



# Program Review

## Purpose

*“Program review is the process through which constituencies (not only faculty) on campus take stock of their successes and shortcomings and seek to identify ways in which they can meet their goals more effectively. It is important to note here that the task of identifying evidence-based successful practices, and sharing these practices college-wide, is far more important than the negative perspective of trying to ferret out ineffective practices” – Academic Senate for California Community Colleges*

## Data Driven Decision Making

*Continual improvement  
Evaluation of program resource needs  
Fiscal stewardship and transparency  
Culture of evidence*

## Reporting Cycle

Program Review will be conducted every two years beginning Fall semester 2021.

Reporting Cycle Activities	Timeline
Program Review forms posted on the <a href="#">Program Review website</a> :	August 22, 2023
Data is available on the ORPIE website:	
<ul style="list-style-type: none"> <li><a href="#">Instructional Program Review Dashboard</a></li> </ul>	Available now
<ul style="list-style-type: none"> <li>Student Services Program Review Dashboard</li> </ul>	Coming August 28, 2023
<ul style="list-style-type: none"> <li>State comparison data may be found on <a href="#">Data Mart</a> or <a href="#">Cal-Pass Plus</a></li> </ul>	Available now
Program Review Office Hours and Data Support offered in a hybrid format in the Language Arts (LA) Room 115 and by zoom.	See the Program Review website schedule information.
Program Review draft due via Dynamic Forms.	Friday, October 6, 2023
Review and Feedback Steps to Finalize Program Review:	
<ul style="list-style-type: none"> <li>Step 1a: <b>Technical Review</b> by IEC (for all) and Academic Senate (for any that include a faculty request).</li> <li>See the technical review rubrics.</li> </ul>	Friday, October 6, 2023
<ul style="list-style-type: none"> <li>Step 1b: <b>Content Review</b> by Deans/Director. Feedback due to author.</li> </ul>	Friday, October 6, 2023
<ul style="list-style-type: none"> <li>Step 2: <b>Completed Revisions</b> submitted by author for final approvals by Deans/Manager and Vice Presidents. Final draft will address technical and content review feedback.</li> </ul>	Friday, November 3, 2023
<ul style="list-style-type: none"> <li>Step 3: <b>Final Program Review Approvals</b> by Deans/ Manager, Vice Presidents, and IEC. ORPIE will post final draft to the website.</li> </ul>	Friday, December 1, 2023
<ul style="list-style-type: none"> <li>Step 4: Funding Requests proceed through governance structure.</li> </ul>	
<ul style="list-style-type: none"> <li>Depending on the request either the Vice President or the IEC will assign the Program Review to the appropriate committee(s), including Planning Council for prioritization.</li> </ul>	Friday, December 1, 2023
<ul style="list-style-type: none"> <li>Committees forward recommendations to the Budget Committee</li> </ul>	Friday, December 1, 2023

• Faculty Hiring timeline:	
• Academic Senate Q&A	Tuesday, November 14, 2023
• Senator Ratings due	Friday, November 17, 2023
• Academic Senate – Special Meeting to Review Rankings	Tuesday, November 28, 2023
• Prioritized requests for faculty positions will be provided by the Academic Senate to the Executive Team	Wednesday, November 29, 2023
<ul style="list-style-type: none"> <li>▪ President makes final faculty decisions and reports to Senate at Special Meeting.</li> <li>▪ Based on approved faculty positions, faculty submit search committee membership and supplemental questions to HR and the Academic Senate.</li> </ul>	Tuesday, December 5, 2023
• Hiring committee participants appointed by the Academic Senate.	Tuesday, December 12, 2023
• The Budget Committee forwards all recommended non-faculty requests to the Executive Committee	Tuesday, December 12, 2023
• President announces all funded recommendations campus-wide	Monday, April 1, 2024

## AUTHOR INFORMATION

Employee ID (E# or C#):  First Name  Last Name   
Wing  Email Address  Office Phone

Dean/Manager First Name  Last Name  Email   
Vice President First Name  Last Name  Email

### Program Review - Draft

\*Program Review - Fiscal Services 2023  
1006.docx

### Program Review - Final Submission

\*Program Review - Fiscal Services 2023  
1103.docx

This Program Review includes the following:

*Pick all that apply.*

**If the answer was "Yes" but one of the following is not picked it will affect the form's workflow and you will have to resubmit.**

