

Academic Affairs 13 Total (13 complete)		Status	Notes	Type	Evidence	Staff Assigned	Due	Training	PG Review	Board Action
Recommendation										
Consider adjusting staffing based on the FTES.	Complete and ongoing	Spring 2020 FTES was reduced by 68 FTES. 2020-2021 Target was reduced by 115 FTES to align with declining enrollment and ensure 17.5 productivity. Ongoing, the target is set to reflect FTES.	Action	Annual FTES-FTEF Staffing	Vice Chancellor - Finance and Administration Vice Chancellor - Academic Affairs	Spring 2020	N/A	Yes	Approve	
Adopt a more realistic target for FTES based upon trend data.	Complete and ongoing	The Annual Target FTES, FTEF is now set to reflect realistic Res FTES and is set by trend data.	Action	Annual FTES-FTEF Staffing	Vice Chancellor - Finance and Administration Vice Chancellor - Academic Affairs	IP - October 2019 for 2020-21 target.	N/A	Yes	Approve	
Adopt a staffing process aligned to the FTES.	Complete and ongoing	The Annual Target FTES, FTEF is now set to reflect realistic Res FTES and is set by trend data.	Action	Annual FTES-FTEF Staffing	Vice Chancellor - Finance and Administration Vice Chancellor - Academic Affairs	Ongoing	N/A	Yes	Approve	
Validate supplemental and student success outcome metrics at the district and college level to verify all outcomes are counted correctly.	Complete	PCCD's Office of Institutional Research downloaded data from Data on demand and cross checked it with our MIS data to validate accuracy. We also met with our participatory governance committee to discuss disaggregating BOG/CA Promise and CTE, Data Integrity Project is assisting with training and validation processes.	Action	Goal from IR	Institutional Research VP of Student Services	Complete and Ongoing - State Validated	N/A	Yes	Notify	
Develop supplemental and student success projection reports to assist with goal setting, audit requirements and budget development.	Complete and ongoing	Newly developed dashboards were created for easily accessible data for all. A SCFF BI Dashboard is currently in development to transition from the use excel.	Action	Goal from IR	Institutional Research VP of Student Services	Complete	N/A	Yes	Notify	
Develop a comprehensive enrollment management team that includes members that have an understanding in outreach, scheduling strategies, and program development and improvement with the goal of increasing FTES.	Complete	Each college has developed an enrollment management team and updated enrollment management plans. The VPs and the VC of Academic Affairs meet monthly to review progress and data. CBT is supporting this growth by working with each college on scheduling this 19-20 academic year. The district wide SEM meetings occur 2-3 times per semester. College SEM meeting occur xxx. College and District updated to SEM plans occurs spring 2022.	Action	College and District SEM Plans, BCC, Laney	VP of Student Services VC - Academic Affairs College Enrollment Management Team	Complete and Ongoing	N/A	Yes	Notify	
Ensure that each financial aid offices' processes and procedures be reviewed and updated as necessary to ensure all appropriate students are part of the allocation count.	Complete. See Finance section.	Financial Aid supervisors have collaborated in developing a new Satisfactory Academic Progress, notifications to students, and procedures to disburse funds. Merritt College, for example, has been addressing recommendations to ensure that students are being provided Pell grants and other financial aid in a timely manner and reporting these funds for reconciliation.	Action	Financial Aid Reports and Audits	VP of Student Services Director of Financial Aid (Vacant) Marketing	Ongoing	Campus	No	N/A	
Understand the unduplicated student population at each college, such as full-time, part-time, special admit, etc., to assist the colleges in establishing their goals, improving student success, and increasing revenues.	Complete	IR has evaluated all data and does so annually as a part of the discussions on student success data and the validation of that data.	Review	Power BI Dashboards	Institutional Research Cabinet VP of Student Services	Complete	District	Yes	Notify	
Analyze supplemental and success metric revenues per college.	Complete	In a series of meetings, the VPIs and VPSS's assessed the supplemental and success metric revenues and set annual targets based on college activities. These are documented in the Enrollment Plans.	Review	College Multi-Year SCFF Goal Sheets-IR need to update	Institutional Research VP of Student Services	Complete and Ongoing	Campus	Yes	Notify	
Fully implement all guided pathway principles.	Complete and ongoing	Each college has fully engaged in the GP process as noted in the SOAA (Scale of Adoption Assessment) documents.	Action	College's SOAA	College Presidents VP of Student Services	Currently Up to Date and Ongoing	Campus	Yes	Notify	
Assess all course outlines of record for completion and accuracy.	Complete	Review of course outlines occurs annually with Program Review or Annual Program Updates. College Curriculum Committees support faculty in the review and update process. Currently, PCOD faculty are updating ADT degrees and developing new ADTs to maximize the SCFF.	Action	Curriculum Committee Agendas, CPD agenda, PR/APU template	VP of Student Services Curriculum Committees District Curriculum Committee	Ongoing	Campus	N/A	Notify	
Compare best practices across the district in outreach, student assistance and data entry procedures.	Complete and ongoing		Review	College Meeting Agendas, Email Communication, Website	Institutional Research College Presidents College Vice Presidents College Outreach Teams Executive Director of Public Information and Marketing	Ongoing	Campus	Yes	Notify	
Align full-time faculty with student enrollment.	Completed and ongoing	The Annual Target FTES, FTEF is now set to reflect realistic Res FTES and is set by trend data.	Action	Annual Target Excel	Vice Chancellor - Finance and Administration Vice Chancellor - Academic Affairs Chancellor	Spring 2020	N/A	Yes	Approve	

