



Financial Knowledge and Empowerment for ALL

Team: FF Enterprise

Cohort 8

2018

Introductions

Monica Satterwhite, Department of Administrative Services

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Problem Statement and Background

- Lack of fiscal operational knowledge leads to communication breakdown between fiscal and non-fiscal staff.



COMPLIANCE
RULES
GUIDELINES
REGULATIONS
LAWS

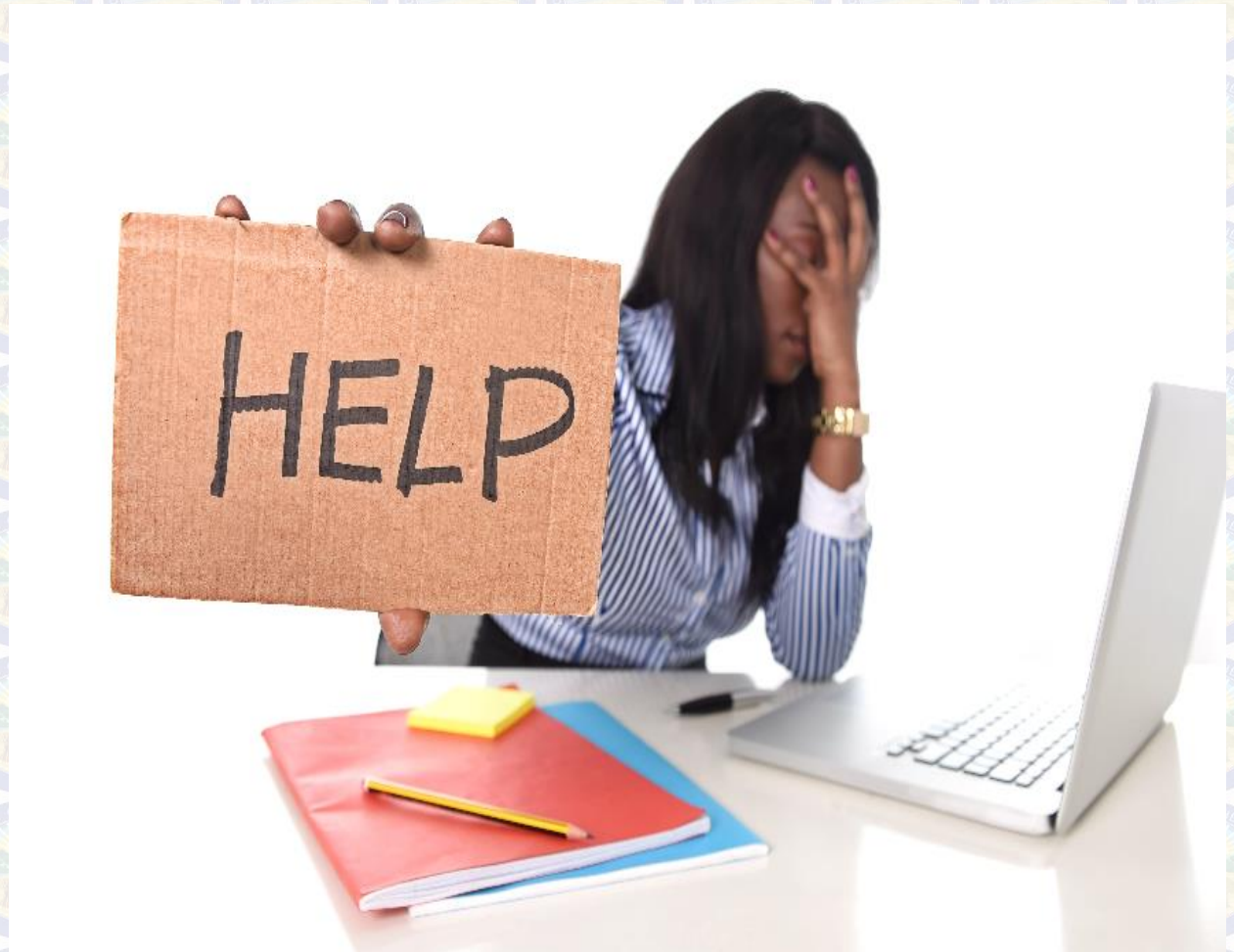


- Causes frustration between fiscal and non-fiscal
- Leads to processing delays
- Corrections
- Audit risks



