

Jonathon
Williams

Talking Points
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My father, now retired, worked many years in a leadership role for the city of Tacoma. Growing up, he would share stories about his job. One time, in a large meeting, one of the executives had an outburst. In front of everyone in the room, this individual motioned towards my father and yelled out: "I MAY NOT LIKE HIM, BUT HE'S FAIR!"

Back then, I couldn't understand why my dad kept experiencing opposition and workplace enemies... all he was doing was following the guidelines and holding others accountable. How could that ever lead to tension and friction on the job? Now that I'm much older, I understand more clearly now than I could back then.

My name is Jonathon Williams, and I recently received my 5-year pin last September on Opening Day. I currently serve as the Assistant Director of Financial Aid Compliance, and I'm here today to stand in the gap for our students. Budget discrepancies have been ignored, minimized, and in some cases never acknowledged on any professional level. It pains me to say this, but I have to since no one else will, the Board of Trustees have received a narrative that has been both inconsistent and inaccurate when compared against properly vetted financial data. Although this is an uncomfortable subject, we must address budget discrepancies. It was mentioned earlier, but it's worth repeating. Looking at the 2022-2023 Financial Statement Audit Report, here was the conclusion: "Clover Park Technical College lacked adequate internal controls... the process management used was not effectively designed to detect or correct errors."

Before disagreeing with the findings from the audit report, ask yourself this question: "Would you knowingly eat at a restaurant that lacks adequate internal controls?"

Here's the context to the content:

During part of the 22-23 aid year, I previously served as the Student Aid & Scholarships loan specialist. On 2/14/2023, our annual loan allocation was reduced to \$0 as an employee from another department withdrew our entire loan allocation, all at once, 1.95 mil was instantly overdrawn. We received several notices from the Dept of Ed these written warnings are known as letters of unsubstantiated cash balance.

Excess Cash Requirements

The U.S. Department of Education (the Department) considers excess cash to be any amount of Title IV funds that a school does not disburse to students or parents by the end of the third business day after the date the school (1) received the funds from the Department ... In limited circumstances, cash may be held for up to seven calendar days. A school must meet the excess cash tolerance and must be able to disburse the aid to students within the 7-day period. In no circumstance should cash balances remain beyond the seven days. [FSA handbook]

1.2 mil of the original 1.95 mil was eventually returned over a month later on 3/31/2023. That's over a month of an interest free 2-million-dollar loan. Why am I calling it an interest free loan? The audit report states that these funds were not properly allocated and calls out that a portion of the loan funds were categorized as Unrestricted Cash.

Although, I was readily available to provide assistance, no one from the other department ever reached out to me about the excess cash violation. From then, even now to this present day, no one reached out to discuss what happened nor have I ever received an email or any acknowledgment from the other department that an error ever took place. This is firsthand context of what the audit report was eventually able to uncover: the

auditors were able to account for the 750k student loans funds that mysteriously reappeared as unrestricted revenue during 2023 operating year.

Neglect is harm; therefore, neglecting to create adequate internal controls harms our students. Off the record, we should *hypothetically* be more concerned with the *allegedly* hidden issues that were **not** uncovered in the Financial Statement Audit Report. Issuing duplicate checks to students and then attempting to label it as student fraud (when the student goes to deposit the check) when it's in fact institutional error: harms our students. Attempting to cover up a double payment by trying to quietly delete the disbursement record from the system: harms our students. Mailing checks to students who specifically requested not to receive it by mail, then requiring them to sign a lost check affidavit when the check never arrives: harms our students.

[...] the intention isn't to point fingers, nor demean the work that others are doing but to point attention towards just how heightened the issues are because they have been minimized, underreported, and at times even intentionally concealed. It's ongoing for several years now with no accountable plan of action. I wouldn't be here in front of you today, if I saw signs of positive movement. During the 24-25 aid year, 1.3 million loan funds were overdrawn and held, the same mistake repeated. Since we've been witnessing severe mistakes being repeated, we must conclude that there is an established pattern of errors—which then means that it is likely due to improper procedures and/or lack of proper training. We know this to be true as the audit confirmed our experiences: "the process management used was not effectively designed to detect or correct errors." But, the auditors and certain dignitaries on campus didn't have additional context that illustrates just how large these errors have been and the impact it's had on our staff and students. [...]

During the shared governance training session from Monday, we were all told to be critical on the policies but soften for the people. We're here today due to the lack of written business procedures and when we attempted to call out the lack of written procedures from a place of well intentions, it did not land softly on those whom we personally respect and appreciate. And with no buffer in place, no structural documents of written procedures to provide protection, it's understandable for the individuals doing the work to feel a measure of inward defensiveness. But we've seen the results, we've experienced firsthand the severity of the issues: millions of dollars misallocated. So, now we're backed into a corner because we desperately need someone who is willing to implement a plan of action and enforce the tracking of training efforts. Why? The audit recommended that those responsible for preparing financial information need to have adequate training to present accurate financial statements that are in compliance with generally accepted accounting principles (GAAP standards). [The auditor's very first recommendation, bulleted point number one near the bottom of page 5 of the report].

