program has been designed to ensure that each department/program/business unit audited has an opportunity to comment and assess Internal Audit Department's level of service and value added to the business.

Recently, an audit of your area was completed by ***Robert Johnson Senior Auditor, Keyna Crenshaw Auditor, and Emi Ishikawa Auditor***. To facilitate receiving any feedback you may have, please find attached an Audit Evaluation Survey for you, or your designee, to complete. I request that you complete the section referenced as **“To be completed by Department/Business unit management”** and return the survey to the Internal Audit department within 10 days.

Please be candid in your feedback on the auditor. The survey will be shared with the department and use as guide in the improvement of our service to the district. If you have any questions, please feel free to contact me at 213-891-2342. Thank you for your feedback and co-operation.



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APPENDIX X

Audit Evaluation Survey

SECTION I:

Los Angeles Trade Technical College: Payroll AUDIT

Los Angeles Trade Technical College

400 W. Washington Blvd,

Los Angeles, CA 90015

Client Contact:

Mary Gallagher, VP of Administration.

Audit Team:

Robert Johnson Senior Auditor, Keyna Crenshaw Auditor and Emi Ishikawa Auditor.

SECTION II: *To be completed by department/business unit management*

	Poor	Fair	Good	Very Good	Excellent
<u>Independence</u>					
1. Objectivity of auditors.	1	2	3	4	5
<u>Professional Proficiency</u>					
2. Technical proficiency of auditors.	1	2	3	4	5
3. Professionalism of auditors.	1	2	3	4	5
4. Communication skills of auditors.	1	2	3	4	5
<u>Scope of Work</u>					
5. Notification of the audit purpose and scope.	1	2	3	4	5
6. Audit focused on key areas.	1	2	3	4	5



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7. Department's concerns and perspective considered. 1 2 **3** 4 5

Poor Fair Good Very Good Excellent

Performance of Audit Work

8. Feedback of findings during the audit. 1 2 **3** 4 5

9. Duration of the audit. 1 2 **3** 4 5

10. Disruption of activities was minimal. 1 2 3 **4** 5

11. Timeliness of the audit report. 1 2 **3** 4 5

12. Accuracy of the audit findings. 1 2 **3** 4 5

13. Value of the audit recommendations. 1 2 **3** 4 5

14. Clarity of the audit report. 1 2 **3** 4 5

15. Usefulness of the audit. 1 2 3 **4** 5

16. Was there anything about the audit you especially liked?

It is great that we finally have internal auditing being conducted. It s very good for us and your team is very knowledgeable and easy to work with.

17. Was there anything about the audit you especially disliked?

There needs to be a caveat in the audit findings that this is the first time internal auditing has occurred for some time (if ever) and that some of the findings are the result of policies and procedures not being updated/changed.

18. Additional comments:

You are all helping us to perform our jobs much better and as you go forward we will be a well functioning organization because of your work.

Thank you!!



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Please feel free to use additional paper. Thank you for taking time to complete this survey. Please E-mail or mail to the Internal Audit department.



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APPENDIX X

Audit Evaluation Survey

SECTION I:

Los Angeles Harbor College: Payroll AUDIT

Los Angeles Harbor College

1111 Figueroa Place

Wilmington, CA 90029

Client Contact:

Ann Tomlison, VP of Administrative Services.

Audit Team:

Robert Johnson Senior Auditor, Keyna Crenshaw Auditor and Emi Ishikawa Auditor.

SECTION II: *To be completed by department/business unit management*

	Poor	Fair	Good	Very Good	Excellent
<u>Independence</u>					
1. Objectivity of auditors.	1	2	3	4	5
<u>Professional Proficiency</u>					
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5. Notification of the audit purpose and scope.	1	2	3	4	5
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13. Value of the audit recommendations. 1 2 3 4 5

14. Clarity of the audit report. 1 2 3 4 5

15. Usefulness of the audit. 1 2 3 4 5

16. Was there anything about the audit you especially liked?

The discussions at the end with senior staff.

17. Was there anything about the audit you especially disliked?

No

18. Additional comments:

Please feel free to use additional paper. Thank you for taking time to complete this survey. Please E-mail or mail to the Internal Audit department.



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Audit Evaluation Survey

LOS ANGELES COMMUNITY COLLEGE DISTRICT INTERNAL AUDIT DEPARTMENT

DATE: May 21, 2008
TO: West Los Angeles College
FROM: **Arnold Blanshard, CPA/MBA – Director of Internal Audit**
SUBJECT: **Audit Evaluation Survey**

Internal Audit Department has established a Quality Assurance and Improvement Program. This program has been designed to ensure that each department/program/business unit audited has an opportunity to comment and assess Internal Audit Department's level of service and value added to the business.

Recently, an audit of your area was completed by ***Robert Johnson Senior Auditor, Keyna Crenshaw Auditor, and Emi Ishikawa Auditor***. To facilitate receiving any feedback you may have, please find attached an Audit Evaluation Survey for you, or your designee, to complete. I request that you complete the section referenced as **“To be completed by Department/Business unit management”** and return the survey to the Internal Audit department within 10 days.

Please be candid in your feedback on the auditor. The survey will be shared with the department and use as guide in the improvement of our service to the district. If you have any questions, please feel free to contact me at 213-891-2342. Thank you for your feedback and co-operation.



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APPENDIX X

Audit Evaluation Survey

SECTION I:

West Los Angeles College: Payroll AUDIT

West Los Angeles College

9000 Overland Avenue

Culver City, CA 90230

Client Contact:

John Oester, VP of Administrative Service.

Audit Team:

Robert Johnson Senior Auditor, Keyna Crenshaw Auditor and Emi Ishikawa Auditor.

SECTION II: *To be completed by department/business unit management*

	Poor	Fair	Good	Very Good	Excellent
<u>Independence</u>					
1. Objectivity of auditors.	1	2	<u>3</u>	4	5
<u>Professional Proficiency</u>					
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3. Professionalism of auditors.	1	2	3	4	<u>5</u>
4. Communication skills of auditors.	1	2	3	<u>4</u>	5
<u>Scope of Work</u>					
5. Notification of the audit purpose and scope.	1	2	3	<u>4</u>	5
6. Audit focused on key areas.	1	2	3	4	<u>5</u>



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13. Value of the audit recommendations. 1 2 3 4 5

14. Clarity of the audit report. 1 2 3 4 5

15. Usefulness of the audit. 1 2 3 4 5

16. Was there anything about the audit you especially liked?

17. Was there anything about the audit you especially disliked?

When the auditors found exceptions or felt that items were missing, these should have been brought to the attention of all parties, including management, in a timely enough manner to allow the items to be found or clarified while the auditors were still present on site. If this had been done, it would have minimized the number of reportable items, shortened the final report, avoided many hard feelings, and decreased the subsequent back-and-forth that the items had been found and had been forwarded to the auditors multiple times.

18. Additional comments:

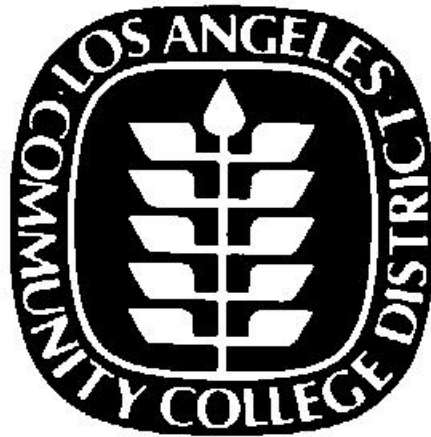


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Please feel free to use additional paper. Thank you for taking time to complete this survey. Please E-mail or mail to the Internal Audit department.

**EMPLOYER/EMPLOYEE
RELATIONS
CUSTOMER SATISFACTION
SURVEY RESULTS**



**Human Resources Division
Office of Employer/Employee Relations
November 2009**

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EXECUTIVE SUMMARY

The Employee Relations Client Satisfaction Survey was developed and conducted to establish baseline client satisfaction levels and to identify opportunities for improvement of the services of the Employer/Employee Relations (EER) unit within District Human Resources.

Two specific areas of service were addressed in the survey: management consulting and the preparation of disciplinary actions.

Invitations to participate in this survey were sent to 183 individuals beginning September 2008. Several months were allotted to gathering responses. 93 individuals responded for a response rate of 51%.

32% of respondents have never used EER services. Of those, 56% said it was because they had no need. A significant number (35%) said it was because they did not know what services were available from EER.

Those respondents who used EER services were asked to respond to additional questions about their satisfaction levels.

Regarding EER service generally, 44% of respondents felt EER was getting better or getting much better, while 50% felt EER was staying at about the same level.

When asked to express satisfaction levels for EER consulting services, 52.8% were very satisfied or satisfied.

Major opportunities for improvement of EER consulting services:

- Keeping clients informed of progress of issues
- Meeting timeline commitments

When asked to express satisfaction levels for EER discipline services, a slightly lesser 48.6% were very satisfied or satisfied.

Significant opportunities for improvement of EER discipline services:

- Communicating next steps
- Time from initial contact to presentation at Trustee meeting

Employer/Employee Relations Response

Based on analysis of the survey data, EER has preliminarily identified several areas with significant opportunity for improvement. Analysis will continue, and as other opportunities are identified, a department response will be crafted.

1. COMMUNICATION

OPPORTUNITY: 13% of all respondents, and 36% of respondents who have never utilized EER services, don't know what EER does.

RESPONSE: By the end of 2009, design and publish an EER internal web page highlighting available services, important department contacts, and including all EER published material gathered in a single easy-to-locate place.

OPPORTUNITY: For both consulting and discipline, keeping clients informed of progress gained only a minority of respondents as satisfied or very satisfied (45% and 40% respectively).

RESPONSE: EER will design case flow documentation and correspondence to advise all parties of next steps and relevant timeframes.

2. TIMELINESS

OPPORTUNITY: 39% of respondents are satisfied or very satisfied; however, 39% are neutral, dissatisfied, or very dissatisfied with the time it takes to get a disciplinary action from development to Trustee review.

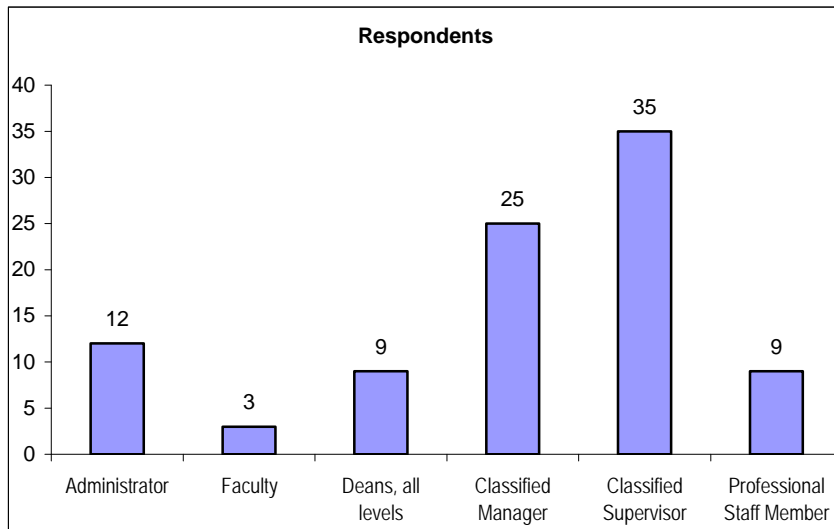
RESPONSE: Upon intake of a new case, EER will evaluate the action and assign (1) a target delivery date for the initial notice of recommended action, and (2) a target Trustee meeting date for the delivery of the final action.

RESPONSE: EER will monitor documentation flow, and routinely follow up with colleges to avoid process delays.

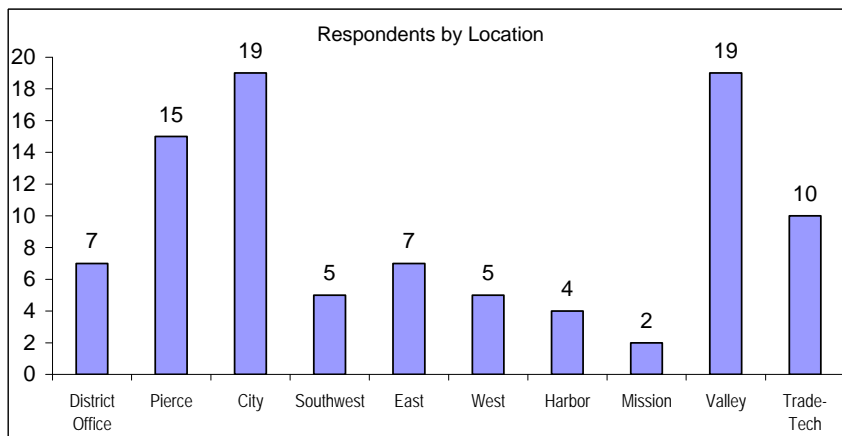
RESPONSE: EER will explore utilizing collaboration software to speed document development in cooperation with colleges.

I. RESPONDENT DEMOGRAPHICS

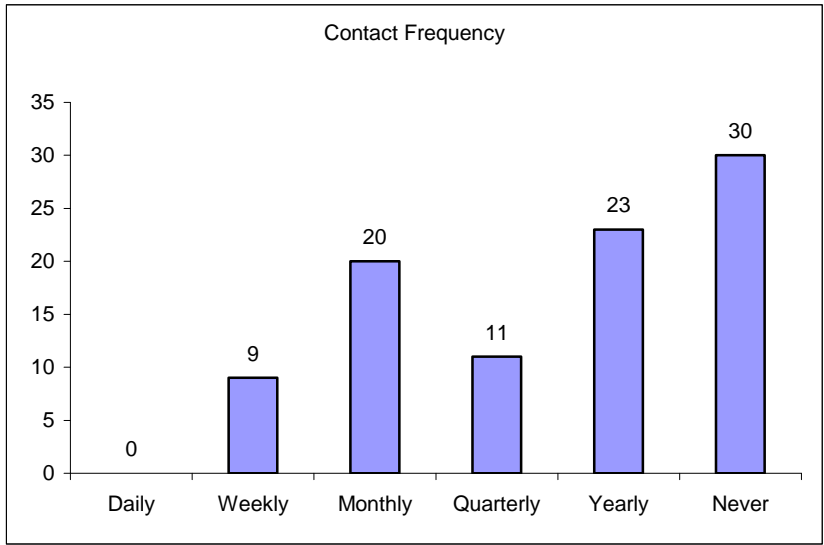
Invitations to respond to this survey were sent to all VPs, administrators, deans of all levels, classified management, classified supervisors, and professional staff throughout the District. Of a total of 93 respondents the largest group (38%) was classified supervisors. The next largest respondent group was classified managers (27%).