Impacts

- Unbudgeted purchases made without approvals
- Revenues improperly recorded
- Denied requests due to lack of supporting documents
- Late travel reimbursements
- Improper use of State resources
- Staff burnout/ strained relationships





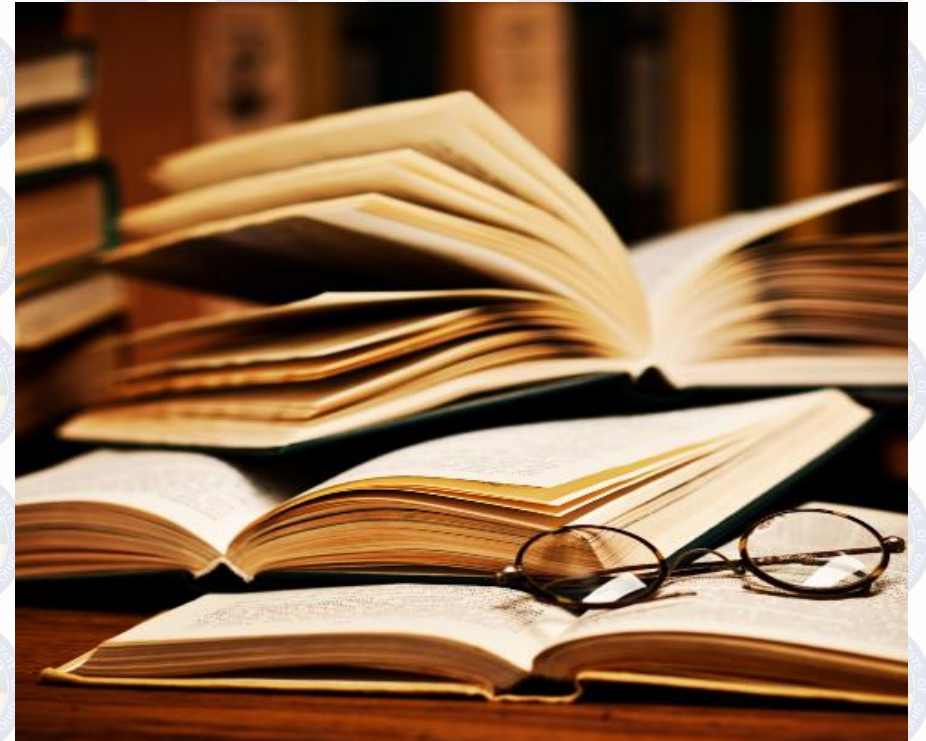
NEEDS

**BRIDGE
THE
GAP**

RESOURCES

Current Resources

- OAKS ELM Courses
 - OAKS FIN Billing and Accounts Receivables Overview
 - Statewide Fiscal Orientation
- DAS Procurement Websites
- FIN Source
 - SAFE Manual
 - OAKS FIN Process Manual
- Fiscal Knowledge Exchange
- Enhanced myohio.gov



Current Resources (continued)

