To: Fiscal Agent Network Group

Re: Campus Assessment of Training and Reporting Needs and Process Evaluation

From: Assessment Team, comprised of:

Terry Shoebotham, Business Management Specialist, HSC Financial Services
Barbara West, Manager, Contract & Grant Accounting
Keith Webster, Accountant III, General Accounting, Financial Services
Lorrie Black, ERP Functional Support Manager, Finance Systems Management
Susan Smith, Financial Analyst, Finance Systems Management

Introduction:

Our team has been requested by executive leadership to conduct group interviews which will assess the training/reporting and process improvement needs of the Finance community. The results of these interviews will be the basis for analysis, development, and implementation of various solutions to address the concerns expressed. It is the focus of this team to involve the Finance community throughout this process to ensure efficient and effective results.

Topic for discussion:

The intent is to keep the discussion as open as possible, with the focus being on the individuals that perform the day to day Finance functions throughout campus. We would like to hear the concerns of the individuals processing Finance transactions to target areas within various processes, training provided, and reporting available that need refinement. Such topics for discussion could include:

I. Processes:
   a. Difficulties in providing supporting documentation for transactions?
   b. If a question comes up, where to go for help?
   c. Aware of resources available to answer questions?
   d. How would you like changes in procedures communicated to campus?

II. Training
   a. How could training be provided in a more user friendly fashion?
   b. Is there additional training that can be provided?
   c. What training would help you best perform your functions?

III. Reporting
   a. What reports/reporting tools do you find most useful? Least useful?
   b. Do you know what reports/reporting tools are available to you? How to read them and use them to assist in performing daily functions?
   c. What format/types of reports/reporting tools would be most helpful to you?

Timeframe:

The assessment team will be canvassing the Finance population at various departmental and networking monthly meetings (including School/College Administrators and the Research Administrator's Network) held during February and early March to gather the information for analysis. The assessment team will then analyze the results, and return to these meetings to confirm our understanding of the needs expressed. After that, planning and development of solutions will begin, with updates being provided regularly through this process to the Finance community (attending monthly meetings, website updates, email updates, newsletters etc.).

Thank you for your time, we intend to use this process to add significant value by refining our environment to facilitate the needs of the Finance community. We look forward to hearing from you.