

# Financial Administrator Development Program

## Wrap Up

*June 2, 2017*

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*Vice President for Finance and Treasurer*



# Agenda

1. Review what we have done
2. Your feedback stats on the sessions
3. Evaluate what we did /share ideas for future classes
4. Identify issues for this group to discuss in future meetings

# Review Where We Started

Sharing New Knowledge and New Reports Help Us Make Better Decisions

- This class is the fifth class since the pilot program
- You were chosen to participate and represent important units from across campus
- You each brought a variety of knowledge, experience, and skills
- You were expected to teach and mentor each other (and us), as well as learn
- Question is: Did we succeed together?



# Changing World => Changing Roles

## Goals of the Financial Administrator Development Program

- T-shaped individuals
- Broader perspective of how actions affect university
- Better understanding of financial situation (unit and university)
- Deeper knowledge of cost structures
- Clearer view of impact current processes have on the overall university's effectiveness and cost
- Increased use of financial information to make better informed management decisions

# Changing University Requires Changing Culture

## World-Class Research University Needs World-Class Support Units

- Higher expectations and accountability
- More effective service delivery
- More cost-efficient operations
- Metric driven management decisions
- Self supporting financially
- Continuous drive to get better
- Encouraging collaboration
- Looking at the impact on the institution rather than the unit
- Willingness to take calculated risks for bigger rewards



# Financial Administrator Development Program

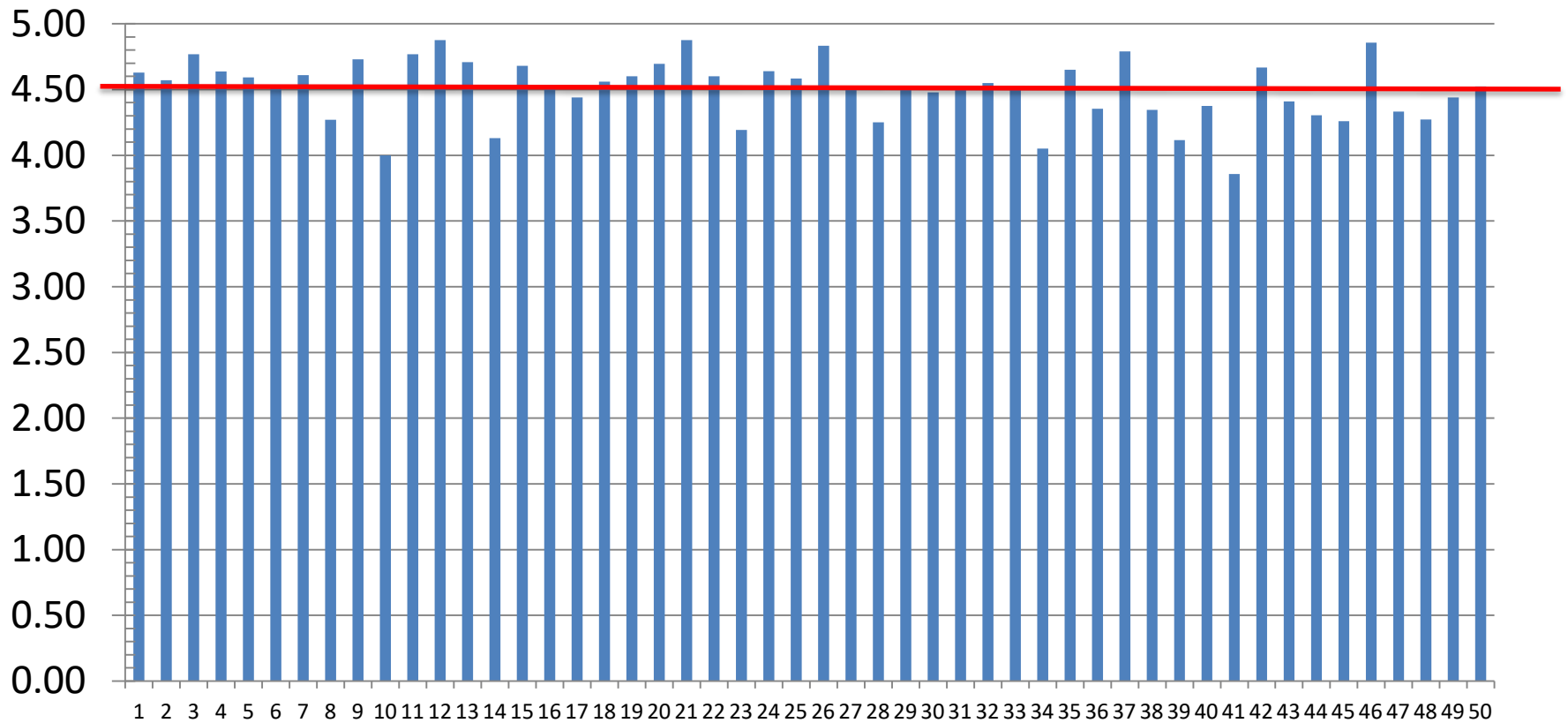
## Another Step to Keeping MSU World-Class