- Terminology
- Details
- Scopes
- Numerous



RESEARCH

FACTS

BUSINESS

EXPLORE

PRODUCT

MARKET

SYSTEMATIC

METHODS

EXAMINE

KNOWLEDGE

DIRECTION

RESULTS

PLAN

SUBJECT

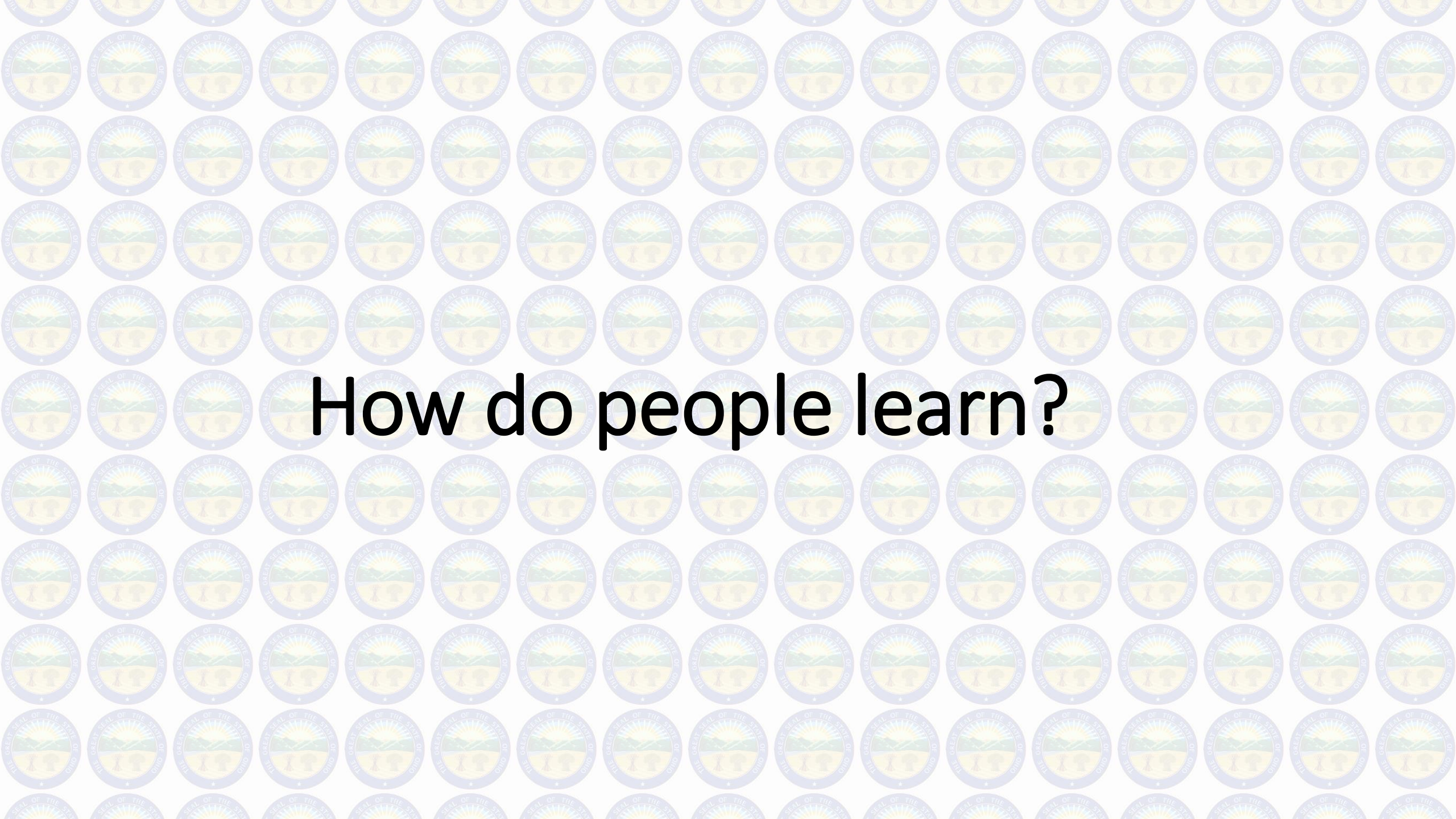
MARKETING

ANALYZE

DEVELOPMENT

SAMPLE

FACTORS



How do people learn?

VARK Model

Visual

Aural

Read/Write

Kinesthetic

VARK Model

Visual

Aural

Read/Write

AS

Kinesthetic

BB

SG

VARK Model

Visual

MS

BC

Aural

MS

Read/Write

MS

Kinesthetic

BC

VARK Model

Visual

MS

BC

Aural

MS

Read/Write

AS

MS

Kinesthetic

BB

SG

BC

Let's Ask The People!!

Would Training Help you??