Faculty Request

Facilities, Technology, Equipment Request

Classified Request

This Program Review includes the following:

*Pick all that apply.*

**If the answer was "Yes" but one of the following is not picked it will affect the form's workflow and you will have to resubmit.**

Faculty Request

Facilities, Technology, Equipment Request

Classified Request

Faculty Requests (up to 3)  
*One upload per request*

Faculty Upload1  
Faculty Upload2  
Faculty Upload3

Faculty Requests (up to 3)  
*One upload per request*

Faculty Upload1  
Faculty Upload2  
Faculty Upload3

Facilities, Technology or Equipment Draft Requests (up to 5)

- FTE Upload1
- FTE Upload2
- FTE Upload3
- FTE Upload4
- FTE Upload5

Facilities, Technology or Equipment Update Requests (up to 5)

- FTE Upload1
- FTE Upload2
- FTE Upload3
- FTE Upload4
- FTE Upload5

Classified Personnel Draft Requests (up to 3)

One upload per request

- Classified Upload1  
Program-Review-Request-for-Funding-2023-24-Classified-Personnel Fiscal Services 2023 1006.docx
- Classified Upload2
- Classified Upload3

Classified Personnel Updated Requests (up to 3)

One upload per request

- Classified Upload1  
Program-Review-Request-for-Funding-2023-24-Classified-Personnel Fiscal Services 2023 1103.docx
- Classified Upload2
- Classified Upload3

Supporting Materials (Optional)

- Upload1 Accounting Analyst.pdf
- Upload2 GWC Org Chart - August 2023 Fiscal Services.pdf
- Upload3

Supporting Materials (Optional)

- Upload1
- Upload2
- Upload3

...3439363035

*Paul Wisner*

10/06/2023

Author - Draft Signature

Date

...3538393331

*Paul Wisner*

11/03/2023

Author - Final Signature

Date

Dean/Manager Draft Feedback

FileUpload2

IEC Feedback

Personnel request form is missing Program Needs, College Priority, Contributions to the College, and hourly narratives. Consider addressing the number of days that requisitions are in Bursar's queue. Is 6.4 days good for the department? Can it be shortened?

FileUpload4

Program Review Rubric Upload

Academic Senate Executive Board Feedback

FileUpload1

Program Review Rubric Upload

Dean/Manager Final Feedback

FileUpload2

...3333303431

*Rick Hicks*

Dean/Manager Signature

11/06/2023

Date

Vice President Feedback

Empty feedback box with scrollbars

FileUpload3

...3936323436

*Rick Hicks*

Vice President Signature

11/06/2023

Date

Downloaded to the following Committee Teams folder on:

-- Choose --

Empty text box

...3734363836

*Lauren Davis-Losenko*

IEC Signature

12/01/2023

Date

Dean/Manager -  
Feedback Signature

Electronically signed by Rick Hicks on 11/01/2023 9:05:24 AM

Academic Senate:  
Technical Review  
Signature

Signature not required

Academic Senate  
Signature

Signature not required

IEC: Technical Review  
Signature

Electronically signed by Kay Nguyen on 10/20/2023 7:12:29 AM



# Program Review Request

## Administrative Services – Fiscal Services

### Program Review Purpose

*“Program review is the process through which constituencies (not only faculty) on campus take stock of their successes and shortcomings and seek to identify ways in which they can meet their goals more effectively. It is important to note here that the task of identifying evidence-based successful practices, and sharing these practices college-wide, is far more important than the negative perspective of trying to ferret out ineffective practices” –Academic Senate for California Community Colleges, 2009*

### DATA

<b>Number of checks issued in 2022-2023:</b>	1,498
<b>Number of purchase orders issued in 2022-2023:</b>	Banner (Requisitions) - 813 GP - 328
<b>Number of deposits made in 2022-23:</b>	Banner - 164 GP - 2,147
<b>Number of days requisitions are in Bursar’s Office queue on average in 2022-2023:</b>	Days after Requisition Created - 6.4 Days once notified (Director Queue) - 1
<b>Number of expenditure transfers completed in 2022-2023:</b>	444
<b>Training sessions offered by the Bursar’s Office and number of attendees in 2022-2023:</b>	50 training sessions Did not keep list of attendees
<b>Training emails provided to the campus by the Bursar’s Office in 2022-2023:</b>	24