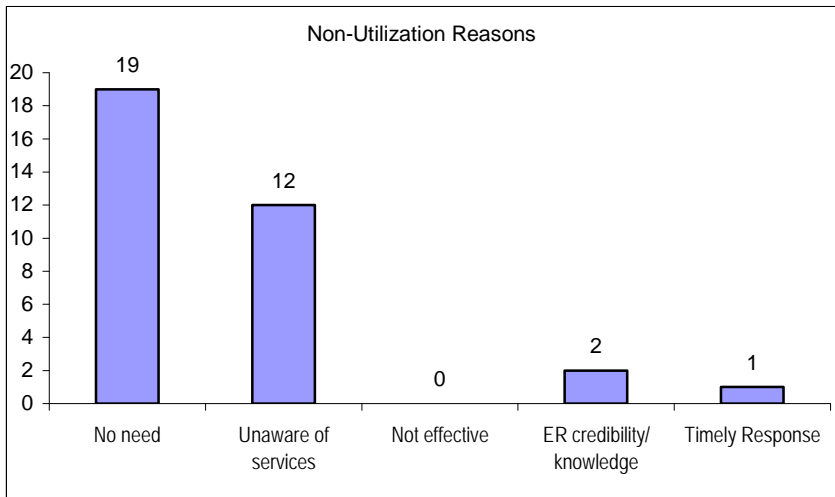
Respondents by location indicate Valley and Pierce Colleges yielded the largest responding groups.



32% of respondents have never used our services.



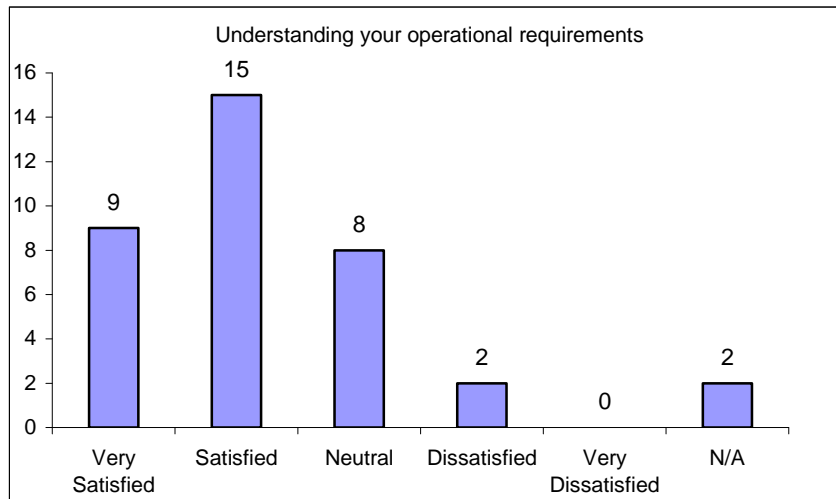
Of those who have never used our services, a full 35% of respondents have never used our services because they don't know what we do, providing us with an opportunity for significant improvement.



II. EMPLOYEE RELATIONS CONSULTING SERVICES

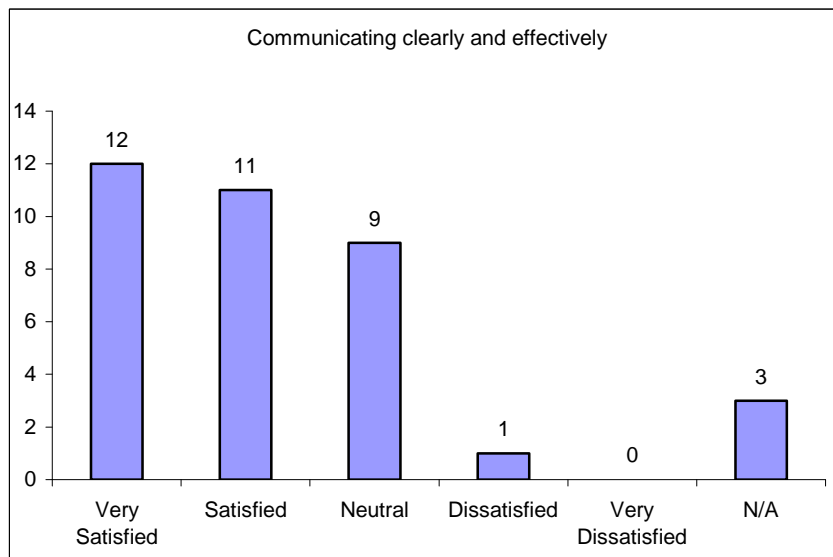
Question 5 – Please rate: Understanding Your Operational Requirements

Response: 66% of respondents are satisfied or very satisfied with our ability to understand operational requirements.



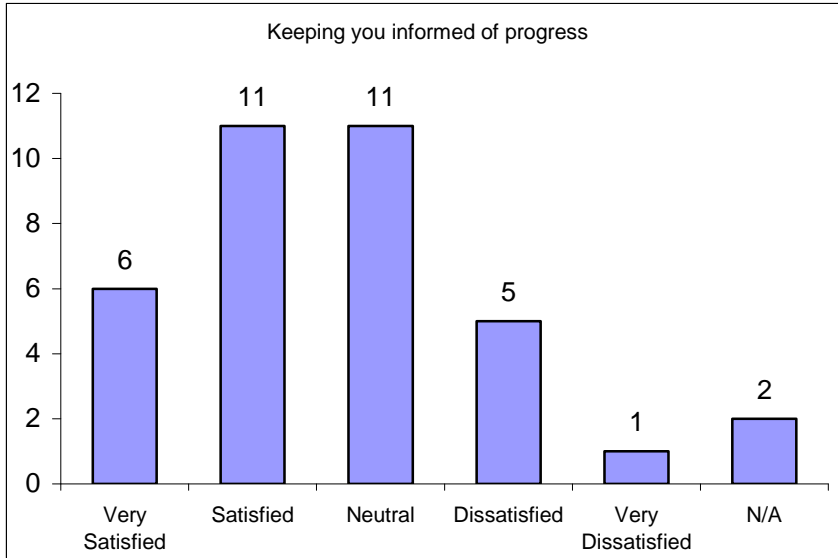
Question 5 – Please rate: Communicating Clearly and Effectively

Response: 63% of respondents were satisfied or very satisfied with the clarity and effectiveness of our communications.



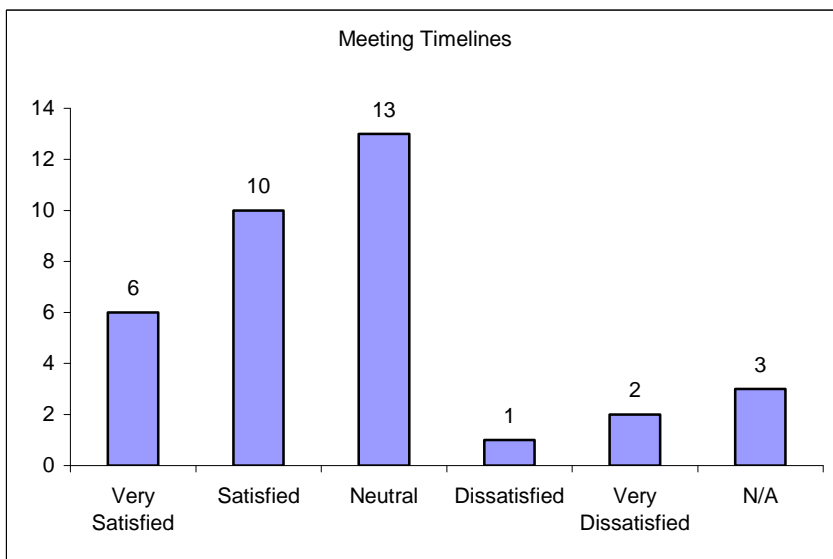
Question 5 – Please rate: Keeping You Informed of Progress

Response: 47% of respondents are satisfied or very satisfied; however, 30% are neutral, providing a significant opportunity for improvement.



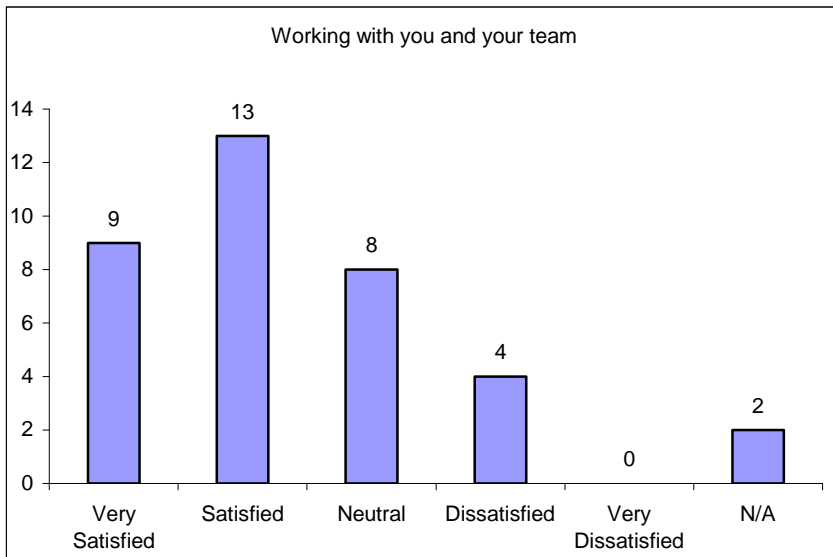
Question 5 – Please rate: Meeting Timelines

Response: 46% of respondents are satisfied or very satisfied; however, 37% are neutral, providing a significant opportunity for improvement.



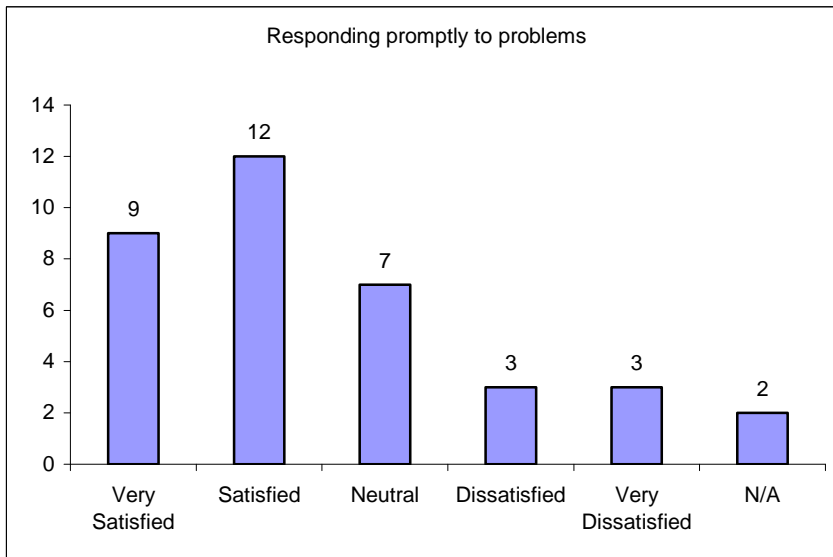
Question 5 – Please rate: Working with You and Your Team

Response: 61% of respondents are satisfied or very satisfied; however, 22% are neutral and 11% are dissatisfied, providing a significant opportunity for improvement.



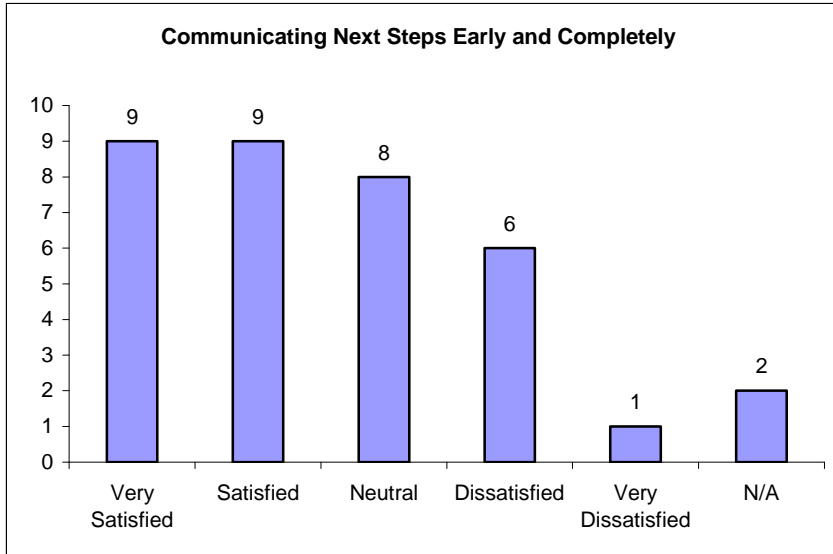
Question 5 – Please rate: Responding Promptly to Problems

Response: 58% of respondents are satisfied or very satisfied; however, 36% are neutral, dissatisfied, or very dissatisfied, providing a significant opportunity for improvement.



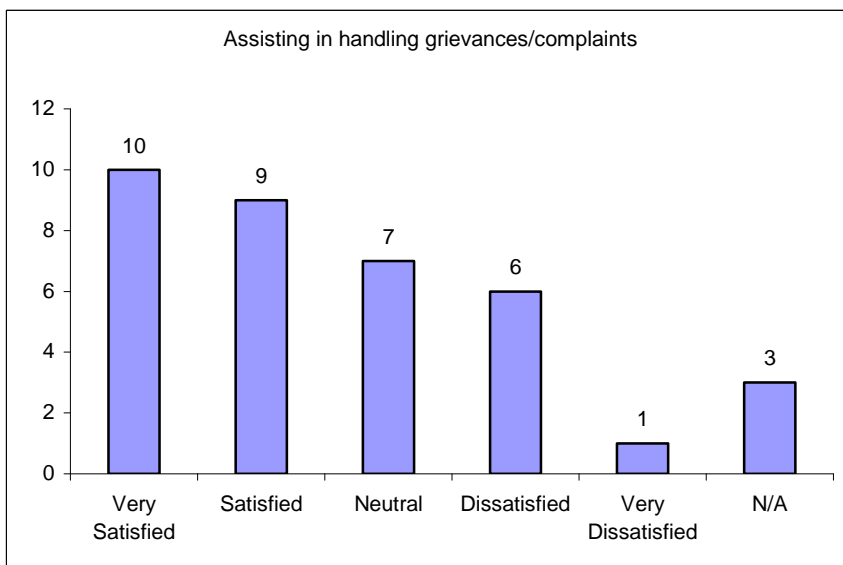
Question 5 – Please rate: Communicating Next Steps Early and Completely

Response: 50% of respondents are satisfied or very satisfied; however, 42% are neutral, dissatisfied, or very dissatisfied, providing a significant opportunity for improvement.