Board of Trustees
4 Total (3 Complete, 1 In-Progress)

Recommendation	Status	Notes	Type	Evidence	Staff Assigned	Due	Training	PG Review	Board Action
Terminate and restructure some of the more volatile bonds.	Complete	OPFB financial advisors will present a plan	Contract	OPFB Presentations PCCD Swap Report, 31Q First Quarter Report, Actuarial Study, Board Agendas, 311Q First Quarter Report, Actuarial Study, Total Compensation Report, OPFB Presentations, Minutes from PDC, Swap Report, OPFB Minute Strategies	Vice Chancellor - Finance and Administration Chancellor	N/A	N/A	N/A	Approve
Reconsider the current goal of fully funding the OPFB liability.	Complete	OPFB financial advisors working in collaboration with Vice Chancellor of Finance & Administration.	Review	Board agendas, OPFB Presentations, 311Q First Quarter Report, Actuarial Study, Total Compensation Report, OPFB Strategies, PCCD Swap Report, Retirement Board (REC) Minutes (available upon request)	Vice Chancellor - Finance and Administration Chancellor	Feb-2020	N/A	N/A	Approve
Consider eliminating annual general fund payments to the OPFB trust funds since they are fully funded at this time.	Complete	Requires Board Approval and Retirement Board discussion.	Review		Vice Chancellor - Finance and Administration Chancellor	Feb-2020	N/A	N/A	Approve
Consider renegotiating (i.e. ending) retiree health benefits for new employees.	Milestone Established on Track in Progress	Negotiation item: OPFB financial advisors working in collaboration with Vice Chancellor of Finance & Administration.	Review	Exploration SERP Documentation, PCCD SEU TA Review, and Spread, BOT Renegotiation of Health Benefits, Retiree Census, and Board Agendas.	Chancellor Vice Chancellor - Human Resources	Spring 2020	N/A	N/A	Approve