<b>List the Administrative Service Outcomes (ASOs) for fiscal services:</b> <i>If you have not defined your ASOs, please describe how you will define them in 2023-2024.</i>	<ol style="list-style-type: none"> <li>1. Improve Training Program. To provide the campus with tools for better financial planning and management.</li> <li>2. Implement campuswide point of sale system. Reduce number of POS systems to reduce manual process, improve internal controls, provide quicker and more accurate reporting.</li> <li>3. Implement Auxiliary Workflow for Purchasing. Replace manual processes with electronic processes.</li> <li>4. Implement One Card System. Simplify student experience at GWC and integrate daily operations to a single card.</li> </ol>
<b>Describe how you assessed your ASOs this year? (e.g., survey, document review)</b> <i>If you have not assessed ASOs, describe your plan to assess in 2023-2024.</i>	We reviewed the activities that met our ASOs
<b>What were the findings of your ASO assessment?</b>	1. We began the Bursar's Office Hour which met seven times through out the year to provide information to staff and create a space for staff to ask question and resolve issues. We averaged 15-20 staff at each office hour.



## Program Review Request Administrative Services – Fiscal Services

	<p>2. We implemented University Tickets for the Theater, Athletic games, Criminal Justice events, and ASGWC events. We reduced the amount of cash we handled, increased the use of credit cards (less of a manual process), and deposits are getting to the bank faster.</p> <p>3. We did not implement the auxiliary Workflow. We did not have the time to implement this.</p> <p>4. We did not implement the One Card as time and cost of the project was an impediment to complete.</p>
<b>How do you plan to strengthen practices/policies to improve your outcomes?</b>	We plan to survey staff to receive feedback for the activities we completed to meet our ASOs.

<b>Outside of hiring new faculty or staff, please discuss the data trends above, and your plans for serving more stakeholders (students, employees) or improving your outcomes.</b>
We plan to review our options to leverage technology to reduce the manual processes which impact the way the campus and department processes financial transactions and review financial information. We also plan to find opportunities to reduce costs.

### PROGRAM-SPECIFIC QUESTIONS

<b>Describe the functions of fiscal services (including the Bursar's Office):</b>
<p>The role and responsibility of Business Services is to ensure the fiscal operations of the campus are planned, controlled, and accurately accounted for in the financial records. This applies to all funds, including appropriated, generated, awarded, donated, or otherwise received or spent by the Campus from any source or for any purpose. Business Services is responsible for the fiscal accountability of grants &amp; categorical programs, the \$ 106 million campus budget, \$ 25.7 million auxiliary funds including a \$ 10.5 million Foundation investment portfolio.</p> <p>Business Services assists students with the payment of registration fees, parking permits, transcripts, and other fees. We also issue gas cards and campus bookstore cards for EOPS/Care/Guardian Scholars, Puente, International Students, and Veterans. Additionally, we administer local and state awarded scholarships and third party payments to ensure tuition, books, supplies and other related items are available to the students.</p>

<b>What does fiscal services (including the Bursar's Office) do exceptionally well?</b>
<p>Fiscal integrity and accountability</p> <p>Expertise, education, and experience of staff members</p> <p>Excellence in customer service to students, staff and district employees</p>



## Program Review Request Administrative Services – Fiscal Services

### **How does fiscal services help GWC meet its mission?**

*Golden West College provides an intellectually and culturally stimulating learning environment for its diverse student population. The College provides enriching and innovative programs that help students: transfer to four-year institutions, earn associate degrees, complete certificates in career and technical education, advance their careers, and demonstrate college readiness. The College is committed to continuous assessment and improvement of student learning and institutional effectiveness.*

We provide financial processing support to these programs so student can meet their goals and objectives.

### **How can Fiscal Services (including the Bursar's Office) adapt to handle the increased volume in programs requiring additional tracking and reports?**

Since the Bursar's Office moved into the Student Services Center, we have been improving processes to meet the increased demand for our services. We have added accepting payments for student fees, accepting parking fees, disbursing gas cards, disbursing student aid and scholarships, coordinating grant and categorical programs, processing investment trades for the Foundation, coordinating University Tickets processing, and the increased demand for training.

We are currently experiencing more requests and needs for our services than we can provide. We need additional resources to meet the needs of the campus and the regulatory requirements of our funds.