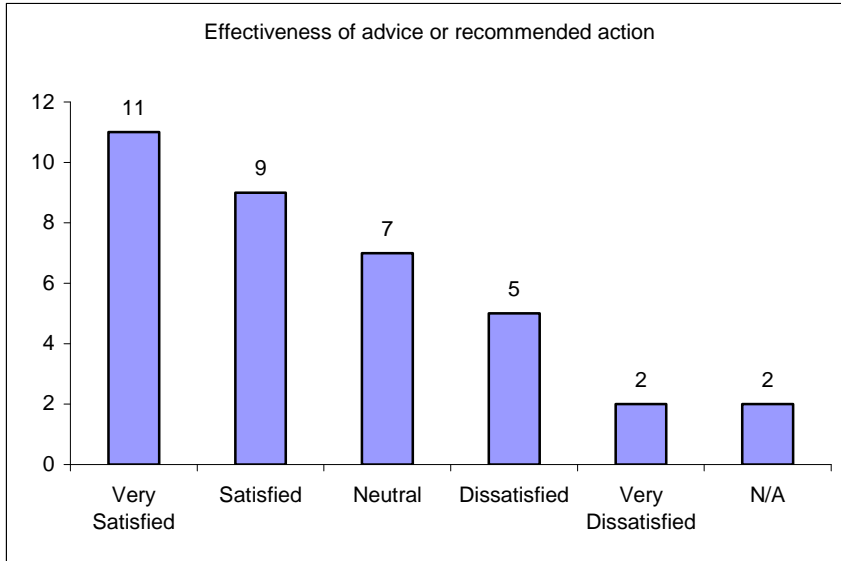
Question 5 – Please rate: Assisting in Handling Grievances and Complaints

Response: 53% of respondents are satisfied or very satisfied; however, 39% are neutral, dissatisfied, or very dissatisfied, providing a significant opportunity for improvement.



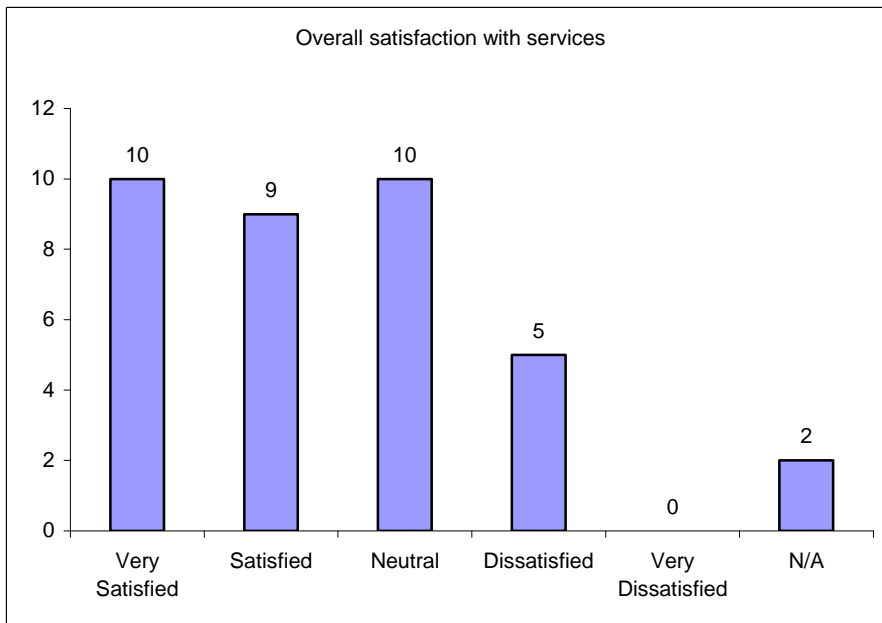
Question 5 – Please rate: Effectiveness of Advice or Recommended Action

Response: 53% of respondents are satisfied or very satisfied; however, 39% are neutral, dissatisfied, or very dissatisfied, providing a significant opportunity for improvement.



Question 5 – Please rate: Overall Satisfaction with Consulting Services

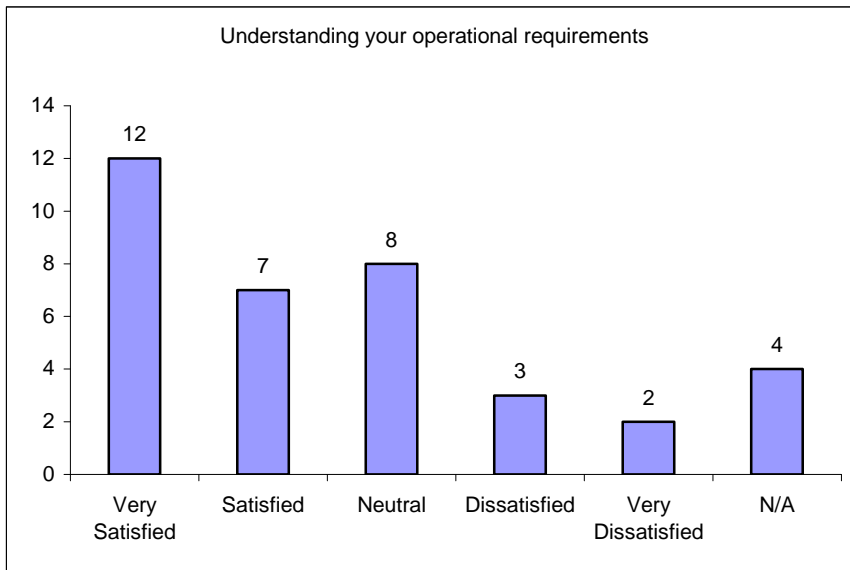
Response: 53% of respondents are satisfied or very satisfied; however, 28% are neutral, and 14% are dissatisfied or very dissatisfied, providing a significant opportunity for improvement.



III. EMPLOYEE RELATIONS DISCIPLINE SERVICES

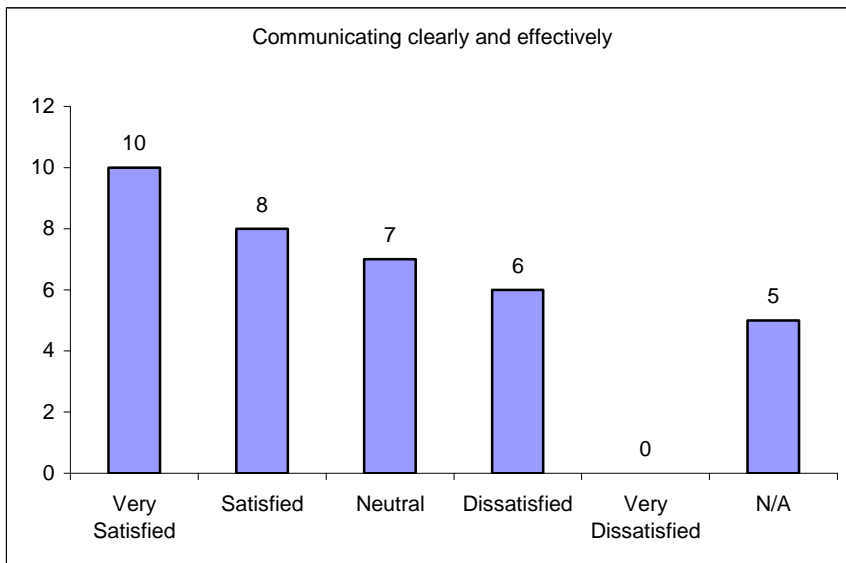
Question 6 – Please rate: Understanding Your Operational Requirements

Response: 53% of respondents are satisfied or very satisfied; however, 22% are neutral, and 14% are dissatisfied or very dissatisfied, providing a significant opportunity for improvement.



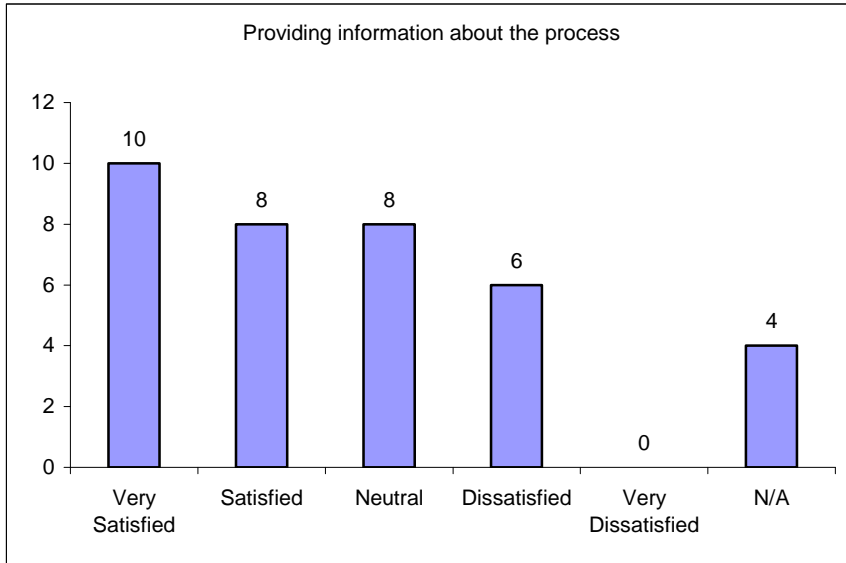
Question 6 – Please rate: Communicating Clearly and Effectively

Response: 50% of respondents are satisfied or very satisfied; however, 36% are neutral, dissatisfied, or very dissatisfied, providing a significant opportunity for improvement.



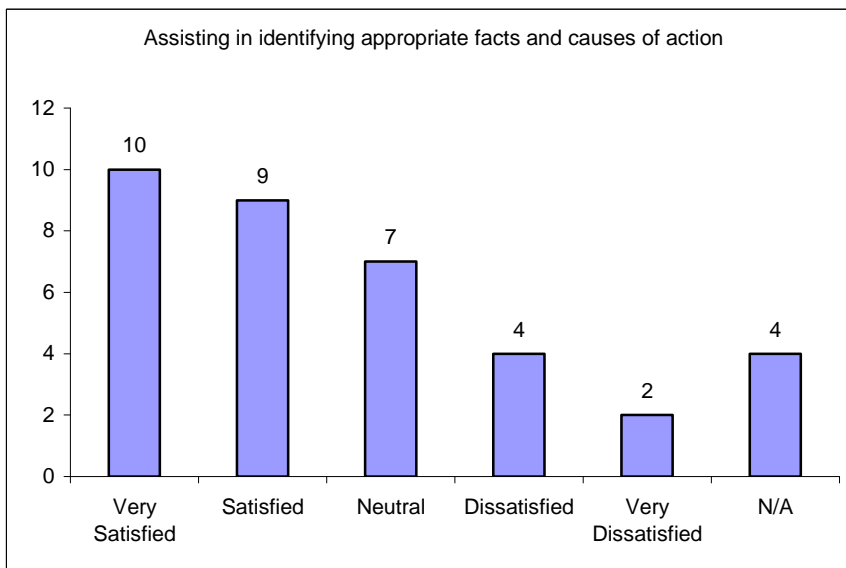
Question 6 – Please rate: Providing Information about the Process

Response: 50% of respondents are satisfied or very satisfied; however, 39% are neutral, dissatisfied, or very dissatisfied, providing a significant opportunity for improvement.



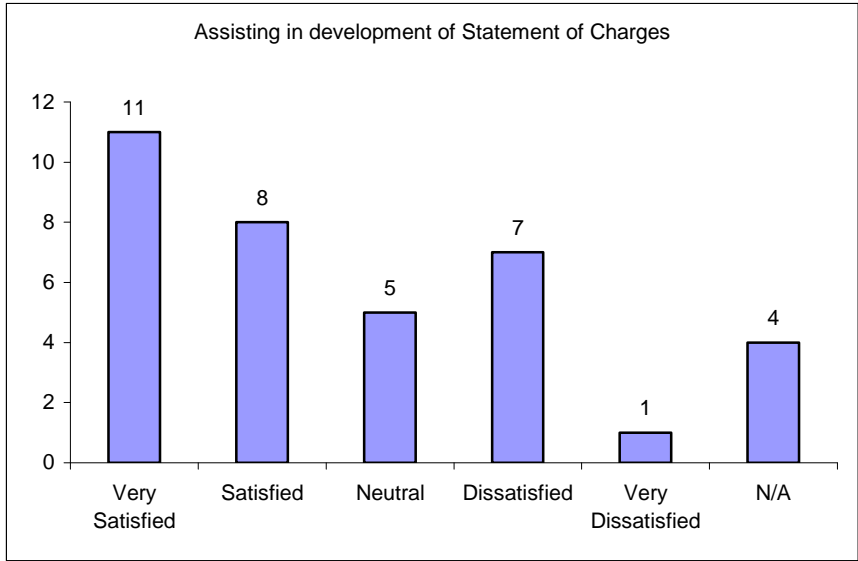
Question 6 – Please rate: Assisting in Identifying Appropriate Facts and Causes of Action

Response: 53% of respondents are satisfied or very satisfied; however, 36% are neutral, dissatisfied, or very dissatisfied, providing a significant opportunity for improvement.



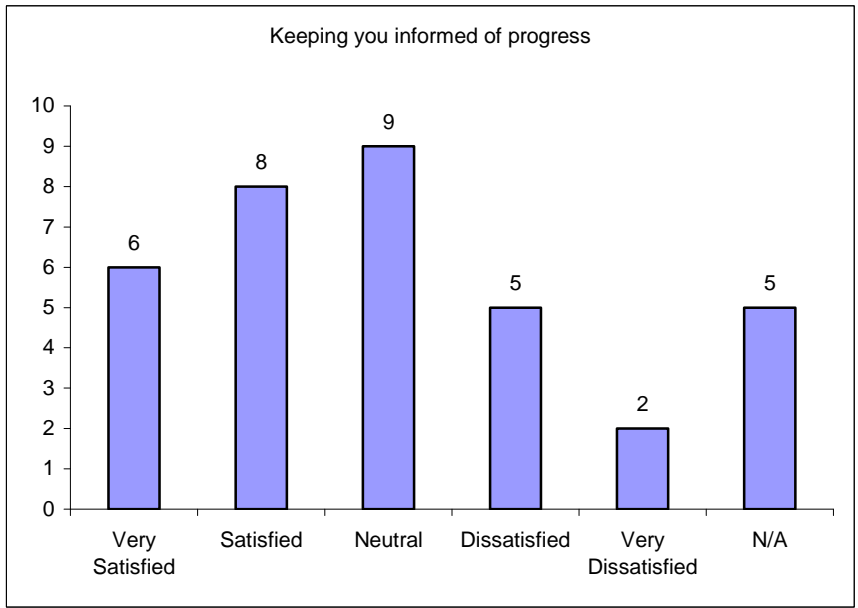
Question 6 – Please rate: Assisting in Development of Statement of Charges

Response: 50% of respondents are satisfied or very satisfied; however, 36% are neutral, dissatisfied, or very dissatisfied, providing a significant opportunity for improvement.