Fiscal Management

1 Accounts Payable

4 Total (3 Complete - 1 In-Progress)

Recommendation	Status	Notes	Type	Evidence	Staff Assigned	Due	PG Review	Board Action
Implement standardized procedures to process vendor payments in a timely manner.	Complete	Director of Purchasing Hired January 2020. Moved procurement from General Services to Finance by September 2019. Internal Auditor will review and train staff as needed.	Action	AP 6330	Purchasing Director	Jan-2020	Yes	Notify
Utilize the Peoplesoft system for approvals and verification of receipts to accommodate a timelier processing of vendor payments	Milestone Established/ Plan on track - In Progress. Will launch March 2022.	Process has been streamlined and standardized - People Soft Phase I complete. Full gap analysis performed for Phase II (Expense Module) in progress. Will launch March 2022.	Action	General Ledger Reconciliation Report	Director of Enterprise Services (Vacant) Purchasing Director	Dependent on Full Implementation	Yes	Notify
Ensure that accounts payable clearing accounts are reconciled regularly.	Complete	Senior Accountant Hired. Paid from General Fund and then reimbursed by other funds. Cash accounts are reconciled monthly.	Mgt	Reconciliation Reports	Director of Fiscal Services	Fall 2019	No	Notify
Refrain from using cash from other funds to pay invoices.	Complete		Action	Reconciliation Report	Director of Fiscal Services	Ongoing	N/A	N/A

2 Accounting

4 Total (3 Complete, 1 In-Progress)

Recommendation	Status	Notes	Type	Evidence	Staff Assigned	Due	PG Review	Board Action
Develop standardized, monthly procedures for reconciliations.	Milestone Established/ Plan on track - In Progress. Will launch Dec. 2021.	Senior Accountant Hired - Internal Auditor will review and train staff as needed. EdgeRock hired to assist in the application development for monthly close tool/template.	Action	Communication, Schedules, Related AP	Director of Fiscal Services	Jan-2020	No	Notify
Review cash management procedures across the District to ensure appropriate internal controls and oversight exist.	Milestone Established/ Plan on track - In Progress. Will launch Dec. 2021.	Monthly cash reports generated manually and provided to BOT. In progress - further assessment and refining of campus reconciliation procedures. EdgeRock hired to automate the application development for cashflow tool/template. Samples from various months provided.	Review	Board Agendas	Internal Auditor	Spring 2020	No	Approve
Verify fixed asset inventory and depreciation schedule.	Milestone Established/ Plan on track - In Progress. Will launch March 2022.	Manual depreciation schedule - HURON gap assessment performed for People Soft Phase II (Asset Management Module) in progress. Will launch March 2022.	Action	N/A	Director of Fiscal Services	Spring 2020	No	Notify
Ensure that due to and due from accounts are used for limited purposes.	Complete	All expenses paid from Gen Fund. End of month - transfer request submitted to County Office to reimburse the General Fund from other funds (e.g. bond). County Office processes transfer of funds. Samples from various months provided.	Action	Reconciliation Report	Vice Chancellor - Finance and Administration	Ongoing	N/A	N/A

3 Budget (Budget Director)

6 Total (4 Complete - 2 In-Progress)

Recommendation	Status	Notes	Type	Evidence	Staff Assigned	Due	PG Review	Board Action
Develop an internal budget calendar (for processes).	Complete	District developed an internal budget calendar for processes at the same time the Budget calendar was developed.	Action	Internal Budget Calendar	Budget Director	Nov-2019	Yes	Notify
Share the budget calendar with all departments, instead of only posting it on the website.	Complete	Budget calendar was developed in fall with the start of the budget planning cycle. Budget calendars shall be shared through additional means other than the website. The calendar is shared through the PBC, POC, and then to the Board for approval.	Action	PBM Agendas	Budget Director	Nov-2019	Yes	Notify
Consider implementing and adhering to prescribed budget timelines to support and enhance budget development.	Complete	Include in Planning and Budgeting Council (PBC) calendar and agendas.	Review	PBC Agendas	Budget Director	Jan-2020	Yes	Notify
Provide ongoing budget training for participatory governance teams, college business offices and district office staff.	Complete	Include training in Planning and Budget Council (PBC) agendas.	Training	PBC Agendas	Budget Director	Spring 2020	District	Notify