We do continue to discuss opportunities to leverage technology to help us meet these needs.

### **What are the most impactful changes in processes to the Fiscal Services (including the Bursar's Office) that can improve service to students and the campus community?**

We need to move our manual processes to automatic, online processes. The travel process is one processes which could be updated to reduce the manual labor under our current travel process.

### **What are the biggest challenges facing the Fiscal Services (including the Bursar's Office) in completing its role?**

Insufficient number of staff.

Increased complexity and the number of grant and categorical funds.

Ability to provide continuous training programs for new/current campus staff.

Internal and external processes.

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## GOALS AND REQUESTS FOR FUNDING

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**Requests – If you are requesting any of the following, they MUST be addressed within your goals. These forms must be submitted separately from the Program Review.**



# Program Review Request

## Administrative Services – Fiscal Services

- Faculty
- Equipment, Facilities, Technology
- Support Staff

### GWC Strategic Plan Goals Legend

1. **Enrollment:** GWC will increase credit and noncredit enrollment while providing efficient academic programs and student services.
2. **Equity and Success:** GWC will support, enhance, and develop equity-minded services and academic programs that lead to student success.
3. **Completion:** GWC will ensure students’ timely completion of degrees and certificates by providing high quality academic programs and student services.
4. **Workforce Preparation:** GWC will support student success by developing and offering academic programs and student services that maximize career opportunities.
5. **Facilities:** GWC will provide flexible, accessible, and sustainable learning environments that support the success of students, faculty, staff, and communities.
6. **Professional Development:** GWC will support the success of all employees by providing professional development opportunities that focus on the achievement of the College Goals.
7. **Communication:** GWC will effectively communicate and collaborate within the College and its communities.

### GOALS FROM PREVIOUS PROGRAM REVIEW CYCLE

*Please refer to your previous Program Review cycle and summarize all outcomes for each goal.*

**Summary and Outcomes of Previous Goals (from the last Program Review) including resource requests and if they were funded or not.**

We met two of our goals for improved training and implementing a campuswide POS system. Our request for the One Card and one additional staff member were not funded.

### GOALS FOR CURRENT PROGRAM REVIEW CYCLE

*Current goals should be connected to GWC’s Strategic Plan Goals.*

#### **GOAL 1 (Required)**

**Description of goal:**

Improve training Program

**What actions will be taken to accomplish the goal?**





## Program Review Request Administrative Services – Fiscal Services

Expand the Bursar's Office Hour to create FAQs for common training needs.

### What metric will you use to measure your goal?

The development of the FAQs and survey staff to determine if the information meets the needs of the campus.

### Which of the College's missions and goals does this goal support? (check all that apply)

- Enrollment
- Equity and Success
- Completion
- Workforce Preparation
- Facilities
- Professional Development
- Communication

### GOAL 2 (Required)

#### Description of goal:

Expand University Tickets

#### What actions will be taken to accomplish the goal?

Use University Tickets to record all Bursar's Office Transactions and reduce any duplication of efforts.

#### What metric will you use to measure your goal?

The Bursar's Office workflow should improve and deposits should be quicker to record.

### Which of the College's missions and goals does this goal support? (check all that apply)

- Enrollment
- Equity and Success
- Completion
- Workforce Preparation
- Facilities
- Professional Development
- Communication

### GOAL 3 (Required)

#### Description of goal:



# Program Review Request

## Administrative Services – Fiscal Services

Implement an electronic purchasing process

**What actions will be taken to accomplish the goal?**

Reduce the amount of time staff are involved in processing purchase orders and checks.

**What metric will you use to measure your goal?**

We will track the time staff take in the manual process and compare to the time it takes to process purchase orders and checks in the new process.

**Which of the College’s missions and goals does this goal support? (check all that apply)**

- Enrollment
- Equity and Success
- Completion
- Workforce Preparation
- Facilities
- Professional Development
- Communication

### OTHER INFORMATION

**What additional information would you like to share about your program?**

The Bursar's Office is requesting minimum of an Accounting Analyst as the needs and expertise requirements of the department have increased. We also need a counter staff member to assist students and staff with required services.

**Submitter’s Signature:** *Paul Wisner*

**Date:** 10/6/2023

**Supervisor’s Review**

As the supervisor of this program, I have reviewed this request.