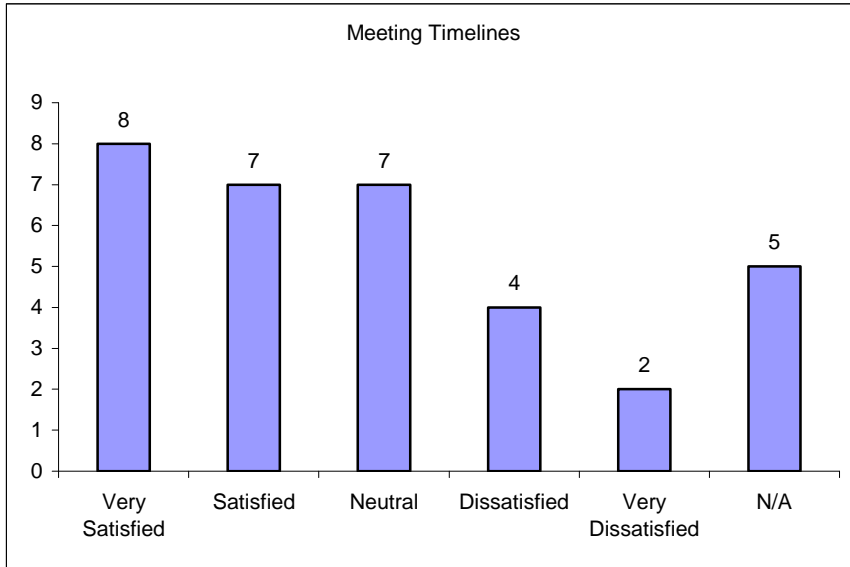
Question 6 – Please rate: Keeping You Informed of Progress

Response: 39% of respondents are satisfied or very satisfied; however, 44% are neutral, dissatisfied, or very dissatisfied, providing a very significant opportunity for improvement.



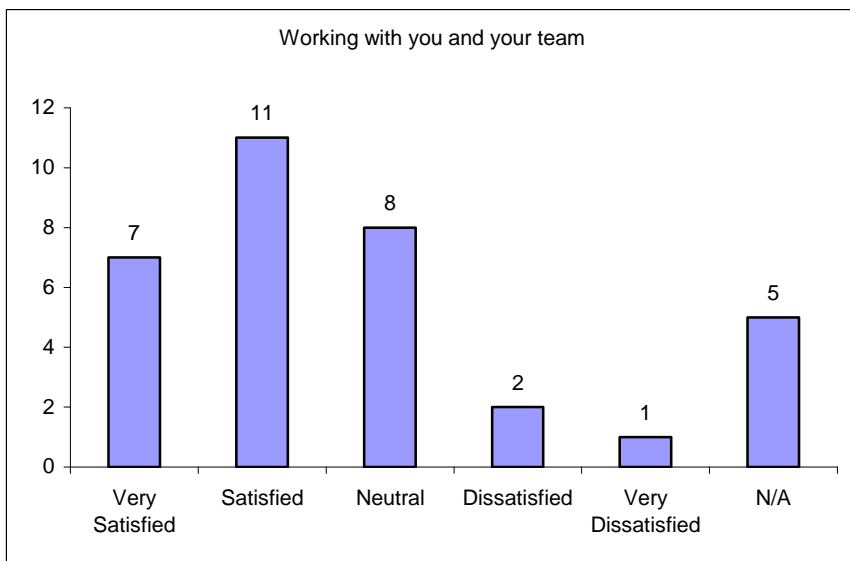
Question 6 – Please rate: Meeting Timelines

Response: 45% of respondents are satisfied or very satisfied; however, 39% are neutral, dissatisfied, or very dissatisfied, providing a significant opportunity for improvement.



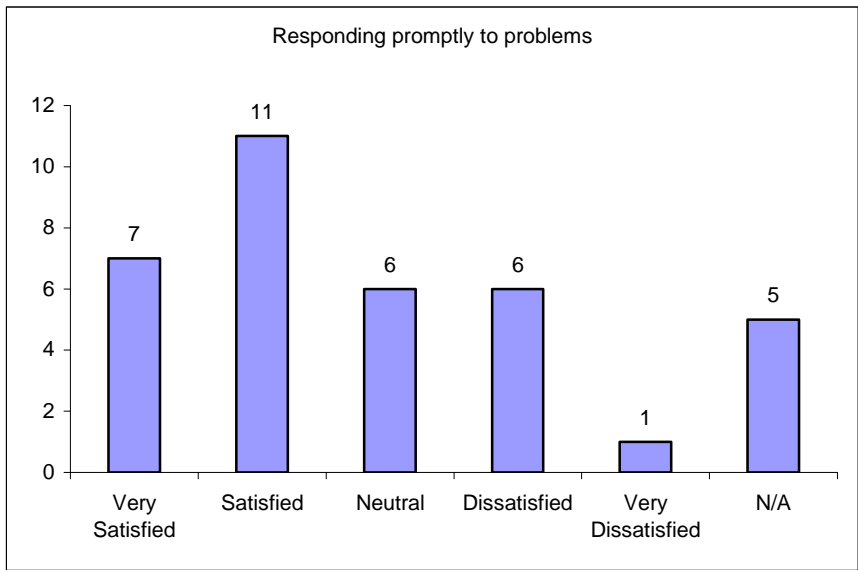
Question 6 – Please rate: Working with You and Your Team

Response: 53% of respondents are satisfied or very satisfied; however, 32% are neutral, dissatisfied, or very dissatisfied, providing a significant opportunity for improvement.



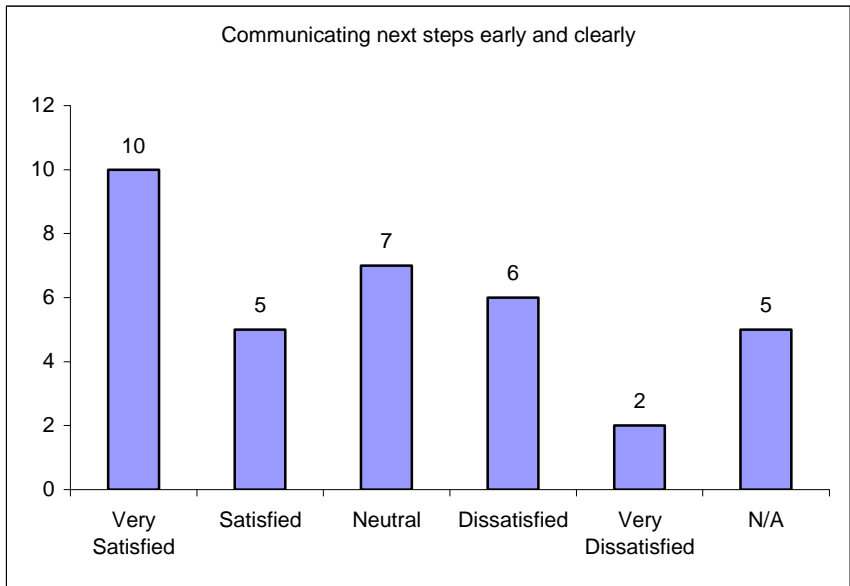
Question 6 – Please rate: Responding Promptly to Problems

Response: 50% of respondents are satisfied or very satisfied; however, 42% are neutral, dissatisfied, or very dissatisfied, providing a very significant opportunity for improvement.



Question 6 – Please rate: Communicating Clearly and Effectively

Response: 43% of respondents are satisfied or very satisfied; however, 43% are neutral, dissatisfied, or very dissatisfied, providing a very significant opportunity for improvement.



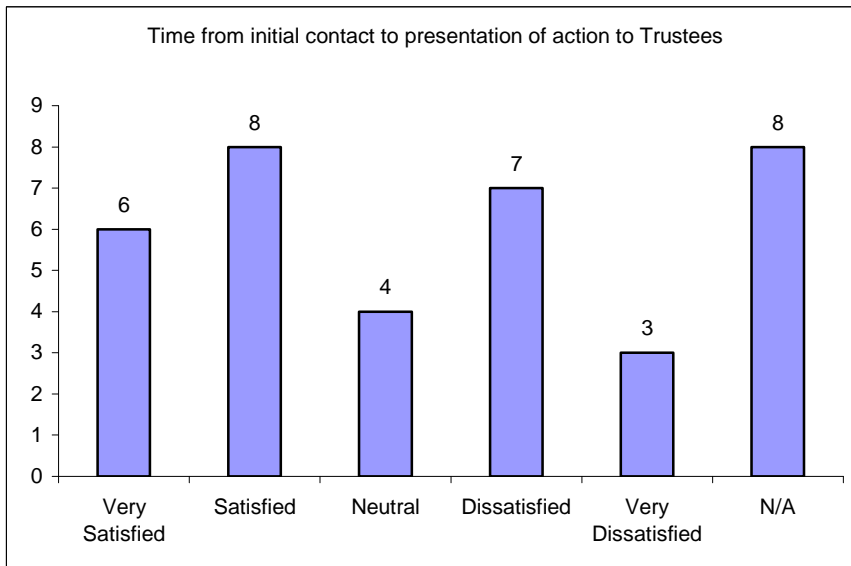
Question 6 – Please rate: Assisting in Handling Grievances and Complaints

Response: 55% of respondents are satisfied or very satisfied; however, 30% are neutral, dissatisfied, or very dissatisfied, providing a significant opportunity for improvement.



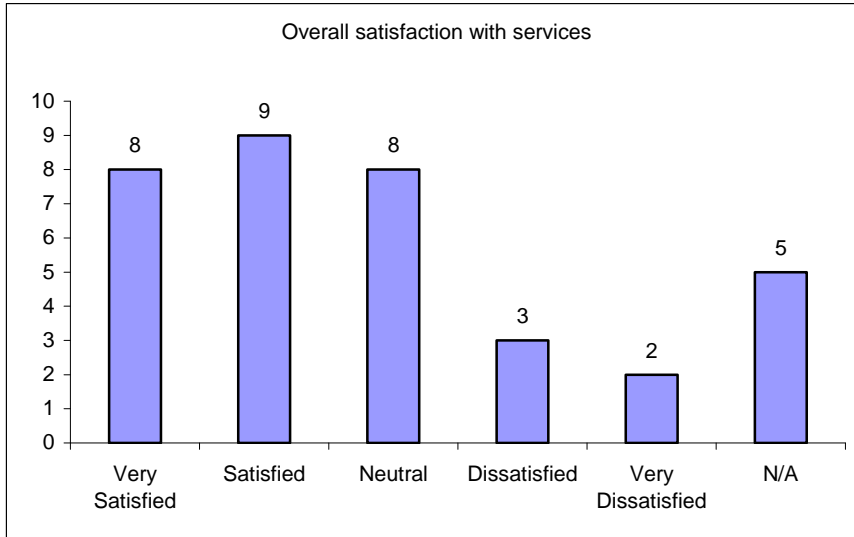
Question 6 – Please rate: Time From Initial Contact to Presentation of Action to Board of Trustees

Response: 39% of respondents are satisfied or very satisfied; however, 39% are neutral, dissatisfied, or very dissatisfied, providing a very significant opportunity for improvement.



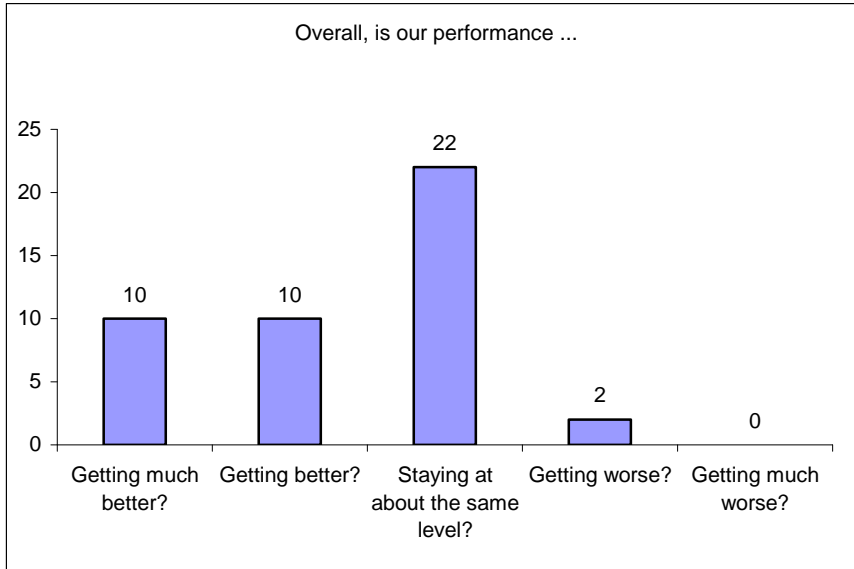
Question 6 – Please rate: Overall Satisfaction with Employee Discipline Services

Response: 48% of respondents are satisfied or very satisfied; however, 36% are neutral, dissatisfied, or very dissatisfied, providing a significant opportunity for improvement.



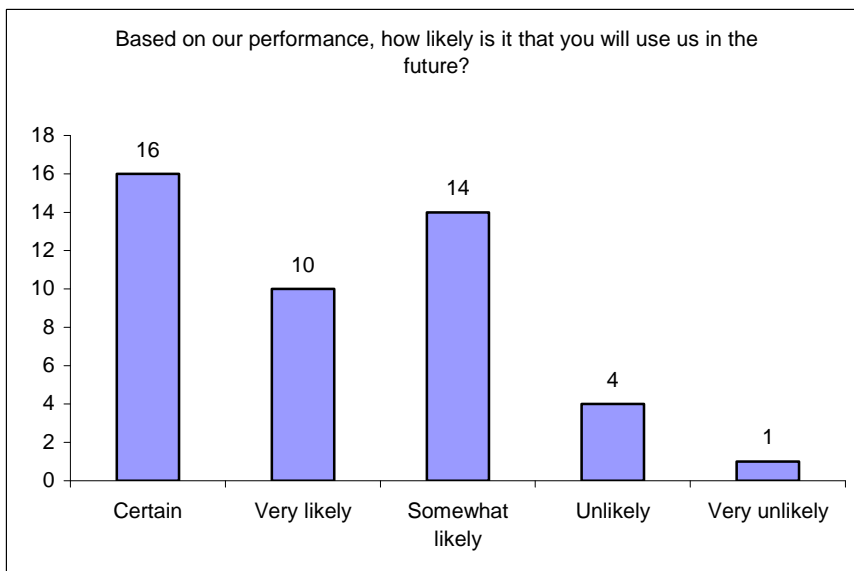
Question 7 – Overall, our performance is:

Response: 45% of respondents believe our service is improving; however, 50% believe our service is staying at the same level of quality, while 4.5% actually believe that we are losing ground.



Question 8 – Please rate: Will You Use Us in the Future

Response: 56% of respondents are very likely or certain to use our services again. More significantly, 11% are unlikely or very unlikely to use us again. Given the necessity of using our services for formal discipline, even an 11% non-return rate is a very significant opportunity for improvement.



Question 9 – Where would you most like to see improvements in our products/services and why?