Oct 2016	Nov 2016	Jan 2017	Feb 2017	April 2017	May 2017	June 2017
<ul style="list-style-type: none"> <li>• <b>Session 1</b></li> <li>• Welcome / University Strategic Planning</li> <li>• Success Strategies / Myers Briggs</li> <li>• Internal Controls and Ethics</li> <li>• Undergraduate Education and Studies</li> <li>• Financial Statements and External Audits</li> <li>• Audits</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Session 2</b></li> <li>• Communicating Institutional information</li> <li>• Treasury, Financial Mgt and Investments</li> <li>• Financial and Tax Policies / Processes</li> <li>• FOIA</li> <li>• IT Services</li> <li>• MSU Financial Data Analysis</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Session 3</b></li> <li>• Registrar's Office</li> <li>• Student Financial Services</li> <li>• Financial Aid</li> <li>• Records Mgt</li> <li>• Travel</li> <li>• Procurement Goods and Services</li> <li>• Student Affairs and Services</li> <li>• Legal Issues and Risk Assessment</li> <li>• Risk Mgt and Ins.</li> <li>• Admissions</li> <li>• Budget Administration</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Session 4</b></li> <li>• Finding Funding, Budget Prep, Proposal</li> <li>• Award Process</li> <li>• Post Award Contract and Grant Admin</li> <li>• Facilities and Admin. Costs</li> <li>• Clinical Research</li> <li>• Financial Data Analysis cont'd</li> <li>• KC Update</li> <li>• Athletics</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Session 5</b></li> <li>• Research Outcomes</li> <li>• Data Services</li> <li>• Advancing a Culture of High Performance</li> <li>• Governmental Affairs</li> <li>• State Government Relations</li> <li>• University Advancement</li> <li>• Working with Gift Funds</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Session 6</b></li> <li>• Total Compensation and Wellness</li> <li>• Talent Management</li> <li>• Employee Relations</li> <li>• Payroll Policies</li> <li>• Benefits and Benefit Cost Rate</li> <li>• Accounting Orgs, Charts of Accounts, &amp; Workflow</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Session 7</b></li> <li>• Facilities Planning and Space Management</li> <li>• Secchia Center</li> <li>• MSU Construction</li> <li>• Know Your Niche</li> </ul>