- No concerns
- I have concerns

**Comments:** [Click or tap here to enter text.](#)



## Program Review Request Administrative Services – Fiscal Services

**Supervisor's Signature:** Click or tap here to enter text.

**Date:** Click or tap to enter a date.

**Vice President's Signature:** Click or tap here to enter text.

**Date:** Click or tap to enter a date.



# Program Review Request- Classified

Golden West College

## CLASSIFIED REQUEST

<b>Submitter's First Name:</b>	Paul
<b>Submitter's Last Name:</b>	Wisner
<b>Submitter's Email:</b>	pwisner@gwc.cccd.edu
<b>Submitter's Phone Number:</b>	X55195
<b>Who is your Dean/Supervisor?</b>	Click or tap here to enter text.
<b>Are you the Department Chair?</b>	Click or tap here to enter text.
<b>Who is your Vice President?</b>	Rick Hicks
<b>Program/Department:</b>	Bursar's Office

### Type of Review:

Note: Library and Counseling should submit individual Program Reviews: one for Instruction and one for Student Services.

- Instruction
- Student Services
- Administrative

## POSITION REQUEST

### Please check one of the following:

- Replacement Position (Previously funded/ not currently funded)
- New Position (Never been funded/newly created)

**Please note:** that an approved job description from the District office is required in order to complete the request form. You may not proceed with the request without the job description.

<b>If this request is for a replacement, how long has the position been vacant?</b>	The Bursar's Office used to have a Budget Technician position which was closed for the SRP. The needs of the department have changed and we are requesting an Accounting Analyst.
<b>Job Title</b>	Accounting Analyst

### Salary Information

<b>Salary Schedule Range:</b>	121
<b>Annual Salary (Step 1) \$:</b>	83,051
<b>Step 5 \$:</b>	100,949

### Contract (check one):

- 100% FTE
- Other FTE %:
- 12 month
- 11 month
- 10 month

### Job Description Summary

- Required:** Attach a copy of the department Organizational Chart showing all positions and highlighting the position requested.



# Program Review Request- Classified

Golden West College

- Required:** Attach a copy of the CCCD Position Description, if available (obtain from Personnel Dept).
- CCCD does not have a position description as it is a new position within the district.**

### What are the essential duties this position will fulfill?

1. Participates in the budget development process for all funding sources.
2. Provides technical assistance to support research and preparation of department and program budgets.
3. Participates in preparing periodic financial reports, including variance analysis, for administrators of all funds and programs.
4. Monitors approved position controls and staffing levels. Notifies administrators of exceptions and suggests allocations that comply with stipulations of restricted funds.
5. Prepares and initiates line item transfers. Reviews expense and other requisitions for compliance with applicable standards, rules and regulations, and approved budgets, analyzing variances and resolves variances with appropriate managers. Monitors expenditures of funds carried over from prior fiscal periods.
6. Participates with input of budget data. Complies with established procedures for all funding sources. Analyzes budget reports to ensure expenditures do not exceed appropriations.
7. Interprets, administers, and complies with the policies, rules and regulations established by the Board of Trustees and the District's Fiscal Affairs department.
8. Works with departments, programs, and sites to process financial transactions with established parameters.
9. Provides technical support to departments accessing computerized accounting systems and databases that contain financial and statistical information. May assist departments in costbenefit analysis of project, program, and related proposals.
10. Interprets, administers, and complies with federal, state and local policies, rules and regulations. Prepares elements of federal, state and local financial reports relating to the assigned area of responsibility.
11. Provides assistance to other accounting staff on an as-needed basis to balance fluctuations in workflow.
12. Prepares reports of revenue and expense performance, account balances, cash balances, and other accounts that contribute to a complete description of the activity and performance of an organization unit.
13. Prepares performance reports such as estimating revenues and expenses for current and anticipated administrative commitments, computing cost-of-service by allocating labor, materials and services to accounts and comparing financial data to actual project outcomes.
14. Researches and prepares short and long range financial, fiscal, and budget forecasts for projects, programs, and operations. Integrates data from a variety of sources, both internal and external.
15. Compiles, categorizes, and organizes data to support accounting department and fiscal affairs needs.
16. Conducts studies of financial, operating, economic, and statistical data to support administrative decision-making processes. Devises methods for collecting and processing data, utilizing knowledge of available sources of data.
17. Constructs 'what if' models that simulate outcomes based on changing variables. Uses computer-aided spreadsheets, databases, and programs.
18. Develops 'pro forma' financial statements to support decisions on programs, grants, and special funds. Researches and extracts data from records of financial transactions in fund, project, or general ledger accounting systems.
19. Develops and maintains management information and control processes to assist department and program leaders understand financial position with respect to business plans, goals, and objectives.