Provide training to all staff on BAM on GAAP.	Milestone Established/ Plan on track - In Progress	Annual training should be provided to stakeholders (PBW/PBC, Budget Allocation Model (BAM) handbook developed and proposed to be implemented in the budget year of 2023-24 (see BAM taskforce meeting 11/15/21). This will require fully upgraded PeopleSoft modules, in order to complete a cleanup of the position control process. Phase 2 implementation in progress. A standard operating procedure must then be established between Human Resources and Finance, to ensure data matching between both departments, and funding is allocated properly. A Teaching & Learning Center (TLC) is being established to ensure staff training and support are available.	Training	Completion of Training	Director of Fiscal Services (Vacant) Budget Director	Spring 2020	District	Yes
Provide staff development opportunities for specific functions of each job to ensure well-trained employees are managing the district's finances.	Milestone Established/ Plan on track - In Progress		Training	Position Control process is well established.	The upgrade of PeopleSoft and training on Business process will improve position control processes. Staff training will be provided based on assigned roles and requirements.	N/A	District	N/A

4 Finance (General)
6 Total (5 Complete, 1 In-Progress)

Recommendation	Status	Notes	Type	Evidence	Staff Assigned	Due	PG Review	Board Action
Develop processes and procedures to ensure that accountability measures are well communicated, and processes adhered to by all levels of staff in the organization.	Complete	Weekly executive management meetings occur to discuss accountability in all critical areas affecting district operations.	Mgt	Procedural Evaluation	Chief Presidents Vice Chancellors Vice Chancellor Chancellor	Fall 2019	Yes	Notify
Separate supervision of purchasing and accounts payable to maintain a full segregation of duties.	Complete	Purchasing and procurement returned to Vice Chancellor of Finance and Administration Spring 2019.	ReOrg	Org. Chart	Vice Chancellor of Finance and Administration Chancellor	Fall 2019	No	Notify
Consider reviewing workload distribution among the buyers and assistant buyer.	Complete	Director of Purchasing Hired January 2020.	ReOrg	N/A	Purchasing Director	Jan-2020	N/A	Notify
Schedule training to review purchasing procedures, particularly the need to submit purchase requisitions to the district office before purchases are made.	Complete	Director of Purchasing Hired January 2020.	Training	Training Documentation	Purchasing Director	Jan-2020	Yes	Notify
Prioritize the needs of the department and implement recommendations for organizational changes outlined in the internal controls section of this report to build capacity within the departments, including the following: a) fill vacant positions b) train staff for their positions c) utilize software appropriately d) insert controls within current practices	Milestone Established/ Plan on track - In Progress	Re-organization proposal pending. Key staffing has been identified to complete this function. Additionally, a program review is in progress (Jonah Nichols has been contracted to assess staffing needs and make related recommendations.). Staffing needed to FY19/20 & FY20/21 to Senior Accountants and Coordinators.	Action	Org. Chart & Program Review	Vice Chancellor - Finance and Administration Director of Fiscal Services	Jan-2020	N/A	Notify
Provide training to staff to properly complete year-end closing practices.	Complete		Training	Completion of Training		Nov-19	Yes	Notify

5 Payroll
2 Total (2 Complete)

Recommendation	Status	Notes	Type	Evidence	Staff Assigned	Due	PG Review	Board Action
Implement and reconcile payroll oversight by supervisors and management.	Complete	Payroll Director Hired January 2020. Sr. Accountant hired to reconcile payroll accounts so that checks and balances exist	Action	Development of an AP	Vice Chancellor - Finance and Administration	Spring 2020	No	Notify
Ensure the Payroll Department is physically housed and supervised in the Fiscal Services Department.	Complete	Payroll is housed in the Fiscal Service Department, for security purposes. Purchasing is a controlled area. CBT consultant working in collaboration with Vice Chancellor of Finance & Administration.	Action	Org. Chart	Vice Chancellor - Finance and Administration	N/A	Yes	N/A

6 Procurement
2 Total (2 Complete)

Recommendation	Status	Notes	Type	Evidence	Staff Assigned	Due	PG Review	Board Action
Consider reviewing a list of purchase orders and payment by vendor to avoid the practice of bid splitting.	Complete	This will be built into procedures that are developed under the realignment of purchasing into Finance and Administration.	Action	Updated Policy and Training	Vice Chancellor - Finance & Administration Director of Purchasing	60 days of New Hire	N/A	Notify
Ensure that purchasing reporting responsibilities continue to be separate from the facilities/capital projects responsibilities.	Complete	Purchasing and procurement returned to Vice Chancellor of Finance and Administration Spring 2019.	ReOrg	Org. Chart	Chancellor Vice Chancellor of Finance and Administration	Spring 2019	No	Notify