- Be more comfortable in reaching out to the other division
- Resolve more of your own issues
- Understand State fiscal processes better
- Would it save you time
- Lastly; do you want it?



Fiscal & Their Customer Service

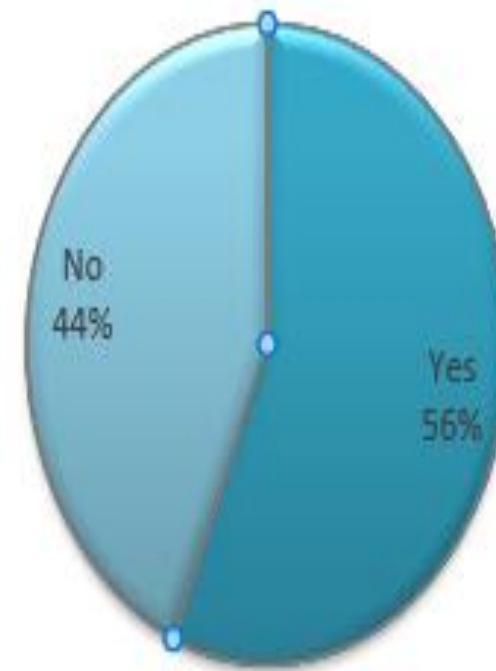
- Over 92% of Non-Fiscal employees surveyed feel very comfortable asking for Fiscal help.
- That rating is great from a customer service standpoint!!!
- But are they too comfortable???



Empowering Yourself

- 56% of Non-Fiscal
- Employees feel that
- it would help
- Time saving for all

Would Fiscal training help you throughout the day?

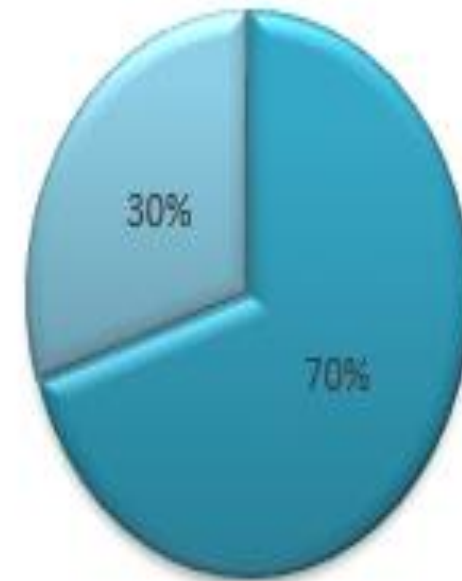


■ Yes ■ No

Understanding Fiscal Rules & Your Role

- 70% of Non-Fiscal employees will understand more about their role
- The more you know, the smoother it goes!!!

Would knowing the overall process help you understand the importance of your role?