Here on campus, there are at least two deficits. There's a relationship deficit and a budget deficit. According to Dr. John Gottman's research for The Gottman Institute, there is a 5:1 relationship interaction ratio. His research found that, "Happy couples have at least five positive interactions for every one negative interaction." Now I'm not entirely sure if this also applies to work relationships, but there are several departments that are still recovering from hurt and past betrayals, and there hasn't been enough positive interactions to provide balance. Unfortunately, we must acknowledge that there is no magic ratio of interactions to fix the mismanagement of funds. We owe it to our students to have proper business procedures in place that reflect careful attention to their needs and financial well-being. Amid state budget deficits, we owe it to ourselves to have an accurate portrayal of the financial health of our institution.

Hello Board of Trustees,

My name is Danny Lee and I am the Assistant Director of Student Life and I have been at CPTC for a little over 4 years.

We are all here today because we truly care about the students at CPTC and truly enjoy working with our students. However, as you heard my colleagues there are things that we as an institution can do to better everyone's experience.

What we are asking from the board of trustees and the executive team is accountability, transparency, and to show care:

Accountability:

We ask the Board of Trustees to hold the executive board team accountable to create formal written policies and procedures, bringing in all of the subject matter experts and stakeholders when working on all projects relates to CPTC. We ask that the board of trustees could make sure that these are happening by checking in with e-team and also the subject matter experts who are working on the projects. We ask the e-team to follow up with us directly. We really do want to work with you all directly, please do not hear as if we are upset, but that we are trying to move forward.

Transparency/Communication:

Again, it would be helpful to have formal documents, policies, and procedures. We also ask that people can communicate in a timely manner instead of neglecting/ignoring, and simply not responding to people who have questions and concerns. We are all busy and I get that, but it would be nice to even have a courtesy email or message saying that one received a message. It's not just staff to staff communication, but even to our students. I hear so many times that they get sent to voicemail and people never follow up with a phone call or email. That is disheartening to hear when our job is to support our students.

Care:

~~One way to show care is to provide a safe space for our students. I want to re-emphasize one of Brandon's ask and it is to provide safety to our students at East Side Campus. Not just East Side, but all of our campuses including South Hill Campus.~~

We ~~also~~ would like communication. Being neglected or ignored does not feel good and definitely does not show care. At times, I question whether we are truly centering students' needs, or whether we are prioritizing what leadership believes serves students—often based on trends or individual priorities—without fully understanding what our student population actually needs to succeed. When leaders focus on differing ideas of what is important, it can limit our ability to work cohesively toward a shared goal. In my view, that shared goal should be improving the CPTC student experience through collaboration and collective effort.

~~Write Down~~ ~~July 10~~

We have met with Joyce, E-team, and other leaders on campus and so far we have not found complete resolution of the concerns that we have. The concerns that we have are serious and impacts everyone at our college, including the most important, our students. I do want to acknowledge that there have been minor changes and improvements, such as Shared Governance. The school has revamped the Shared Governance Model and the committees started and are at hard work, but we should know that Shared Governance is not a catch all tool to resolve all the outstanding issues and concerns.

We ask to honor the vulnerability of all of us sitting here in front of you today. We are trusting that this is a brave space, a space where change and care can happen. Please see this as a risk, for some of us who are not represented by a union and risking our positions because of the things we shared today. Again, the things we shared are important and we believe that we can make positive change if we work together by being transparent, holding one another accountable, and actually caring about each other.

We have been told to use our "agency" so we are trying to do that by asking all of our leadership, including you all, the board of trustees to see our concern and work with us.

Good evening, trustees my name is Celva Boon and I am the Director of Student Aid and Scholarships department. I love my work and care deeply for the students I am blessed to serve at CPTC. I want to state for the record that those of us here tonight are raising our concerns to your level as we have already brought it up to E team and to Dr. Loveday but have seen minimal improvement and we are seeking further accountability, As my work is highly driven by federal or state guidelines and compliance, I am specifically concerned about the absence of formal written policies and procedures in many areas of the college that has led to confusion, frustration, wasted time and compliance risks for staff, faculty and students.

For example, Myself and Dr. Loveday have to sign statements with the Department of Education that attests to the fact that the college Has written procedures and policies outlining the responsibilities of the various offices with respect to the approval, disbursement, and delivery of Title IV, Higher Education Act program assistance and that the college Administers such programs with adequate checks and balances in its system of internal controls. Providing false or misleading statements can result in a fine of \$58,328 or imprisonment of not more than 5 years.

Recently the Office of the Washington State Auditor provided the college with a report to provide information on the College's financial activities and condition. In that report they stated,

The College lacked adequate internal controls to ensure its financial statements and related schedules were accurately prepared and reviewed. The process management used was not effectively designed to detect or correct errors before the audit, and did not ensure the College's statements and required footnote disclosures were accurate, complete and presented in accordance with GAAP. Specifically, the College did not:

- Perform monthly reconciliations between the general ledger and bank statements promptly
- Perform year-end adjusting journal entries promptly
- Ensure the financial statements and related schedules submitted for audit were final and agreed to underlying accounting records

- Effectively review appropriations and net position balances to ensure they properly classified. We consider these internal control weaknesses to be a significant deficiency.