1	This department needs additional staffing. I want almost immediate access to staff when dealing with employee relations or discipline problems.
2	Responding to telephone calls.
3	Like to see a rep from the District to show up at grievance hearings, like to see rejection of "frivolous" grievances rather than treating everything as legitimate whether or not it is - big use of time and often validates bad behavior
4	I am not familiar with your service; therefore, no comment.
5	would like to see improvement on the grievance process in a manner.
6	More support for management and supervisors in regards to employee discipline issues
7	Dealing with and handling I/A related absences. Better communication with I/A status and return to work permits. Aggressive discipline support and follow through.
8	I feel that Troy Verrett and Michael Shanahan have provided me, the Director of College Facilities for LAVC with outstanding support. However, I strongly feel that they are woefully under staff. I think they need two more staff members so Troy and the other two could handle three campuses each. They would provide the support needed at each campus and provide training that supervisors need. I know there are many supervisors that do not know how to handle problem employees. These problem employees disrupt the operation of their departments. If the supervisors were properly trained and provided the proper guidance, the supervisors would be able to take effective courses of action to hold problem employees accountable. Every organization at the campus level are short handed and this situation is going to get worse. We cannot afford to allow some employees to do what they want or have bad attendance. These problem employees impact the rest of employees because everyone see the problem employee(s) not being held accountable for their actions and then start not care about their productivity because no one else does. One bad employee can have a devastating impact to any organization. The added staffing for Employee Department will provide the guidance and trainers to help supervisors. I cannot stress this enough, problem employees that are not held accountable impact the organization.
9	I would like to see more in house meetings to learn more about your services and problem solving solutions.
10	I don't know what ER does.
11	i need to do performance evaluation - something I've never done and way overdue. so the improvement needs to be on my part.
12	In terms of the discipline process, Troy is not clear and the process drags on.
13	Provide some guidance on what you are and the services you provide
14	Training for supervisory personnel
15	timely responses is critical
16	The time it takes for the discipline process is too long. We need to get statement of charges out quickly and on Board of Trustees agenda in a much quicker fashion.
17	Don't know
18	Better responsiveness and help from support staff
19	send some information to me about your service
20	more feedback on what to expect in the coming months for district employees
21	I have not used the services so I cannot address this question.
22	the morale of our custodial staff
23	Unable to answer since I have not used the service
24	Instructions to all employees in the district on the proper process of disciplinary action. So everyone is on the same page and knows the process correctly.
25	deal with tenured prof.s who do not do there jobs

Question 10 – What aspect of Employer/Employee Relations has been the most useful to you and why?

1	The willingness of Michael Shanahan to meet with our college managers to discuss issues has been extremely helpful. He is very service oriented and gives good advice and direction. Clone him twice and we will have what we need.
2	Once I am able to reach someone, service has been very good.
3	Personal contact & support, insight into District dynamics & resources
4	I am not familiar with your service; therefore, no comment.
5	None
6	Grievance and discipline support and information. U notice prep.
7	The guidance from Troy Verrett and Michael Shanahan. I have learned quite a bit from both of them.
8	Might use the services if I understood what is available or offered.
9	Michael is very helpful in answering all kinds of questions, and doing so in a timely manner. I really appreciate his help.
10	Grievance and evaluation support
11	I have greatly appreciated the help I have received on employee discipline.
12	Don't know
13	The responsiveness of the new vice chancellor. More results in less time
14	did not know about it
15	what do you do again?
16	I have not used the services so I cannot address this question.
17	have not used service as of today.
18	Unable to answer since I have not used the service
19	Knowing the proper ways and limitations that we have in the disciplinary process, that keeps us on our toes to do it right and not go outside the boundaries set.
20	none

LOS ANGELES COMMUNITY COLLEGE DISTRICT



**REPORT
OF
SERVICES SATISFACTION SURVEY**

OFFICE OF BUDGET AND MANAGEMENT ANALYSIS

February 2009

Contact List For Office of Budget and Management Analysis

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Prop A/AA, Measure J Bond Reconciliation	Sheri Okamoto-Sr. Financial Analyst	Okamots@laccd.edu 213-891-2101
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The survey is prepared and compiled by Emil Mubarakshin, Financial Analyst

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Acknowledgement

The Office of Budget and Management Analysis appreciates the time and effort that respondents spent in completing the Service Satisfaction Survey, and in providing comments and suggestions to improve our services. The District Office of Budget and Management Analysis will review all comments and suggestions for improvement of our services.

Exhibit I lists recommendations that we have identified from the comments of respondents. Some of these recommendations from the Specially Funded Program Directors, Managers and users related to issues that require collaborative work with other offices such as Accounting, Business Services and Contracts Offices at the District Office. We will identify the related issues and work with the managers and staff of appropriate offices.

In order to address the issues related to communication with our office, we will provide to the Colleges an updated list of the staff of the Budget, Accounting, Business Services and Contract Offices. We welcome call to our staff any time to address any issues you might have. The contact list of the Budget Office is provided in the beginning of this study.

Thank you again for your participation.

March 2009

Executive Summary

The Services Satisfaction Survey of the District Office of Budget and Management Analysis was conducted to assess and evaluate the functions and services currently provided and to identify areas that could be improved, changed, or enhanced.

The District Office of Budget and Management Analysis coordinates the allocation of resources to achieve the District's educational mission by:

- 1) developing and maintaining the District's budget and financial plan in conjunction with the colleges;
- 2) supporting the Board, administration and District Budget Committee decision-making processes with revenue and expenditure projections and analyses; and
- 3) complying with County, State, and Federal fiscal reporting requirements.

The Office has responsibilities in preparing and developing the District and college budgets; in operating and maintaining the District's budget throughout the year; in providing instructions and guidelines for colleges to develop their budget operations plans; and in monitoring college financial plans, and monthly and quarterly financial status projections.

The Services Satisfaction Survey was sent to 226 respondents on December 16, 2008. 148 responses were collected by January 29, 2009, a 65% response rate. Among the respondents were 6 College Presidents, 9 Vice Presidents of Administration, 42 SFP Program Directors and Managers, 25 Budget Users and 66 respondents with other areas of responsibility.

The survey rated and evaluated the following services and processes:

- I. District Budget Office Services
- II. Budgeting Processes
- III. SFP and Grants Management Process
- IV. Budget Preparation and Training
- V. Report Analysis

Overall, the services of District Budget Office were rated as follows:

- 49% of respondents as “Good” or “Excellent”,
- 16% of respondents as “Average”,
- 12% of respondents as “Needs Improvement”, and
- 23% of respondents as “Not Applicable”.

In the area of District Budget Office Services, 69% of respondents rated the service as “Good” or “Excellent”. Where only 4% of respondents felt that responding to budget inquiries need improvement, 12-13% of the respondents rated the processing of budget transactions and providing historical fiscal data in this way.

In the area of Budgeting Processes, 64% of respondents rated the service as “Good” or “Excellent”. 5-6% of respondents felt that the budget processes in the Unrestricted General Fund or in all programs need improvement, while 9% of the respondents saw this need in the guidelines and instructions.

In the area of SFP and Grants Management Process, 51% of respondents rated the service as “Good” or “Excellent”. 14% of respondents felt that the process of establishing new SFP budget and supporting SFP programs needs improvement. The process of tracking program budgets, revenues and expenditures, and providing reports, are also lacking according to 18-21% of the respondents.

In the area of Budget Preparation and Training, 57% of respondents rated the service as “Good” or “Excellent”. 11% of respondents felt that the service of providing coordination and instruction needs improvement, while 16% of respondents felt that the provision of sufficient training and technical assistance needs improvement.

In the area of Report Analysis, 34% of respondents rated the service as “Good” or “Excellent”. 8% of respondents felt that the College Financial Plan process needs improvement, while the same point of view is shared by 14% of respondents in regards to the Monthly Projection Report.

The following pages present a summary of the responses in each category.

Exhibit I.

Recommendations excerpted from the Comments and Suggestions from Respondents

I. System Changes

- 1) *Shift to a position-control based budget from the current dollar-based budgeting.*
- 2) *Use correct software for any SFP programs and their budget management which is designed for unique time-specific needs of grants and grant programs.*
- 3) *Budget decision should be aligned with research and planning and the mission and goals of the college.*

II. Process and Procedure Changes

- 1) *Reduce the time for establishing budget for new SFP programs.*
- 2) *Make SFP contracts initiated faster so that the budget can go online.*
- 3) *Develop faster method to see changes in our budget whenever revisions to allocation are done.*
- 4) *Decrease time from the moment of submitting the paperwork to receiving the completed BTA with the program number assigned.*
- 5) *Provide explanations and technical assistance on budget processes.*
- 6) *Get Admin Support funds from SFPs in a timely manner.*
- 7) *Speed up posting of year-end carryovers. Post ADG (Academic Development Grantee?) to the correct GL account. Show consistent benefit charges month to month.*

III. Communication, Training and Support

- 1) *Develop consistent system wide training and/or updated written policy and procedures. Training in budget processes and related computer systems.*
- 2) *Provide more training for SFP programs - specifically for new managers on managing budgets and budget processes.*
- 3) *Offer support for SFP programs.*
- 4) *Employ more service-oriented approach and collaborative style.*
- 5) *District staff to visit the colleges more and work side by side with SFP directors to develop a stronger and more collegial atmosphere.*
- 6) *Improve communication and coordination between the college and district operations.*

IV. Reporting Changes

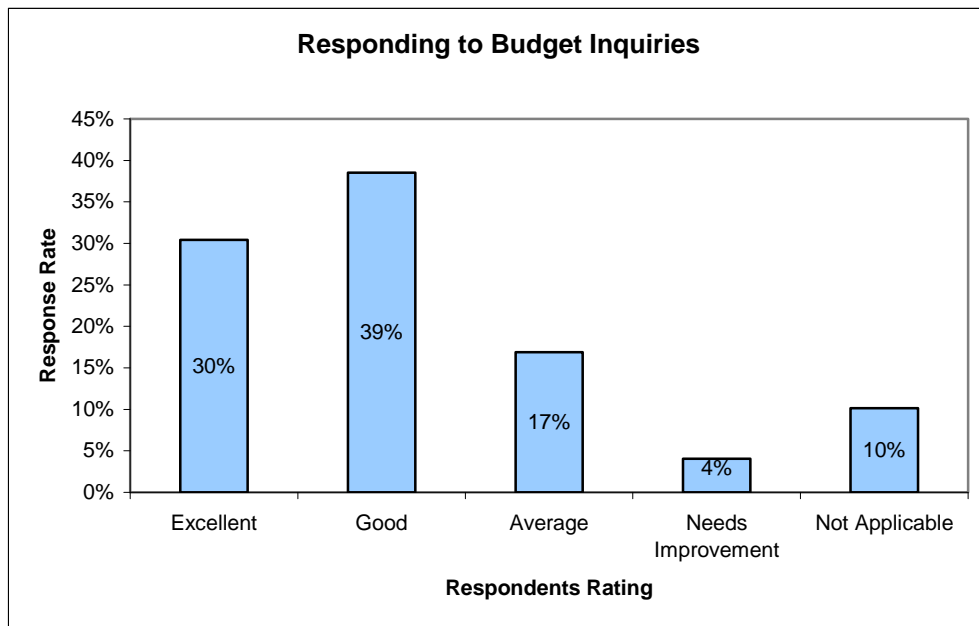
- 1) *Create, for budget purposes, a single, reliable resource for accurate and timely full-time equivalent faculty (FTEF), regular, hourly and total, by discipline, department and campus, along with some measurement of instructional productivity (e.g. average class size, FTES, WSCH/FTEF, etc.). Best source would not be District Budget Office but perhaps Educational Support Services Division.*
- 2) *College Monthly Projection Report - improve Attachment II of College Financial Plan to assist the college with the reconciliation of FTEF and more accurate projection of instructional costs.*
- 3) *Provide link between what we (college) think and can show we spent and what district thinks we have spent.*

- 4) *Make reports about charges to SFP budgets and provide more general information about SFP programs.*
- 5) *Create reports with more information to understand where department stands financially.*
- 6) *Show in detail salary and employee benefit charges in a timely manner on district reports.*
- 7) *List out each GL for Monthly Community Services Income & Expenditure.*
- 8) *Synchronize the reports for SAP system for all data and all reporting so that report data matches.*
- 9) *Do all projections in SAP.*

I. District Budget Office Services

Question 1-a. Please rate the service of responding to budget inquiries provided by the District Budget Office.

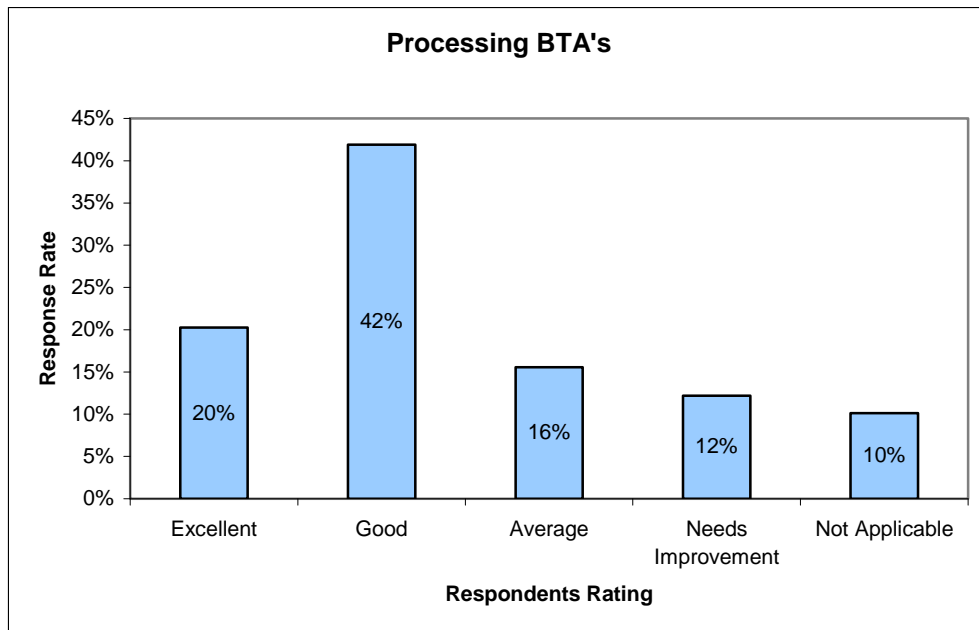
Response: In the sample of 148 respondents, 30% of respondents rated the service of responding to budget inquiries as “Excellent”; 39% rated as “Good”; 17% rated as "Average"; 4% considered that it "Needs improvement".



I. District Budget Office Services

Question 1-b. Please rate the service of processing budget transactions (new budgets, transfers, changes) by the District Budget Office.