7 Financial Aid
1 Total (1 In-Progress)

Recommendation	Status	Notes	Type	Evidence	Staff Assigned	Due	Policy	Procedure
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<p>Ensure that each financial aid offices' processes and procedures be reviewed and updated as necessary to ensure all appropriate students are part of the allocation/count.</p>	<p>Milestone Established/ Plan on track - In Progress</p>	<p>Data Integrity Project launched to help financial aid staff understand and manage data components of MS and how it impacts to State SCFF allocations and student count data. Review and reconciliation benchmarks set to occur each semester to ensure that students are being captured accurately. PCDD is working with DOE to improve efficiency in capturing student data for administration, reimbursement and reconciliation of Title IV funds in a timely manner. PCDD has initiated engagement to support efficiency in financial aid operations.</p>	<p>Action</p>	<p>Financial Aid Reports and Audits</p>	<p>VP of Student Services Director of Financial Aid (Vacant) Executive Director of Public Information and Marketing</p>	<p>Ongoing</p>	<p>5130 New</p>
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General Counsel
5 Total (5 Complete)

Recommendation	Status	Notes	Type	Evidence	Staff Assigned	Due	PG Review	Board Action
Update board policy and administrative procedure to increase identified authorities to make purchases on behalf of the district.	Complete	Board Policies and Administrative Procedures to be reviewed during Fall 2019.	Board	AP 6345, BP 6100, BP 6330, BP 6340, Delegation of Authority to Chancellor	Vice Chancellor - Finance and Administration	Mar-2020	Yes	Approve
Ensure that the governing board approves the annual OPEB actuarial study.	Complete	OPEB financial advisors working in collaboration with Vice Chancellor of Finance & Administration.	Board	Actuarial Study, BOT presentation/minutes, OPEB presentation, RBC minutes	Chancellor Vice Chancellor - Finance and Administration	Jun-2020	N/A	Approve
Conduct an annual OPEB actuarial study.	Complete	OPEB financial advisors working in collaboration with Vice Chancellor of Finance & Administration.	Contract	Actuarial Study/Reports, BOT presentation/minutes	Vice Chancellor - Finance and Administration	Jun-2020	N/A	Approve
Request the actuarial to perform a separate OPEB funding valuation at the estimated rate rather than the long-term return on employee assets, so it has a more realistic liability number for the pre-2004 amount.	Complete	OPEB Financial advisors working in collaboration with Vice Chancellor of Finance & Administration.	Contract	OPEB Funding Valuation Report, Bond update, OPEB presentation, Total Compensation Report, RBC minutes	Vice Chancellor - Finance and Administration	Jun-2020	N/A	Approve
Contract for an addendum to KNN's 2011 report that would include an update of actions taken by the district to date related to its OPEB bond program since the 2011 report was published.	Complete	No longer in contract with KNN. District has a new Financial Advisor team.	Contract	BOT Agenda item for the new vendor CLA, CLA engagement letter	N/A	N/A	N/A	Approve