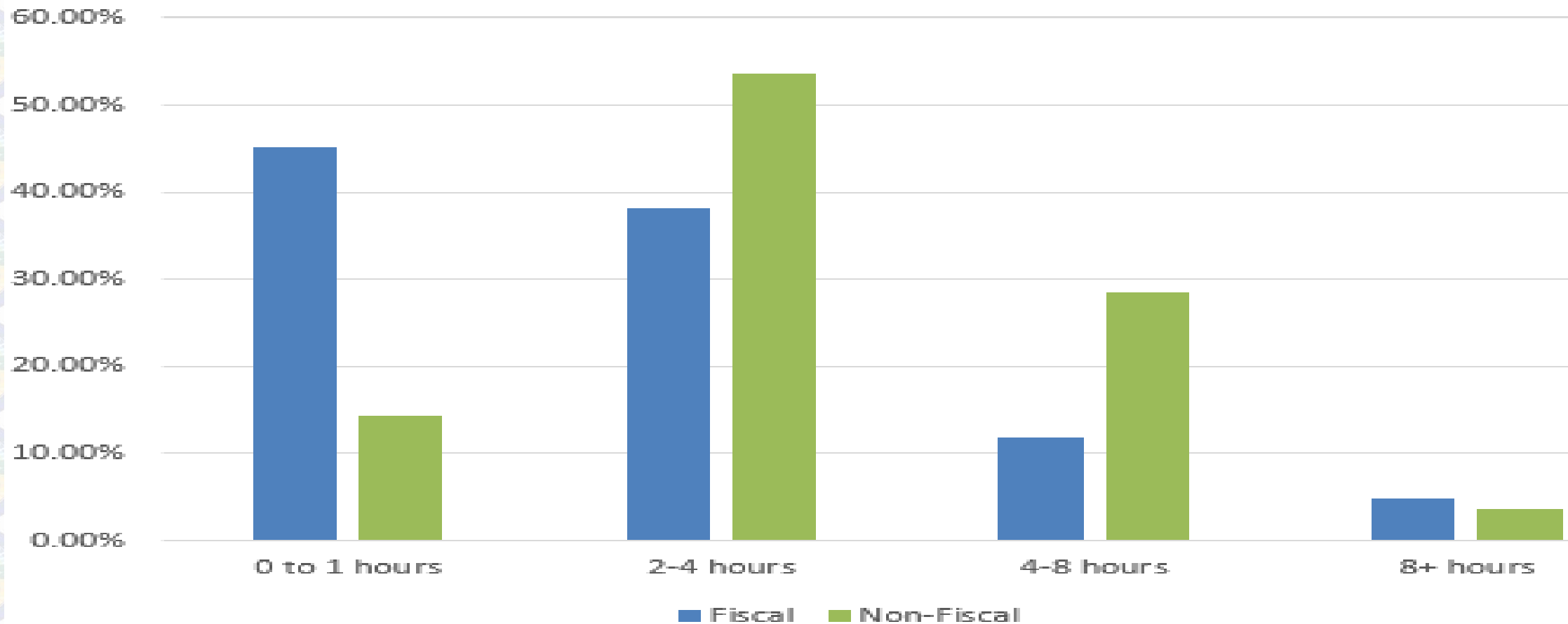


■ Yes ■ No

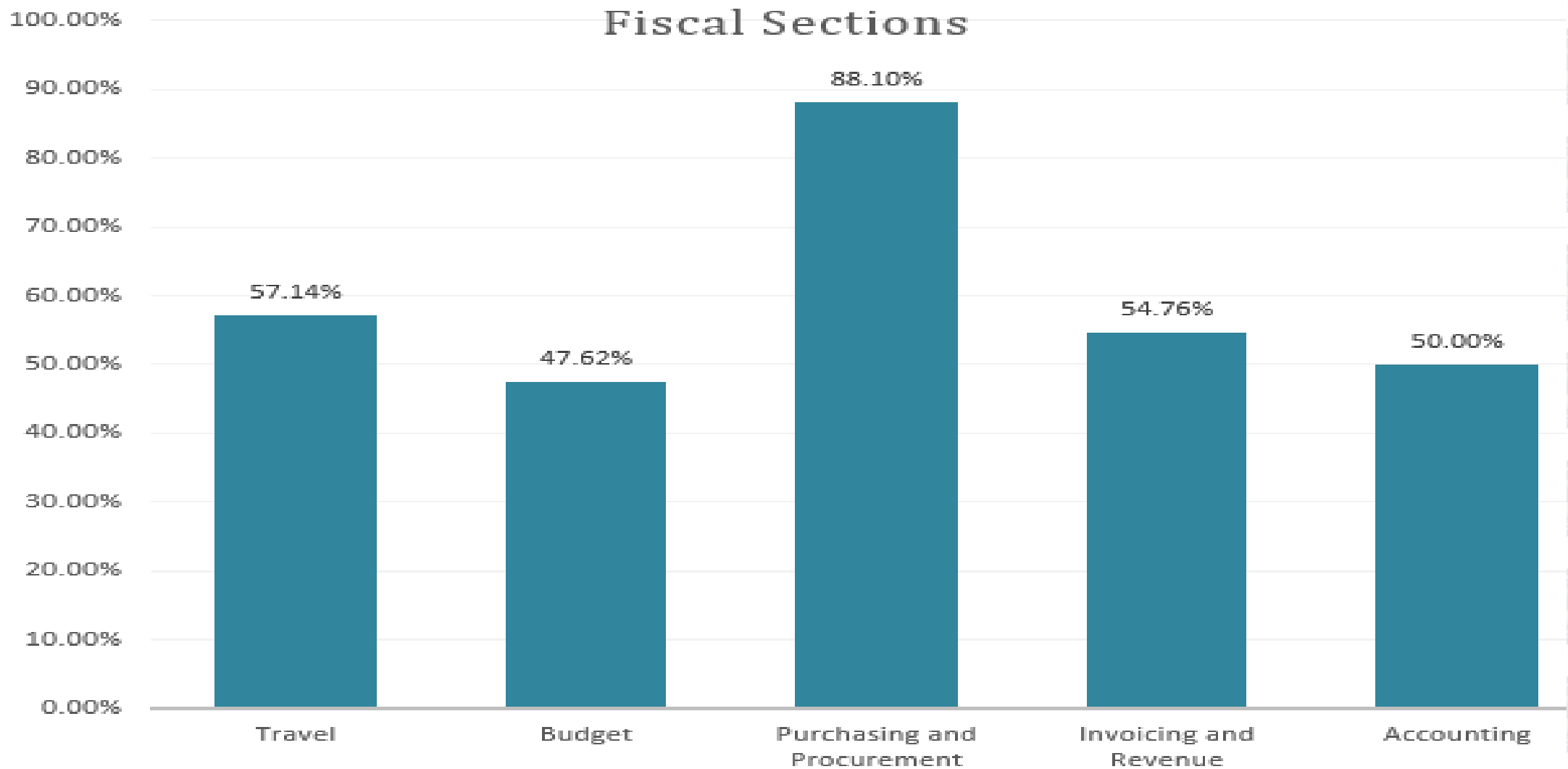
Saving Time = Productivity

Fiscal vs. Non-Fiscal

Potential Time Saved Weekly

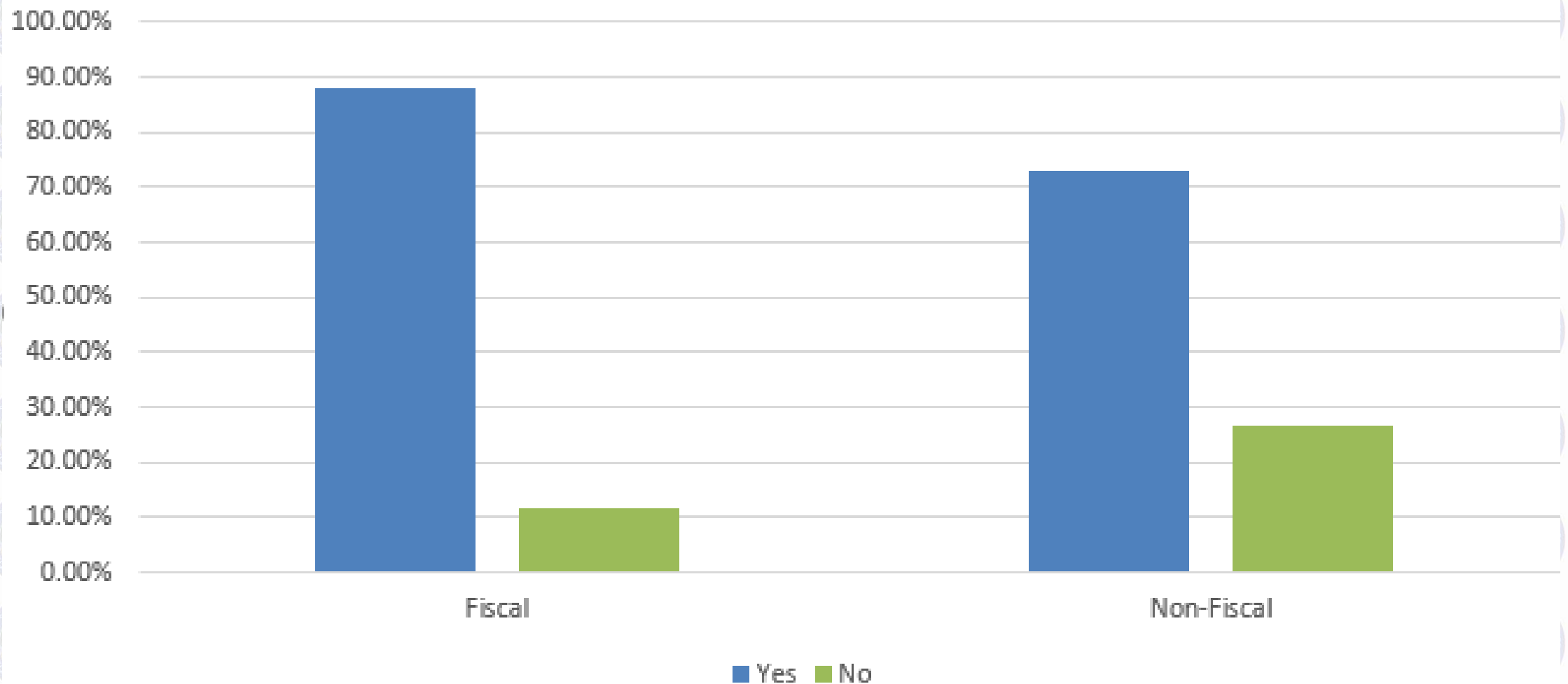


What to Focus On?



Will Employees Buy In?

Would training be beneficial?



SME Interviews



- Nikki Williams – OBM
- Dawnielle Pierce – JFS
- Billie Corson – OHFA

Current Situation

- Inconsistency of Agency Practices
- Fiscal Terminology
- Information Retention



Web-Based Training

<u>Pros</u>	<u>Cons</u>
Mass distribution	No face to face interaction
Distribute Information Quickly	Easily distracted
Reduced Cost of Printing Materials	Information Not Passed Along
	Fast Pace

In-Person Training

<u>Pros</u>	<u>Cons</u>
Personal Interaction with instructor	Lack of desire to travel
Visual Demonstrations	Time Away From Work Locations
Network with Colleagues	Scheduling Conflicts

Recommendations

- Propose Solutions That Address The Issues Identified