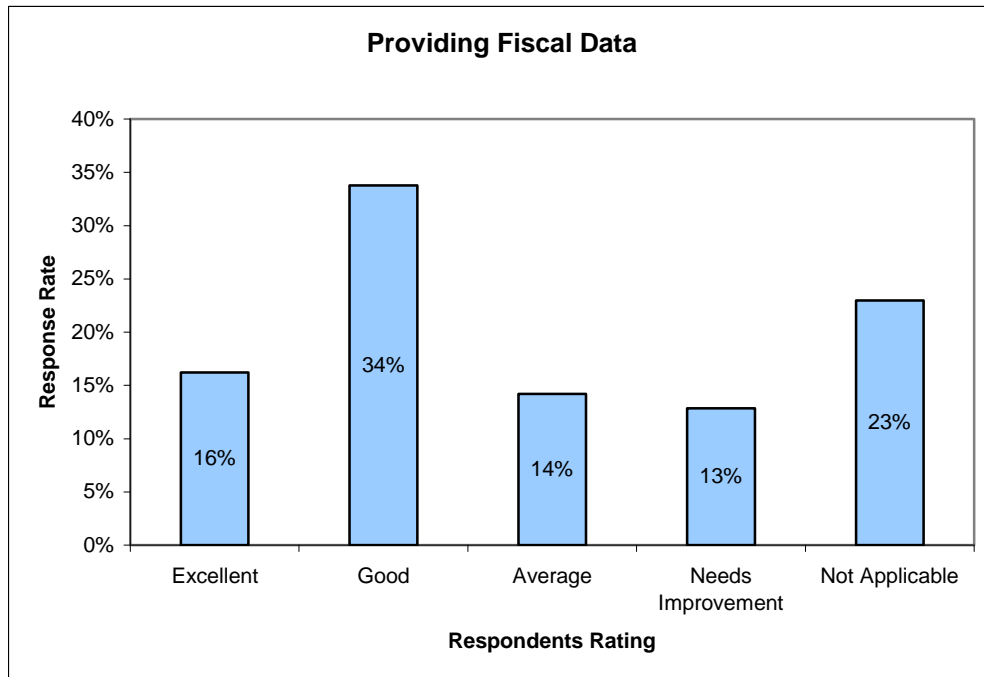
Response: In the sample of 148 respondents, 20% of respondents rated the service of processing BTA's as "Excellent"; 42% rated as "Good"; 16% rated as "Average"; 12% considered that it "Needs improvement".



I. District Budget Office Services

Question 1-c. Please rate the service of providing historical fiscal data to assist colleges and district offices in managing their budget and expenditures by the District Budget Office.

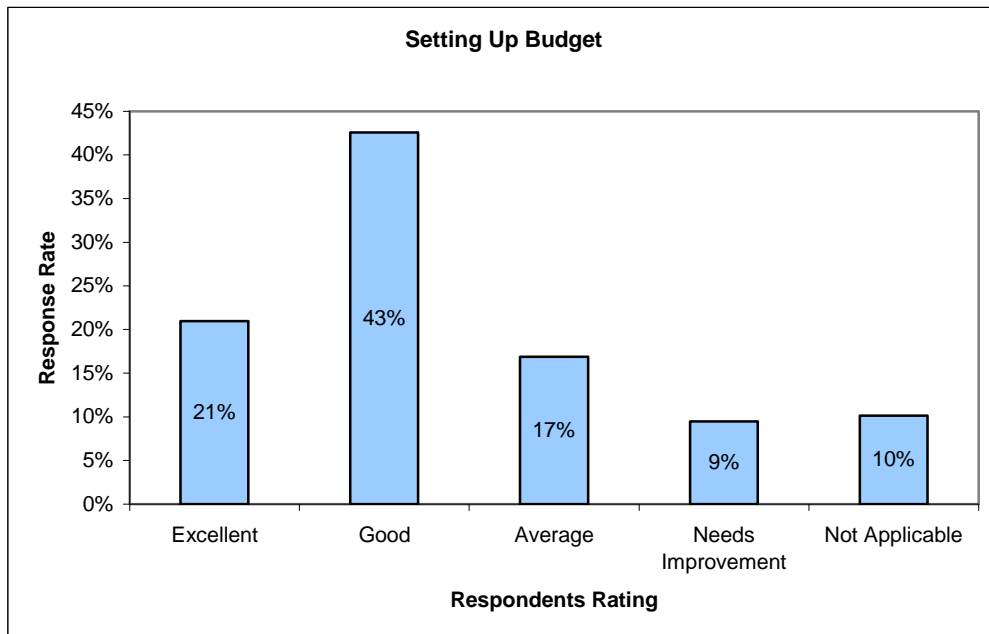
Response: In the sample of 148 respondents, 16% of respondents rated the service of providing historical fiscal data as “Excellent”; 34% rated as “Good”; 14% rated as "Average"; 13% considered that it "Needs improvement".



II. Budgeting Processes

Question 2-a. Please rate the budget process of clear guidelines and instructions for setting up budgets.

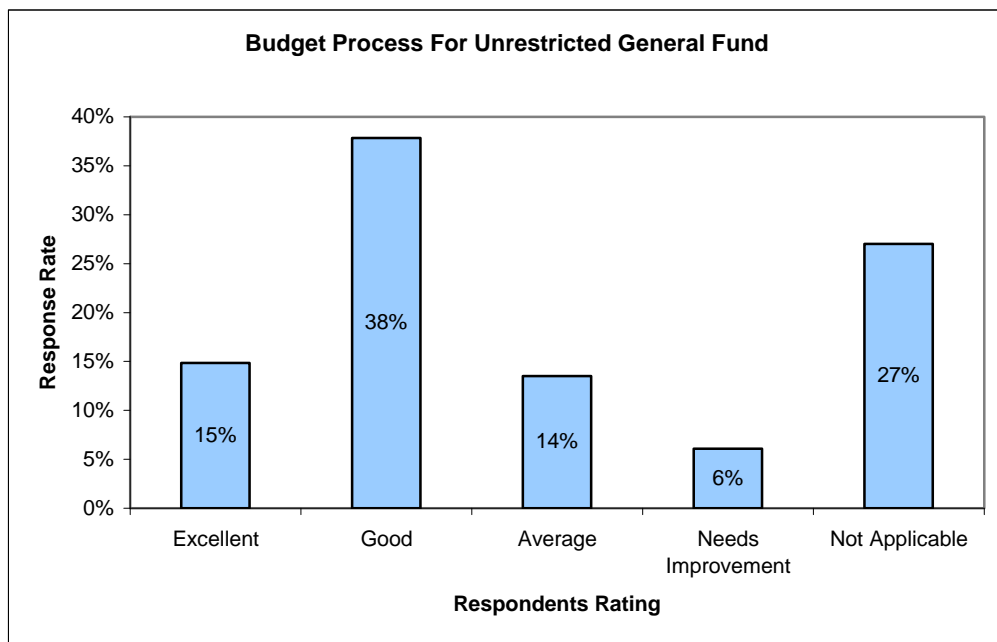
Response: In the sample of 148 respondents, 21% of respondents rated the budget process of setting up budgets as “Excellent”; 43% rated as “Good”; 17% rated as "Average"; 9% considered that it "Needs improvement".



II. Budgeting processes

Question 2-b. Please rate the budget process for unrestricted general fund programs by the District Budget Office.

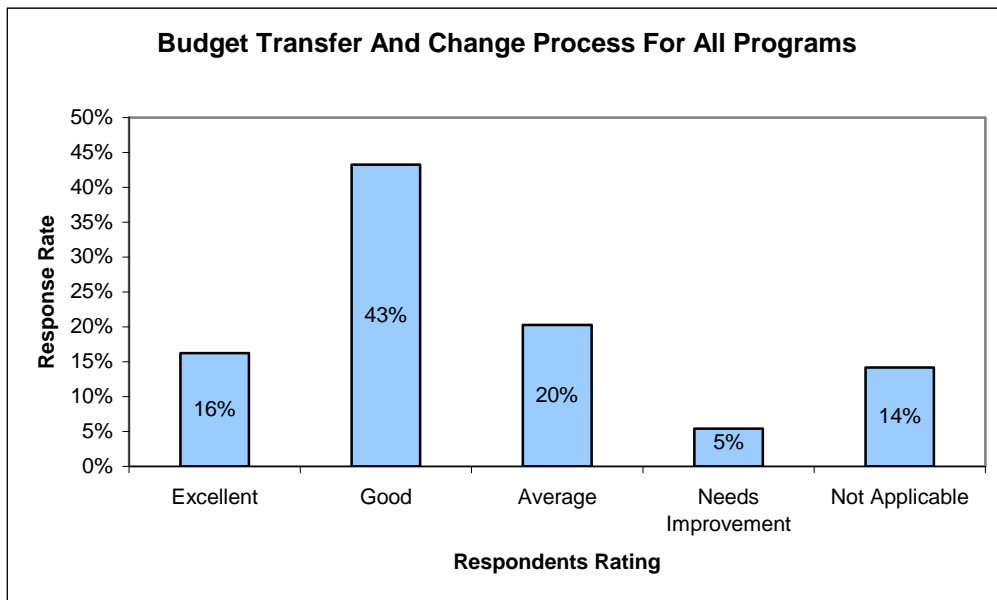
Response: In the sample of 147 respondents, 15% of respondents rated the budget process for Unrestricted General Fund as “Excellent”; 38% rated as “Good”; 14% rated as "Average"; 6% considered that it "Needs improvement"..



II. Budgeting Processes

Question 2-c. Please rate the budget transfer and change processes for all programs by the District Budget Office.

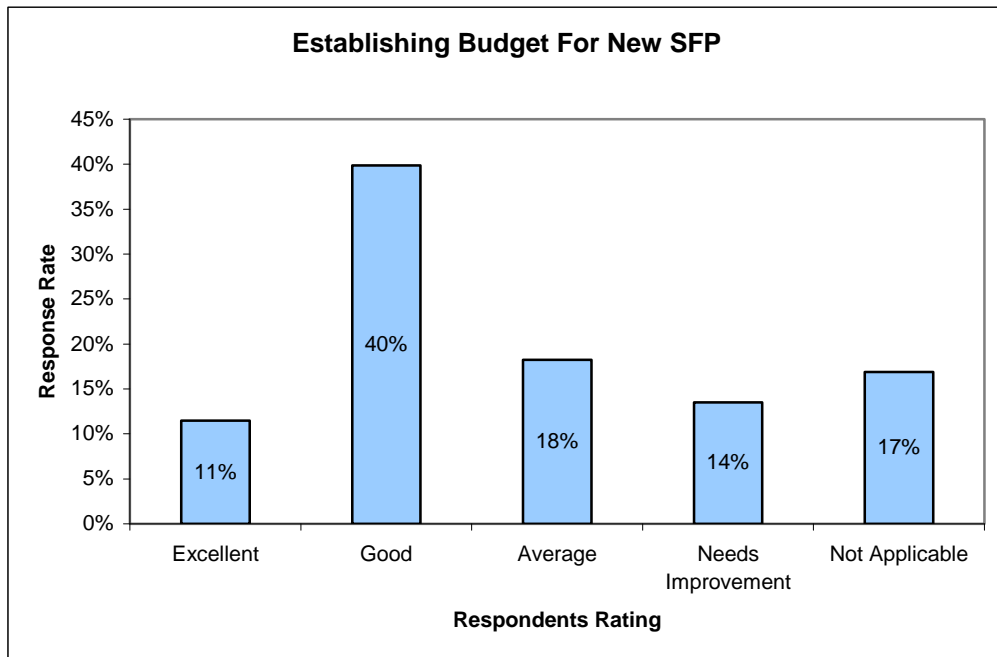
Response: In the sample of 147 respondents, 16% of respondents rated the budget transfer and change process for all programs as “Excellent”; 43% rated as “Good”; 20% rated as "Average"; 5% considered that it "Needs improvement".



III. Grants Management Process

Question 3-a. Please rate the process of establishing budgets for new SFP programs by the District Budget Office.

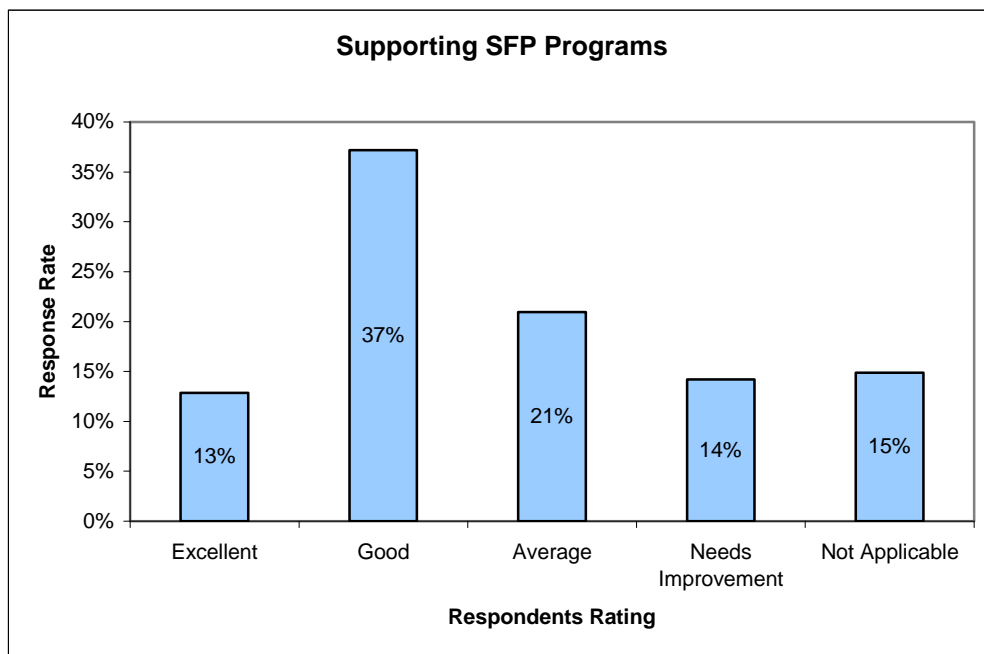
Response: In the sample of 148 respondents, 11% of respondents rated the service of establishing budgets for new Specially Funded Programs as “Excellent”; 40% rated as “Good”; 18% rated as "Average"; 14% considered that it "Needs improvement".



III. Grants Management Process

Question 3-b. Please rate the service of supporting restricted and SFP programs by the District Budget Office.