Human Resources 7 Total (2 Complete, 5 In-Progress)		Status	Notes	Type	Evidence	Staff Assigned	Due	Training	PG Review	Board Action
Consider reducing FTEF commensurate with the FTES at each of the colleges.	Complete	Currently reviewing enrollment reports and planning for 2020-21. * Established training plan as part of the PeopleSoft Upgrade effort * Purchase of PeopleSoft Virtual Training Subscription * Identified areas of PeopleSoft modules for training and learning * Creating training schedule to help educate employees on features and functionality of PeopleSoft.	Review	ETEF Staffing Sheet Upgrade Training Plan: PeopleSoft Training Subscription Org. Charts for HR and Finance attached.	Chancellor College Presidents	Fall 2020	N/A	Yes	Approve	
Provide ongoing staff development for position control system to Human resources, payroll, and budget staff.	Milestone Established/ Plan on track - In Progress	For Human Resources to take on and complete this task, the following is needed: a. Contract position b. Fully upgraded PeopleSoft HR Modules c. Training facilities d. Training equipment e. Funding to purchase training software.	Training	Bargaining Agreements PeopleSoft HCM Training PeopleSoft Phase 2 Assessment HR Opportunity Inventory, Phase II HCM Project	The discussions so far with HURON and the Outsource training to external Consultants who can train Managers and Employees on different modules for the different departments.	Scheduled for January - March 2022	District	N/A	Approve	
Invest in training for the PeopleSoft software.	Phase 1 Completed, Milestone established, Phase 2 is on track (In Progress)	In order for Human Resources to take on and complete this task, the following is needed: a. Fulfillme funded positions - Contract and Permanent Staff b. Fully upgraded PeopleSoft HR Modules c. Training facilities d. Training equipment e. Funding to purchase training software.	Contract	Chancellor's Update Email, PCCD Opportunity Inventory, PeopleSoft HCM Phase 2 Assessment, Phase II HCM Project	Plans are underway to create the Professional Development and Learning Center - For Professional Development	Ongoing	District	N/A	Approve	
Give employees resources to expand the use of the software.	Milestone Established/ Plan on track - In Progress	This will require fully upgraded PeopleSoft modules. In order to complete a cleanup of the position control process, Phase 2 implementation in progress. A standard cleanup of the position control process is being implemented and funding is allocated properly. A Teaching & Learning Center (TLC) is being established to ensure staff training and support are available.	Training	Announcement RE Special Assignment, PeopleSoft Phase II Board Presentation, PeopleSoft Phase II High Level Project Plan	The upgrade of PeopleSoft and training on Business process will improve position control processes. Staff training will be provided based on assigned roles and requirements.	N/A	District	N/A	Approve	
Ensure that the Purchasing and Warehouse Department reports to the Vice Chancellor - Finance and Administration.	Complete	Purchasing to report to the Vice Chancellor of Finance and Administration, (Moved to Fiscal Management to category 6 Procurement Row 47.	ReOrg	Org. chart, Director of Purchasing Job Description, Functional Map. See Chancellor's Office Row 12	Chancellor	N/A	District	N/A	Notify	
Ensure that the Fiscal Services Department reports to the Vice Chancellor - Finance and Administration (Centralized).	Milestone Established/ Plan on track - In Progress	Vice Chancellor re-organization proposal pending. VC reorg happened 2 years ago, when VC Brown took on Student Success as well as Academic Affairs	ReOrg	EdgeRock Memo, Consultant Recommendations, Approval Request for Huron Consulting Svcs, PCCD Opportunity Inventory, VC Academic Affairs Job Description	Chancellor	N/A	N/A	N/A	Notify	