### JUSTIFICATION

#### What is the compelling need for an immediate replacement?

The department is struggling to meet the needs of the campus. Rules, regulations and reporting for the \$106 million the Bursar's Office manages on behalf of the campus is not sustainable with the current staffing in the department. The workload and pressure the staff have been working under to meet deadline is not sustainable and will lead to staff seeking other employment opportunities or increased use of sick leave. Recruiting for the department is difficult. A comparison of the fiscal service departments for CCC and OCC revealed that the GWC Bursar's Office is funded at .78% of the campus' budget while CCC (1.2%) and OCC (1.1%) are funded at significantly higher percentages of the campus budget.

#### What are the consequences if this position is not immediately replaced?



# Program Review Request- Classified

Golden West College

The campus has experienced significant delays in processing of POs, checks, training, and reports. The external audit process has been delayed as the department struggles to meet the needs of processing everyday transactions. Transactions are missed or processed incorrectly leading to audit findings.

**If the full-time position is approved, will there be a request for funding for 160-day position during the hiring process?**

Yes

No

### Position title and Area of Specialization (if applicable)

Click or tap here to enter text.

### Needs/Priority Rubric (1-10 points)

- 1 - 4 points: Little or no contribution or impact
- 5 - 7 points: Some contribution or impact
- 8 - 10 points: Significant contribution or impact

### How does this request for a classified position meet the following criteria? (2 page max.)

Fully respond to each of the following questions. Your responses will be the basis that Planning Council and the Executive Team members will apply the criteria and rate this request.

#### #1. Program Needs (1-10 points):

Explain the conditions that are unique to the program/department which support the need for additional full-time classified staff and how this position addresses those needs. If this position is not filled, explain the consequences to the program/department that will result. Please use information from Program Review.

The Bursar's Office has oversight for over \$40 million dollars for over 70 grants and categorical programs which is up from 4 years ago to \$34 million dollars for 59 grant and categorical programs. Purchase orders, expenditure transfers, and budget transfers have all increased because of the additional funding sources. These funding sources do not have the same regulations and rules making processing transactions, verifying allowable expenses, and reporting increasingly difficult.

We need an Accounting Analyst to serve as the technical resource for these and general funds, including position control. This position is required for budget development, performing complex analytical research and reporting, monitoring revenue and expenditures, and preparation of special reports as well as the ability to analyze costs and trends, both indirect and direct, and other overhead items requiring projections.

If this position is not filled, errors occur where the grant or categorical program may have non-allowable expenses charged, delays or errors in processing budget development, audit issues and revenue sources missed.

#### #2. College-Wide Priority (1-10 points):

How does this request align and directly support the [College's Goals](#)? How does this position address stated long-term college priorities identified by College plans? (e.g. Master Plan, Instructional Plan, Student Equity Plan, Facilities Plan) *Please cite the plans and goal(s).*

The Bursar's Office supports these college goals - Enrollment, Equity & Success, Completion, Workforce Preparation, Professional Development, Facilities and Communication. This position would also support these goals by assisting divisions and departments with budget needs, budget development and position control. We support grant and categorical programs that impact student success, enrollment, and retention such as DSPS, EOPS, Student Life,



# Program Review Request- Classified

Golden West College

Counseling, VRC, Financial Aid and SEA programs. We assist these and all program at the college with reporting, budgeting assistance, budget development, allowable expenses, purchasing, training and budget projections.

### #3. Contributions to Other College Operations (20 points):

To what extent would the position requested benefit or serve other departments, programs, or plans?

This position as well as all staff in the Bursar's Office support all departments at Golden West College.

### #4. Request fills a current position that has been filled by an hourly employee for over one year because there is a demonstrated need. (10 points):

(Determined by the Executive Team)

The expertise required for this work is not able to be fulfilled by hourly staff.