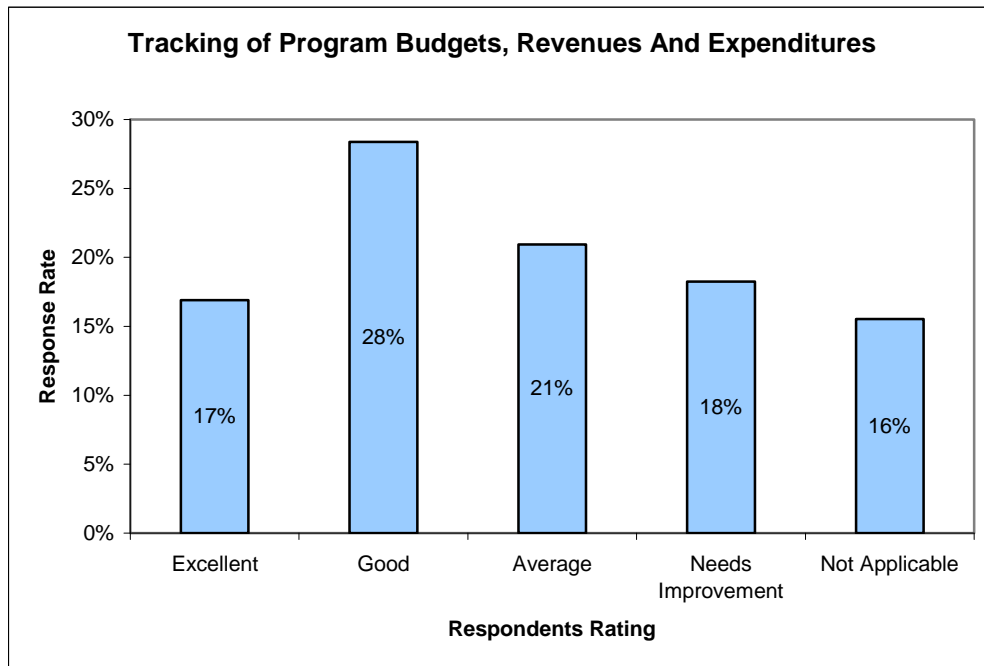
Response: In the sample of 148 respondents, 13% of respondents rated the service of supporting Specially Funded Programs as “Excellent”; 37% rated as “Good”; 21% rated as "Average"; 14% considered that it "Needs improvement".



III. Grants Management Process

Question 3-c. Please rate the service of tracking program budgets, revenues and expenditures by the District Budget Office.

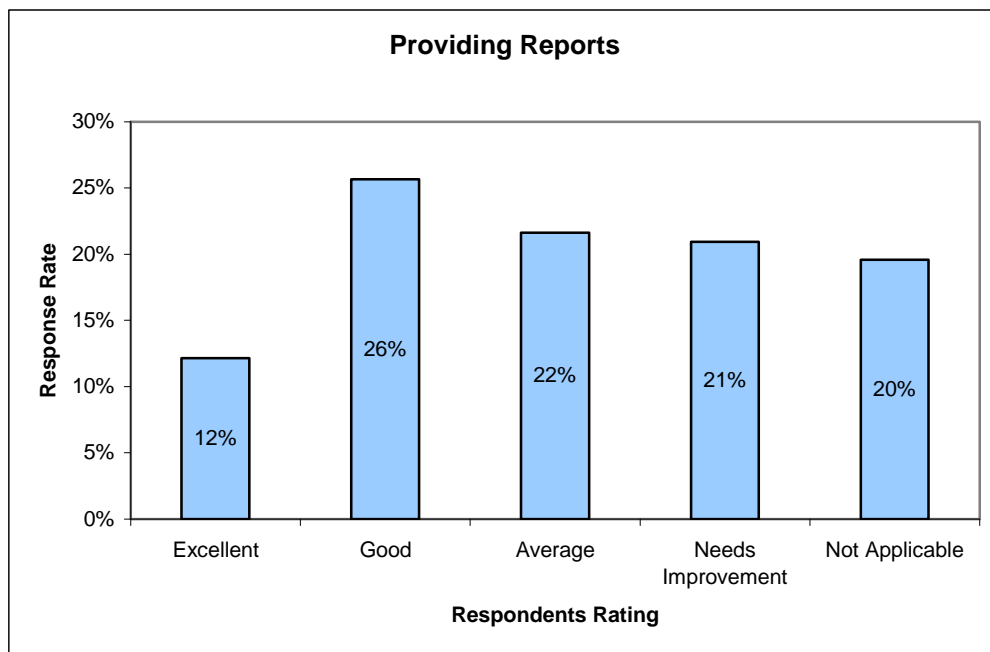
Response: In the sample of 148 respondents, 17% of respondents rated the service of tracking program budgets, revenues and expenditures as “Excellent”; 28% rated as “Good”; 21% rated as "Average"; 18% considered that it "Needs improvement".



III. Grants Management Process

Question 3-d. Please rate the service of providing reports to assist colleges and program managers in managing their budgets.

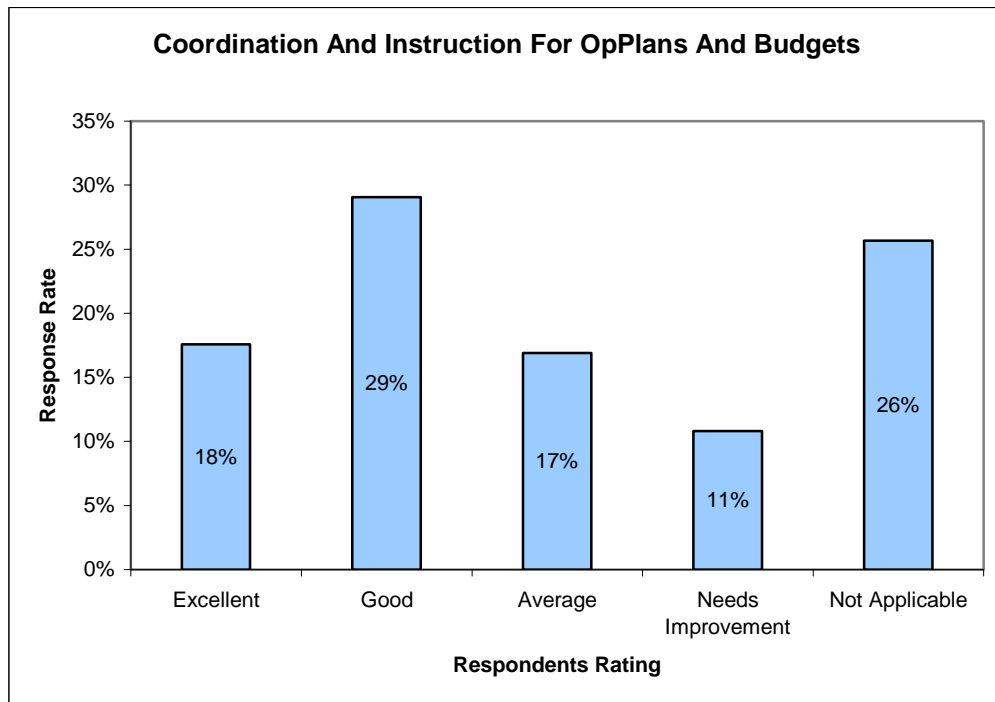
Response: In the sample of 148 respondents, 12% of respondents rated the service of providing reports as “Excellent”; 26% rated as “Good”; 22% rated as "Average"; 21% considered that it "Needs improvement".



IV. Budget Preparation and Training

Question 4-a. Please rate the service of providing coordination and instruction in the development of college and/or district office operational plans and budgets by the District Budget Office.

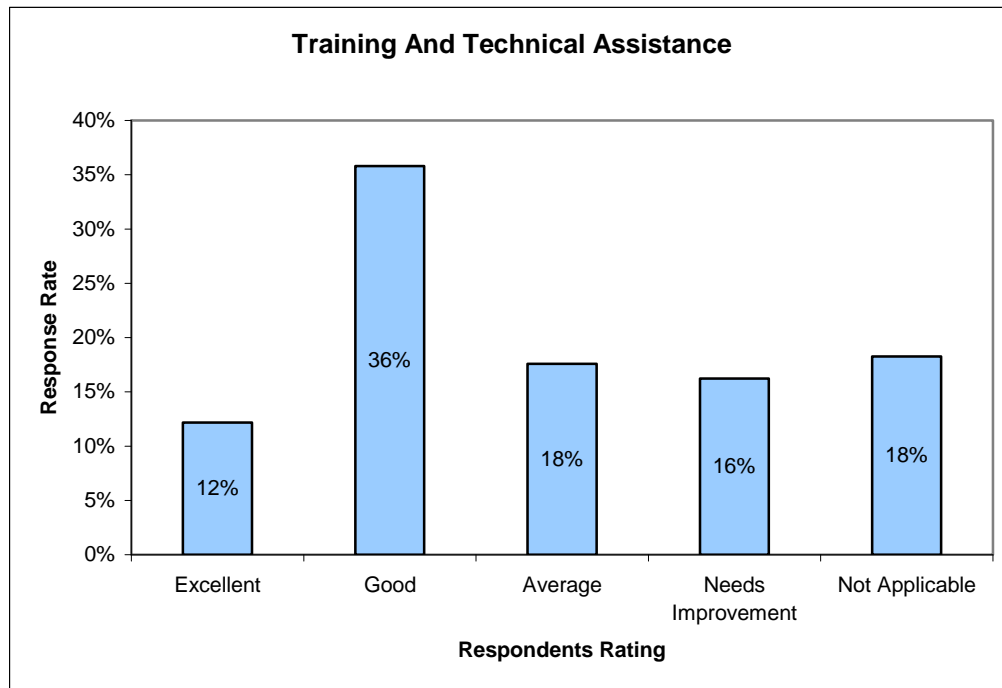
Response: In the sample of 148 respondents, 18% of respondents rated the service of coordination and instruction of Operational Plans and Budgets as “Excellent”; 29% rated as “Good”; 17% rated as "Average"; 11% considered that it "Needs improvement".



IV. Budget Preparation and Training

Question 4-b. Please rate the service of providing sufficient training and technical assistance to college and/or district office budget staff by the District Budget Office.

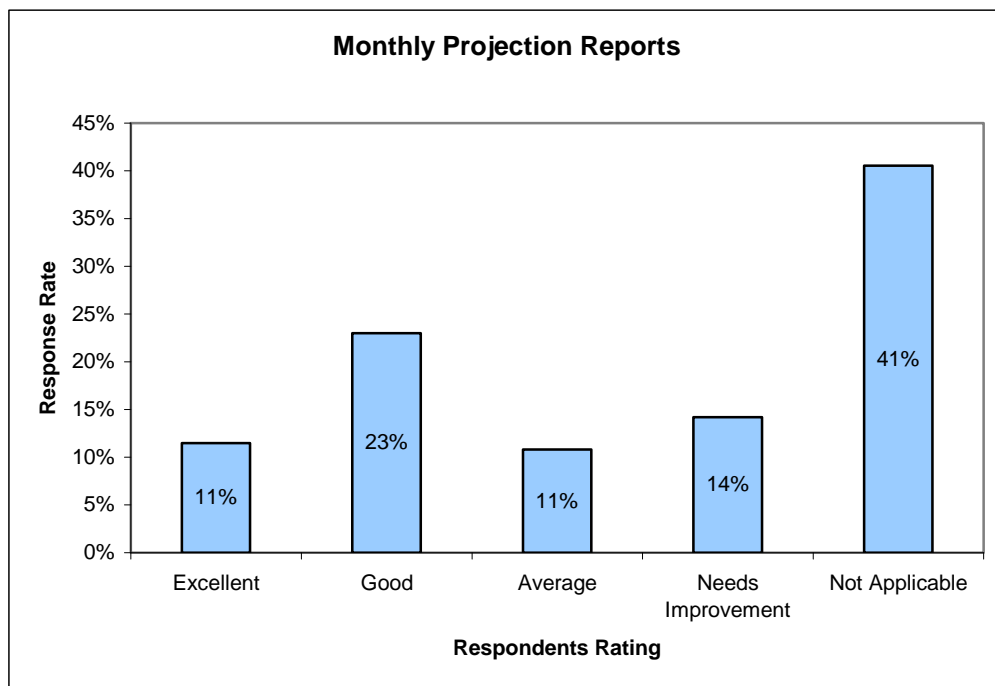
Response: In the sample of 148 respondents, 12% of respondents rated the service of training and technical assistance as "Excellent"; 36% rated as "Good"; 18% rated as "Average"; 16% considered that it "Needs improvement".



V. Report Analysis

Question 5-a. Please rate the way the District Budget Office reviews and analyzes the Monthly Projection Report for your location.

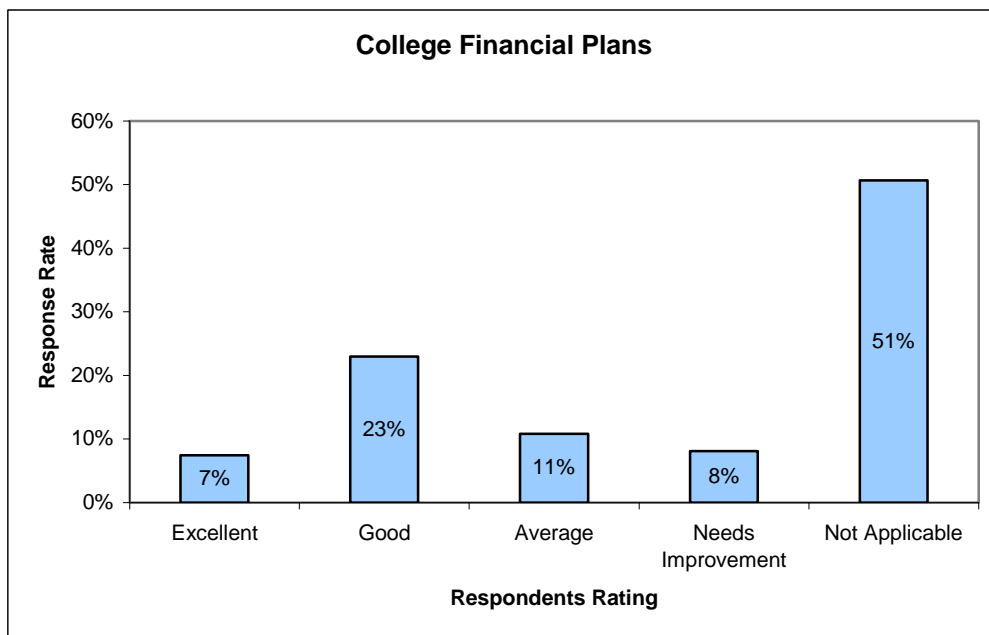
Response: In the sample of 148 respondents, 11% of respondents rated the Monthly Projection Reports as “Excellent”; 23% rated as “Good”; 11% rated as "Average"; 14% considered that it "Needs improvement".



V. Report Analysis

Question 5-b. Please rate the way the District Budget Office reviews and analyzes the College Financial Plan for your location.