- Focus on Career Development NOT Day-to-Day Issues
- Complete Training Needs Analysis





**OHIO HOUSING
FINANCE AGENCY**

Travel Expense Report (TER) Issues



**OHIO HOUSING
FINANCE AGENCY**

Travel Expense Report (TER) Issues

- **Many travelers**



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**OHIO HOUSING
FINANCE AGENCY**

Travel Expense Report (TER) Issues

- **Many travelers**
- **Lots of errors and corrections**
- **Frustrations between departments**

Solutions

- Training session
- Mandatory for travelers
- In person





- Fewer errors
- Time Savings
- Better interdepartmental relationships



Conclusions

- What problems are you experiencing that needs to be addressed?

TRAINING NEEDS ANALYSIS



- What problems are you experiencing that needs to be addressed?

- What are the symptoms that made you believe a problem existed?



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- Explain the audience in terms of age, tenure, education, etc.

- How flexible are you with the structure, approach, and creativity?



- What does success look like? What behavior changes are required to know the training is successful?



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- What training already exists and is there a way it can be leveraged?
- What are the audience's attitudes towards the training?





“Tell me and I forget, teach me and I may
remember, involve me and I learn.”
Benjamin Franklin



Questions

References

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- Orthman, Norasmah, and Amiruddin, Mohd Hasril. "Different Perspectives of Learning Styles from VARK Model." *Procedia - Social and Behavioral Sciences*, vol. 7, 2010, pp. 652-660, doi:10.1016/j.sbspro.2010.10.088.
- Paradis, Paul. "13 Questions to Ask When Scoping a Learning Engagement." Five Keys to an Effective Training Needs Assessment, 15 May 2014, <https://www.dashe.com/blog/training-development/questions-learning-development-engagement/>