Information Technology \$ Total (1 Complete, 4 In-Progress)		Status	Notes	Type	Evidence	Staff Assigned	Due	Training	PG Review	Board Action
Recommendation	Utilize and/or provide a more integrated payroll system.	Milestone Established/ Plan on track - In Progress	1. Established integration between PeopleSoft Payroll and Finance (Financial accounting information related to employee pay data) = Phase I completed; Phase II* - on-going 2. Request and approval workflows outlined = Completed August 2019 3. Automation of time accounting lead to Payroll systems Phase I completed; Phase II on-going** 4. Provide ongoing training as requested = To be completed in Phase II** 5. Working on Phase II of Time and Labor Implementation (Self-Service Time Repetition) = To be completed in Phase II**	Action	Functional Workgroup Meeting Action Plan	CTO Payroll Manager Director of Human Resources Benefits Manager	IIP	District	No	Notify
	Implement the automated position control module in PeopleSoft that will drive the budget for staffing costs.	Milestone Established/ Plan on track - In Progress	1. Implementation timeline develop for PeopleSoft HR system to allow for full implementation to Position Management = To be completed in Phase I** 2. Outline of Position Management deployment strategy (i.e. Departmental Rollout) = To be completed in Phase II**	Action	Functional and Technical Specifications Document (Enhance Integration); PeopleSoft Upgrade Timeline	CTO Payroll Manager Director of Human Resources Budget Director	Jun-2020	District	No	Notify
	Develop procedures for adding and/or removing access rights to software and the financial system.	Milestone Established/ Plan on track - In Progress	1. Operational procedure and protocols have been implemented = Completed in Phase I* 2. Request and approval workflows outlined = Completed in Phase I* 3. PeopleSoft security access request (PeopleSoft Security Request Form) and approval framework active = To be completed in Phase II**	Action	District IT Operating Standard Procedure (Access Management)	CTO	Complete	District	N/A	N/A
	Research the access rights of all district office and off-site staff having access to the financial system.	Milestone Established/ Plan on track - In Progress	1. Reviewed access rights of all financial users within PeopleSoft FS = Completed in Phase I* 2. Request and approval workflows outlined = Completed in Phase I* 3. Created security audit report to Fiscal Auditors for Reqs, PQs, and GL = Manual Process; Automation in Phase III*** 4. Created implementation plan for align access level based on job functions and duties = Manual Process; Automation in Phase III***	Review	Security Access Audit Report	CTO Director of Fiscal Services	IIP, October 2019 for 2020-21 target.	Dept.	N/A	N/A
	Assign view-only rights in place of full access to individuals who should not be able to change payroll, human resources, or benefits information of employees.	Complete	1. Performed initial application security audit for all payroll, human resources, or benefits information = Completed in Phase I* 2. Reviewing security audit report to align user access rights = Completed in Phase I* 3. Re-establishing security framework for easy provisioning of security access = Completed in Phase I*	Action	Security Access Audit Report	CTO Payroll Manager Director of Human Resources Benefits Manager	IIP, October 2019 for 2020-21 target.	District	N/A	N/A

Marketing & Communications 3 Total (2 Completed, 1 In-Progress)		Marketing & Communications 3 Total (2 Completed, 1 In-Progress)									
Recommendation		Status	Notes	Type	Evidence	Staff Assigned	Due	Training	P-G Review	Board Action	
Develop a communication plan, (marketing, district messaging, and website)	Completed	New Executive Director is in the process of developing a district marketing communication plan.	Action	Marketing Director's 90-Day Plan	Executive Director of Marketing	Dec-2019	District	Yes	Notify		
Create and follow a plan to proportionately reduce expenses as it relates to FTES production.	Completed	CBT consultant working in collaboration with Vice Chancellor of Finance & Administration Services. Addressed in May 25 Ratification of Hires ppt to the Board.	Action	Email Communication	Vice Chancellor - Finance and Administration	Mar-2020	Depl.	Yes	Approve		
Evaluate outreach efforts by the financial aid offices at each colleges.	Milestone Established/ Plan on track - In Progress	FA offices have been involved in community outreach at high schools, community events, and in Express Enrollment events on campuses. Mark Johnson to follow-up with the college VPSSs to confirm the status of what has been done as it relates to FA outreach.	Review	Marketing Director's 90-Day Plan	VP of Student Services Executive of Marketing Director of Financial Aid (Vacant)	Sep-2019	District	N/A	Notify		

OPEB 3 Total (2 Complete, 1 In-Progress) Recommendation		Status	Notes	Type	Evidence	Staff Assigned	Due	FCMAT Control	PG Review	Board Action
Audit annual enrollment eligibility in the OPEB program.	Milestone Established/ Plan on track - In Progress	OPEB financial advisors working in collaboration with Vice Chancellor of Finance & Administration.	Action	AP 6400, BP 6400, OPEB Strategic Presentation, Total Compensation Report.						
Conduct an annual actuarial study.	Complete	Total Compensation	Action	Actuarial Study, Bond update, OPEB Presentation, RBC Minutes, Total Minibus Compensation Report, AP 6400, BP 6400						
Terminate and restructure some of the more volatile bonds	Complete - Ongoing	OPEB financial advisors and Chancellor Providing Options for Consideration.	Action	Swap Report & OPEB Straglies						