The college's response was "We concur". We also do have some outstanding areas of non-compliance from our 2024 OCR report and basic consumer disclosures which could be addressed by someone or a team sitting down writing out the appropriate policies and procedures. We cannot continue to function in this manner as we may find ourselves in a situation where we are subject to both federal and state adverse action.

While I acknowledge that shared governance can be one tool to address this issue, it cannot be the only tool by which we address the lack of written policies and procedures. CPTC must prioritize this work in order to reduce the gaps in adherence to regulations. Hard cross departmental conversations need to take place ASAP and the decisions made need to be documented. Staff, faculty and students should be able to easily gain access to policy and procedure documents. I reviewed the Intranet and while there are many places for policies/procedure documents to be housed very few are actually posted. If the college needs to purchase a system or hire someone to assist in creating written policies and procedures, the resources for that should be allocated immediately. Trustee's, We claim that we want to be nimble and responsive to the workforce and our community but without written policies and procedures we cannot do that. Please use the agency granted to you all by the Governor to help us All be accountable and to ensure the college is operating in the most efficient and complaint manner possible.

Good evening Esteemed Members of our Board of Trustees,

My name is Lisa Fortson, I am the Associate Director of our Student Aid & Scholarships office also known as the Financial aid office. I have been here at the college since 2011 and in higher ed for the last 26 years. I write to bring forward concerns regarding the sustainability and capacity of the Student Success (SS) division in light of recent enrollment growth and expanding institutional initiatives. These concerns relate directly to the Board's oversight responsibilities for institutional effectiveness, equitable resource allocation, and student outcomes.

Institutional Impact and Capacity Concerns

Over the past several quarters, Student Success has experienced a substantial and sustained increase in workload driven by enrollment growth, expanded access initiatives, and increased student need. These demands have not been matched with proportional increases in staffing or operational resources. As a result, Student Success teams are operating beyond sustainable capacity, creating risk to service quality, employee retention, and student outcomes.

Student Success functions—including welcome entry, advising, enrollment, retention, financial aid, and wraparound support services—are foundational to enrollment stability and persistence. While enrollment gains are often highlighted institutionally, the essential infrastructure required to recruit, enroll, and retain students relies heavily on these services. Continued under-resourcing places the institution at risk of diminishing returns on enrollment growth and undermines long-term student success goals.

Operational Alignment and Decision-Making

Several institution-wide initiatives have expanded the scope, hours, and geographic reach of Student Success services without corresponding resource investments. Although data has been collected and shared to assess the effectiveness of these initiatives, there is limited clarity regarding how this information informs continuation, modification, or discontinuation decisions. This raises concerns about operational alignment, transparency, and effective use of institutional resources.

Collaboration, Shared Governance, and Accountability

Student Success staff frequently carry a disproportionate share of responsibility for student-facing events, outreach, and cross-campus coordination. Limited participation from other instructional or programmatic stakeholders has resulted in uneven workloads and reduced institutional effectiveness. Additionally, institutional messaging that attributes success to individual divisions rather than shared effort risks reinforcing silos and weakening collaborative governance structures.

Requests for Board-Level Consideration

ONE WORD: ACCOUNTABILITY!!!

In support of institutional sustainability and student outcomes, we respectfully request the Board's consideration of the following:

1. Evaluation of staffing and resource allocation for Student Success to ensure alignment with enrollment growth and institutional priorities.
2. ~~Support for operational flexibility, including alternative scheduling structures, to maintain service quality and employee well-being.~~
3. Reinforcement of transparent, inclusive shared governance practices that ensure Student Success participation in initiatives impacting its operations (decisions that are made outside of the shared governance current model).
4. Clear institutional expectations for cross-divisional collaboration, participation, and accountability.
5. Oversight of evidence-based, data-informed decision-making processes and communication.

6. Promotion of institutional messaging that reflects shared responsibility for enrollment, retention, and student success outcomes and accountability.

Conclusion

Student Success remains deeply committed to the institution's mission and to supporting students in achieving their educational goals. However, without strategic alignment, adequate resourcing, and shared accountability, current conditions are not sustainable.

What we say is as important as what you hear. We sincerely hope that you are hearing us today and will consider these concerns through the lens of long-term institutional health, equity, and student success.

We respectfully seek the Board's leadership in ensuring that institutional structures, resources, and practices align with stated priorities for student success, equity, and long-term stability.

We ask that you honor the vulnerability of everyone before you today. We are trusting you and truly hoping for meaningful change. For some sharing today, this involves real risk, especially those who are not represented by a union. They are placing their positions at risk by speaking honestly.

What we have shared matters. We believe that positive change is possible if we work together with transparency, hold one another accountable, and genuinely care for one another.

Thank you for your attention to this matter and for your continued stewardship of the institution.

Respectfully,