#### Please provide justification why the department wants the position to be permanent.

The department is struggling to meet the needs of the campus. Rules, regulations and reporting for the \$106 million the Bursar's Office manages on behalf of the campus is not sustainable with the current staffing in the department. The workload and pressure the staff have been working under to meet deadline is not sustainable and will lead to staff seeking other employment opportunities or increased use of sick leave. Recruiting for the department is difficult. A comparison of the fiscal service departments for CCC and OCC revealed that the GWC Bursar's Office is funded at .78% of the campus' budget while CCC (1.2%) and OCC (1.1%) are funded at significantly higher percentages of the campus budget.

Submitter's Signature: *Paul Wisner*

Date: 10/6/2023

Submitter's Signature: *Paul Wisner*

Date: 11/3/2023

#### Supervisor's Review

As the supervisor of this program, I have reviewed this request.

No concerns

I have concerns

Comments: Click or tap here to enter text.

Supervisor's Signature: Click or tap here to enter text.

Date: Click or tap to enter a date.

Vice President's Signature: Click or tap here to enter text.



## Program Review Request- Classified

Golden West College

**Date:** Click or tap to enter a date.

### OFFICE USE ONLY

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**President's Recommendation:**

- Hire position
- Hire one-year temporary
- Not hiring at this time

**President's Signature:** Click or tap here to enter text.

**Date:** Click or tap to enter a date.





## Position Description

Classification: Accounting Analyst	Specification Number: 93313
Board of Trustees' approval date: 10/23/19	Salary Grade: 121

### **Summary**

Provides accurate and timely budget and financial reports that can be used for current and future financial and program decisions. Advises program administrators on budget issues. Participates in budget development processes for funding sources and/or clearing accounts.

### **Distinguishing Career Features**

The Accounting Analyst is a technical position in the accounting career path requiring in- depth knowledge of generally accepted accounting principles, budget development and financial reporting processes. The Accounting Analyst serves as a technical resource for all sources of funding to expense items including position control. Advancement to this position requires demonstration of competency in budget development, performing complex analytical research and reporting, monitoring revenue and expenditures, and preparation of special reports. Advancement to Accounting Analyst Senior is based on need and the ability to analyze costs and trends, both indirect and direct, and other overhead items and to perform special assignments requiring making projections. The Accounting Analyst Senior also may coordinate position control systems and practices.

### **Essential Duties and Responsibilities**

Specific duties may vary among department, divisions and jobs. Incumbents typically perform a substantial portion or all of the following types of duties, as assigned:

1. Participates in the budget development process for all funding sources.
2. Provides technical assistance to support research and preparation of department and program budgets.
3. Participates in preparing periodic financial reports, including variance analysis, for administrators of all funds and programs.
4. Monitors approved position controls and staffing levels. Notifies administrators of exceptions and suggests allocations that comply with stipulations of restricted funds.
5. Prepares and initiates line item transfers. Reviews expense and other requisitions for compliance with applicable standards, rules and regulations, and approved budgets, analyzing variances and resolves variances with appropriate managers. Monitors expenditures of funds carried over from prior fiscal periods.
6. Participates with input of budget data. Complies with established procedures for all funding sources. Analyzes budget reports to ensure expenditures do not exceed appropriations.

7. Interprets, administers, and complies with the policies, rules and regulations established by the Board of Trustees and the District's Fiscal Affairs department.
8. Works with departments, programs, and sites to process financial transactions with established parameters.
9. Provides technical support to departments accessing computerized accounting systems and databases that contain financial and statistical information. May assist departments in cost-benefit analysis of project, program, and related proposals.
10. Interprets, administers, and complies with federal, state and local policies, rules and regulations. Prepares elements of federal, state and local financial reports relating to the assigned area of responsibility.
11. Provides assistance to other accounting staff on an as-needed basis to balance fluctuations in workflow.
12. Prepares reports of revenue and expense performance, account balances, cash balances, and other accounts that contribute to a complete description of the activity and performance of an organization unit.
13. Prepares performance reports such as estimating revenues and expenses for current and anticipated administrative commitments, computing cost-of-service by allocating labor, materials and services to accounts and comparing financial data to actual project outcomes.
14. Prepares work-in-progress reports for projects depicting account activity, year-to-date balances and variances. Works with functional leaders to prepare narrative explanations of account activity.
15. Researches and prepares short and long range financial, fiscal, and budget forecasts for projects, programs, and operations. Integrates data from a variety of sources, both internal and external.
16. Compiles, categorizes, and organizes data to support accounting department and fiscal affairs needs.
17. Conducts studies of financial, operating, economic, and statistical data to support administrative decision-making processes. Devises methods for collecting and processing data, utilizing knowledge of available sources of data.
18. Constructs 'what if' models that simulate outcomes based on changing variables. Uses computer-aided spreadsheets, databases, and programs.
19. Develops 'pro forma' financial statements to support decisions on programs, grants, and special funds. Researches and extracts data from records of financial transactions in fund, project, or general ledger accounting systems.
20. Develops and maintains management information and control processes to assist department and program leaders understand financial position with respect to business plans, goals, and objectives.