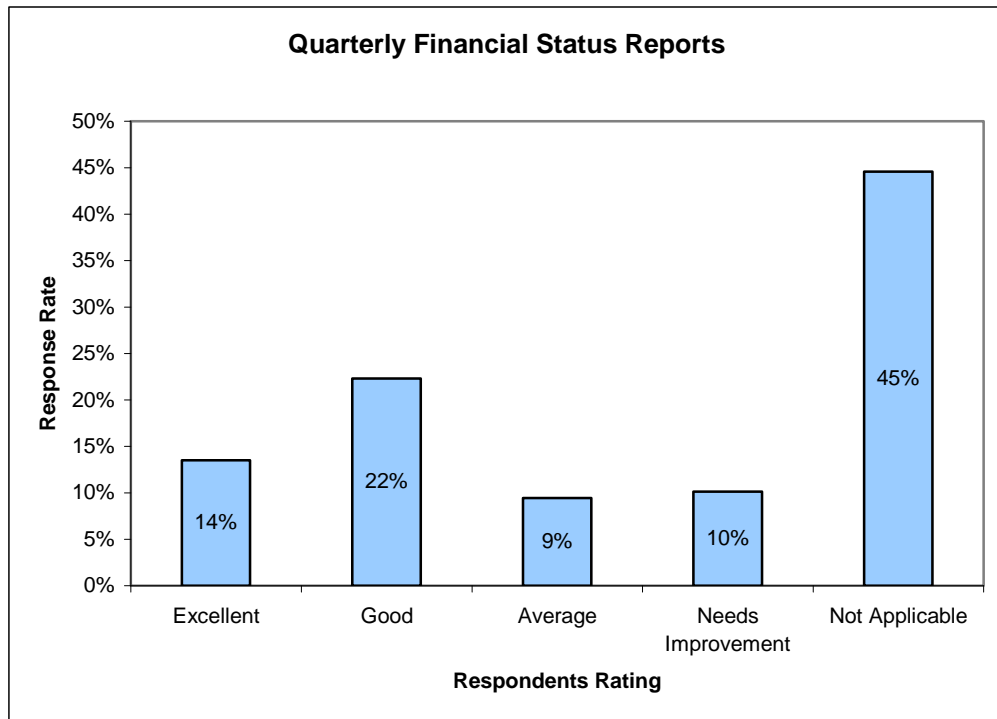
Response: In the sample of 148 respondents, 7% of respondents rated the College Financial Plans as “Excellent”; 23% rated as “Good”; 11% rated as "Average"; 8% considered that it "Needs improvement".



V. Report Analysis

Question 5-c. Please rate the way the District Budget Office reviews and analyzes the Quarterly Financial Status Reports for your location.

Response: In the sample of 148 respondents, 14% of respondents rated the Quarterly Financial Status Reports as “Excellent”; 22% rated as “Good”; 9% rated as "Average"; 10% considered that it "Needs improvement".



Comments and Suggestions from Respondents

I. College Presidents

- 1) *I think the Budget Office does a good job within our current system so I have no criticism of any of the people, all of whom who are responsive and helpful. Yet we need a new system since there is a wide gap between DO and the colleges on budgeting. The current dollar-based budgeting gives the DO or the college very little capability of managing a budget in real time. My consistent recommendation is to shift to a position-control based budget that many large college systems use. 80% of the budget is in the class schedule and until there is a section-control budget, we will just be wandering around at the campuses.*
- 2) *Major contracts and expenditures going for Board Approval and college campuses are not aware.*
- 3) *As president I'm getting my information primarily from college staff and only deal directly with the budget office with regard to reports provided.*
- 4) *I find your questions very difficult to answer since I am not the primary person to carry out these functions. You are polite when I call or email and I see lots of reports but it seems that perhaps a statement of your goals as they relate to my college which I could then evaluate would be a better way for me to give input. For example: Provide explanations and technical assistance on budget processes. This is a goal that I could support.*

II. Vice Presidents

- 1) *We need to know who is the responsible person for each budget in accounting and budget offices, when we send over JV's and BTA's.*
- 2) *Yes, please reduce the time for establishing budget for new SFP programs.*
- 3) *Sometimes the deadlines overlap and we are working on two reports at the same time. It seems unnecessary to do a monthly report during the same time the quarterly report is due.*
- 4) *More reliably process the Bookstore accounting and sales reports. This has been a problem for years.*

III. Specially Funded Program Directors and Managers

- 1) *It takes months for transactions to be completed.*
- 2) *The budget process isn't too bad. The problem lies in getting a contract initiated so that the budget can go online. This is a common complaint that I have heard from many of my fellow Chairs and grant directors. I have managed several over the years and it is nerve wracking to get this completed. I see this process as link with the budget implementation so feel you cannot separate this from your survey.*
- 3) *I know it sounds crazy but the excel spreadsheets are set up in such a way that it is difficult to include meaningful verbal data and reports. Maybe making them larger and allowing more space would be helpful?*
- 4) *It seems very difficult to get information about charges to our SFP budgets. When we do not agree with what is showing on our budgets, it is near impossible to get answers to how you reach the figures you do. There is never an explanation that makes any sense. We need to have access to screens, such as benefits, that will show how you reach the figures you come up with. We are being charged and charged and charged - we can't follow, and you can't explain very much to us. It is very frustrating! Example - When my screen shows a cost distribution center for a salary - an SFP budget - you will be charging another budget. If I can't see what you are doing, I can't fix it. Changes are very, very slow. It seems some issues are never cleared up - they just keep building on themselves and become chaos.*
- 5) *Expenditure reports I am not sure about the last question, because I do not think we get these reports.*
- 6) *It is difficult to complete quarterly reconciliation reports required by funding source when six months later the charges are still not correct.*

- 7) *The Operational Plan is a waste of time and does not help with managing a program throughout the year. Salary Distribution reports are pointless because they give information on a full month basis, but paychecks are from the 23rd to the 24th for example, and reconciling this is a major problem. Budget tracking with SAP is extremely challenging. Yearend carryovers can take too long to post. ADGs are often posted to the wrong GL account and the budget office will not clean it up. Benefit charges per month fluctuate wildly from month to month, even when salary expenses are fairly flat. They're completely unpredictable and there's no way to track if they are correct.*
- 8) *We need to develop a faster method to see changes in our budget whenever revisions to our allocation have been made. The turn around time before we see the change to our budget is too slow.*
- 9) *Continue to offer support for SFP programs.*
- 10) *The turnover is High in this area (SAP) so you always are dealing with new people who have half information, the college makes you do your own accounting even if it is not your field of expertise. The College nor the District gives clear and consistent directions.*
- 11) *I would like to express my special appreciation to Mee Lane Kyon, Robert Medina, Kyle Navasard and Jose Mendoza for a great job they are doing!!! thank you!!!*
- 12) *A consistent system wide training and/or updated written policy and procedures would be greatly appreciated. Some recent efforts for SAP training have occurred, but it is difficult to attend at the District Office.*
- 13) *processing of documents in a timely manner*
- 14) *It is still taking 4 to 6 weeks to have the budget for the new year of a continuing program put into SAP. The system is still coming up with*

charges from previous years for various categories. Our programs are not able to absorb charges from past years.

- 15) Most of my information for the FKCE program comes from my Business Office. Most of my requests are handled by them in a very efficient manner. Vera and Lolita are my contacts and provide the budget information required of the program. The only contact I have with the district is when problems. I also have problems with having my programs entered. Just recently, my program for foster youth sat on someone's desk for a month and a half. The individual said he had not received my Data Sheet for the program even though one was sent to the district with the budget. If I hadn't called, it would still be sitting there.*
- 16) One of the major problems is that there seems to be a disconnect between what we think and can show we spent and what district thinks we have spent. This causes considerable dissonance.*
- 17) The SAP system was never designed to handle the unique time-specific needs of grants and grant programs. It is not the correct software for any SFP programs and their budget management.*
- 18) Need more training for SFP programs - specifically for new managers on managing budgets and budget processes.*

IV. Budget Users

- 1) *For budget purposes, colleges need a single, reliable resource for accurate and timely full-time equivalent faculty (FTEF), regular, hourly and total, by discipline, department and campus. As part of the same resource, some measurement of instructional productivity (e.g. average class size, FTES, WSCH/FTEF, etc.) is also needed. Best source would not be District Budget Office but perhaps Educational Support Services Division.*
- 2) *I would like to suggest an improvement to Attachment II of College Financial Plan to assist the college with the reconciliation of FTEF and more accurate projection of instructional costs.*
- 3) *Sometimes when we send e-mail, either the response is not timely or no response at all....at its worst....no acknowledgement. (either you got it, will work on it or answer not available or cannot help or be of service at all..) You see, when we at the campus write to District Office, it means we do need you to respond...it could be a matter of real importance to us here at the Campus where Operations do not at all stop...constant answering/assisting students, faculty and all staff and the public.*
- 4) *Still unable to balance the first page of the Monthly Projection Report with the Summary page.*
- 5) *More general information about SFP programs should be readily available. A summary should be provided for each SFP stating its purpose, goals and restrictions.*
- 6) *Some of the reports are more geared toward senior staff than for those in the trenches and too closely resemble the ones I can get in ZLAC or BW with just a few clicks of my mouse (duplication). I need more info in my reports to understand where our department stands financially ...though I use your reports for comparison. On a personal note, your people are very knowledgeable and, in general, always willing to help.*

V. Other Areas of Responsibility

- 1) *Salary and employee benefit charges reports are not shown in detail or in a timely manner on district reports. Employee benefit charges are extremely high when compared to the district instructed percentage rates at the beginning of the year operational plan. Benefit charges are difficult to reconcile with office records. I have had a positive and professional experience working with district's budget office when processing budget transfers. Jose and Hattie are very professional and pleasant regardless of the overload of work they may have. Thank you.*
- 2) *Sometimes it takes an excessive amount of time to be given a program number for grants that are ongoing, but must be renewed annually.*
- 3) *There were two taskforces established-one for SFP and one for categorical programs to help bring the college operation and district operation together. I have not heard of meetings recently, but continuing this taskforce to its conclusion would help to improve communication and coordination between the college and district operations.*
- 4) *The only issue that comes up is on the final quarterly report. Never shows actual expenditures. I am able to work with the District assigned person and we troubleshoot – this is more of a positive, not a concern.*
- 5) *I have difficulty finding out the exact benefits for all employees.*
- 6) *I would like to see a more service oriented approach and collaborative style employed in the budget office.*
- 7) *In my position I get all of the Budget information from the Vice President of Administrative Services. I have not had any contact with the district budget office.*

- 8) *My experience has been setting up budgets for SFP grants and then monitoring expenditures to the program. I have found that it takes an exceptionally long time from when I submit the paperwork until I receive the completed BTA with the program number assigned. I'm not sure if the delay is on campus or where, but receiving the BTA is the only way I know the new program number and that funds are in place.*
- 9) *Monthly Comm Svcs Income & Expenditure: Would it be possible to go back to having each object code listed out (like in the old days =>) instead of lumped together? (ie: 452100, 453100, 562100, 552200, instead of 400000 and 500000).*
- 10) *The District Office Budget team does a great job. My experience is that veteran campus employees make the process ineffective and difficult because they don't respond positively to change.*
- 11) *Posting of expenditures need to be more timely, i.e. May & June as to not spillover into new fiscal year.*
- 12) *Having SFP expenditures reports before due date to the state.*
- 13) *The district needs to use the SAP system for all data and all reporting so that report data matches. It is extremely difficult to sync the reports and understand why the variances. There should be a way to do all of our projections etc in SAP. It might cost some, but in the long run it would be most efficient and beneficial to the process, both in time and costs.*
- 14) *Training in budget processes and related computer systems would be most helpful.*
- 15) *The Budget Office is excellent in assisting the colleges. Most of them are quick to respond and help. I had few occasions where one person did not respond to my e-mails and I always have to send a second e-mail to follow up.*

- 16) *Help us get our Admin Support funds from SFPs in a timely manner.*
- 17) *The district should be a vital resource to the colleges and the development components on the campus, since we bring in additional funding for programs, but instead I sense that our office creates more workload for district staff. Bringing in more external funding should be celebrated and supported and not looked upon as an annoyance. The district is so far removed from the classroom and the heartbeat of the good work that is done at the colleges. We need the district staff to visit the colleges more and work side by side with SFP directors to develop a stronger and more collegial atmosphere. Additionally, we have to keep in mind, the budget office handles accounting but is not delegated with the actual decision making of expenditures, since there is a process for that through district and college leadership. Budget decision should be aligned with research and planning and the mission and goals of the college and I would suspect that the District budget office does not spend time with mission statements of colleges and district.*
- 18) *I would like the Chancellor and Presidents to know that we need more help for your office. I am concerned about the tremendous work load that some of you are under as we add more and more Specially Funded Programs.*

Appendix I.
Survey Form

BUDGET AND MANAGEMENT ANALYSIS - SERVICES SATISFACTION

The District Office of Budget and Management Analysis coordinates the allocation of resources to achieve the District's educational mission by:

- 1) developing and maintaining the District's budget and financial plan in conjunction with colleges;
- 2) supporting the Board, administration and District Budget Committee decision-making processes with revenue and expenditure projections and analyses; and
- 3) complying with County, State, and Federal fiscal reporting requirements.

The Office has responsibilities in the preparation and development of the District and college budgets; in the operations and maintenance of the District's budget throughout the year; in providing instructions and guidelines for colleges to develop their budget operations plans; and in monitoring college financial plans, and monthly and quarterly financial status projections.

This survey is to assess and evaluate the functions and services currently provided and to identify areas that could be improved, changed, or enhanced. Please take a few minutes to complete this survey on the quality of service we provide. We welcome your feedback and appreciate your honesty.

At which college/location do you work?

What is your area of responsibility?

President

Vice President of Administration

SFP Program Director/Manager

Budget/Business Office User

Other (please specify)

Please rate the following services provided by the District Budget Office:

	Excellent	Good	Average	Needs Improvement	Not Applicable
a) Responding to budget inquiries	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) Processing budget transactions (new budgets, transfers, and changes)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) Providing historical fiscal data to assist colleges and district offices in managing their budget and expenditures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please rate the following budgeting processes:

	Excellent	Good	Average	Needs Improvement	Not Applicable
a) Clear guidelines and instructions for setting up budget	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) Budget process for unrestricted general fund programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) Budget transfer and change processes for all programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

BUDGET AND MANAGEMENT ANALYSIS - SERVICES SATISFACTION

Please rate each of the following elements of the Grant's Management Process (Specially Funded Programs/Categorical Programs)

	Excellent	Good	Average	Needs Improvement	Not Applicable
a) Establishing budget for new SFP programs	jñ	jñ	jñ	jñ	jñ
b) Supporting the restricted and SFP programs	jñ	jñ	jñ	jñ	jñ
c) Tracking of program budget, revenues and expenditures	jñ	jñ	jñ	jñ	jñ
d) Providing reports to assist colleges and program managers in managing their budgets	jñ	jñ	jñ	jñ	jñ

Please rate the following services provided by the District Budget Office.

	Excellent	Good	Average	Needs Improvement	Not Applicable
a) Providing coordination and instruction in the development of college and/or district office operational plans and budgets	jñ	jñ	jñ	jñ	jñ
b) Providing sufficient training and technical assistance to college and/or district office budget staff	jñ	jñ	jñ	jñ	jñ

Please rate the way the District Budget Office reviews and analyzes the following reports of your location budget:

	Excellent	Good	Average	Needs Improvement	Not Applicable
a) Monthly Projection Reports	jñ	jñ	jñ	jñ	jñ
b) College Financial Plans	jñ	jñ	jñ	jñ	jñ
c) Quarterly Financial Status Reports	jñ	jñ	jñ	jñ	jñ

Do you have any particular issues or concerns that you would like the District Budget Office to address first?

BUDGET AND MANAGEMENT ANALYSIS - SERVICES SATISFACTION

Thank you for completing this survey. Your answers are much appreciated.