21. Researches and resolves student account discrepancies and/or payment application errors. Researches, processes, communicates and posts student refund returns.
22. Reconciles Capital Accounts to Fixed Asset Database and Inventory.
23. Reconciles position budgets with HR Recruitments/attrition reports and maintains campus Vacancy reports.
24. May prepare accounting reports documenting adjustments to account balances, detailing the transaction trail for audit purposes.
25. May review accounting systems for controls, account classifications, and reports.
26. May review accounting items such as fixed asset balances, inventory, expenditures, cash, accounts payable and accounts receivable.
27. May direct the work of others in a lower classification.
28. Performs other related duties as assigned that support the objective of the position.
29. Required to abide by all District policies and procedures including Board Policy 3050 – Code of Professional Ethics.

## **Qualifications**

### **▪ Knowledge and Skills**

1. The position requires in-depth technical knowledge of the principles and procedures of accounting, with additional expertise in budget preparation and control.
2. Requires in-depth knowledge of generally accepted accounting principles and programs and of laws, codes, and regulations applying to assigned financial operations.
3. Requires a working knowledge of audit documentation requirements.
4. Requires working knowledge of the workings of automated accounting systems and relational databases, sufficient to train others, and to troubleshoot errors and exceptions.
5. Requires basic knowledge of position control.
6. Requires a basic knowledge of the practices and techniques in accumulating and allocating accounting information.
7. Requires working knowledge of the financial management, control, and reporting processes associated with restricted funds.
8. Requires well-developed math skills to perform complex accounting and statistical computations.
9. Requires sufficient language skills to prepare reports suitable for internal and external publications.
10. Requires well-developed human relations skills to explain detailed information to small groups and work with staff in advisory capacity.

- **Abilities**

1. Requires the ability to perform the essential responsibilities and functions of the position.
2. Requires the ability to train and provide oversight to employees performing accounting transactions.
3. Requires ability to prepare complex analyses and write reports which adequately communicate problems and solutions.
4. Requires ability to organize and prioritize work in order to meet rigid schedules and budget timelines.
5. Requires the ability to provide one-on-one and small group discussion, and otherwise work with administrative staff and peers.
6. Requires ability to initiate and conduct technical research, complete complex arithmetic, algebraic and statistical computations, solve highly technical problems associated with financial transactions.

- **Physical Abilities**

1. The general physical demands, working conditions, and essential job functions associated with this classification will be kept on file with the Office of Human Resources.
2. Essential functions will vary by position.
3. As defined by Title I of the Americans with Disabilities Act (“ADA”) and California’s Fair Employment and Housing Act (“FEHA”), the District shall engage in a timely, good faith interactive process with employees or employment applicants who are requesting or are in need of reasonable accommodations and, provide reasonable accommodations for employees or employment applicants who, because of their disability, are limited in or unable to perform one or more of the essential functions of their job in accordance with applicable state and federal law.

- **Education and Experience**

The position typically requires a Bachelor’s degree in accounting or business or equivalent plus five years of relevant and progressively responsible experience in governmental accounting and budgeting that includes monitoring of restricted funds. Or, any combination of education and experience which would provide the required equivalent qualifications for the position.

- **Licenses and Certificates**

May require a valid driver license.

- **Working Conditions**

Work is performed in an office environment with minimal exposure to health and safety considerations.

*This job specification describes the general nature of the work performed, representative duties as well as the typical qualifications needed for acceptable performance. It is not intended to be a complete list of all responsibilities, duties, work steps, and skills required of the job.*



August 2023

**Administrative Services**  
Acting Vice President (DG-14)  
*Rick Hicks*

**Business Services**  
Director (DG-10)  
*Paul Wisner*



**Business Services**  
2023 - 2024