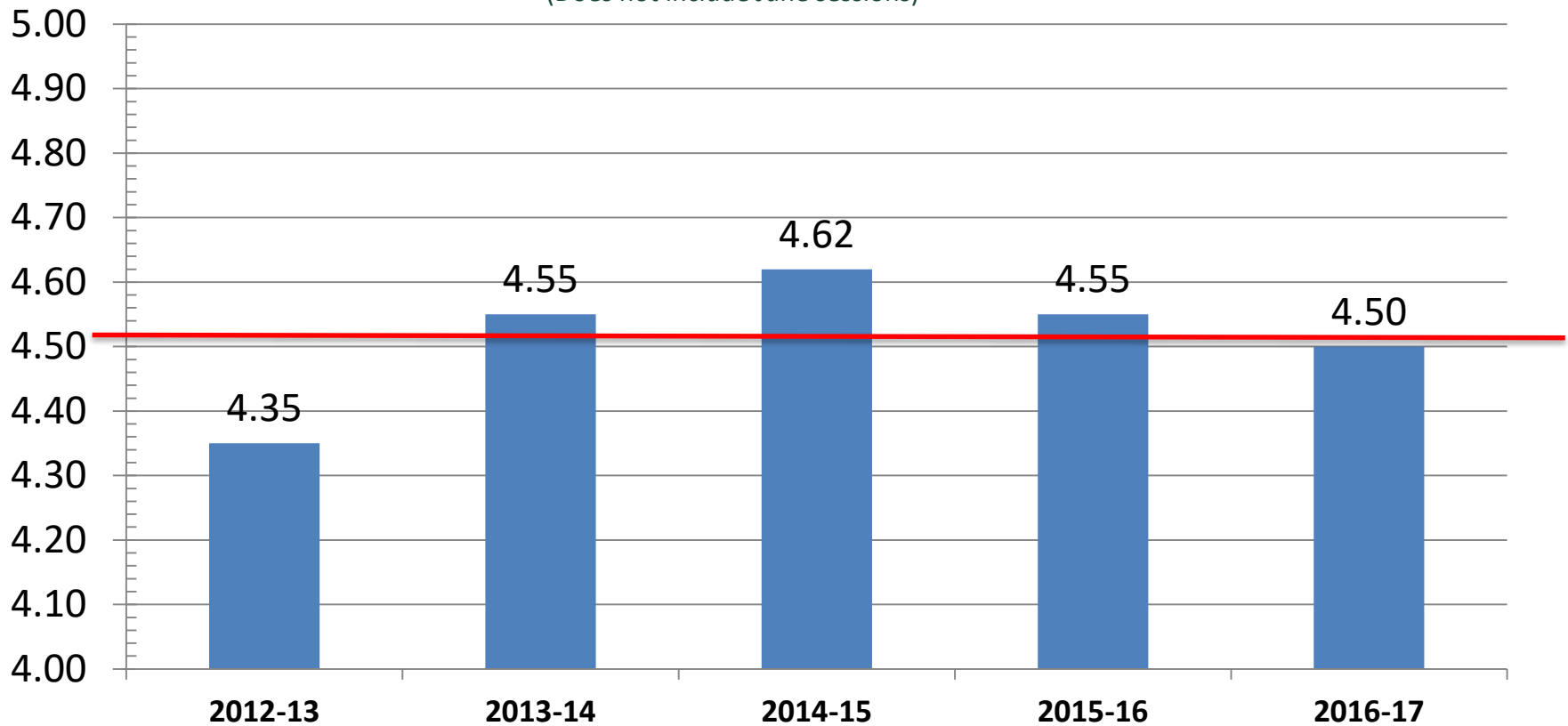
# Expectations Met: 4.50 Avg

(Does not include June sessions)



# Over Last Five Years Expectations Met: 4.51 Avg

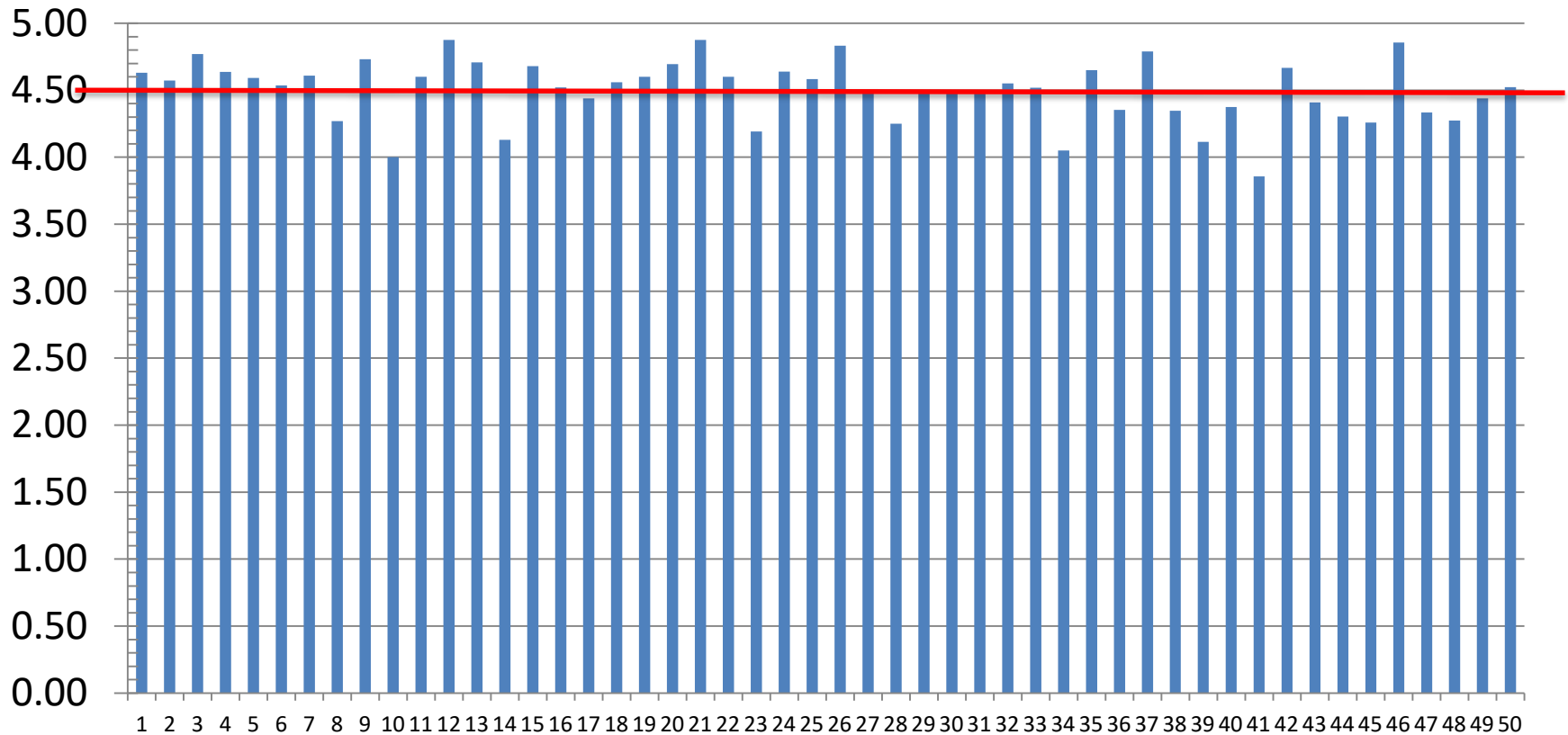
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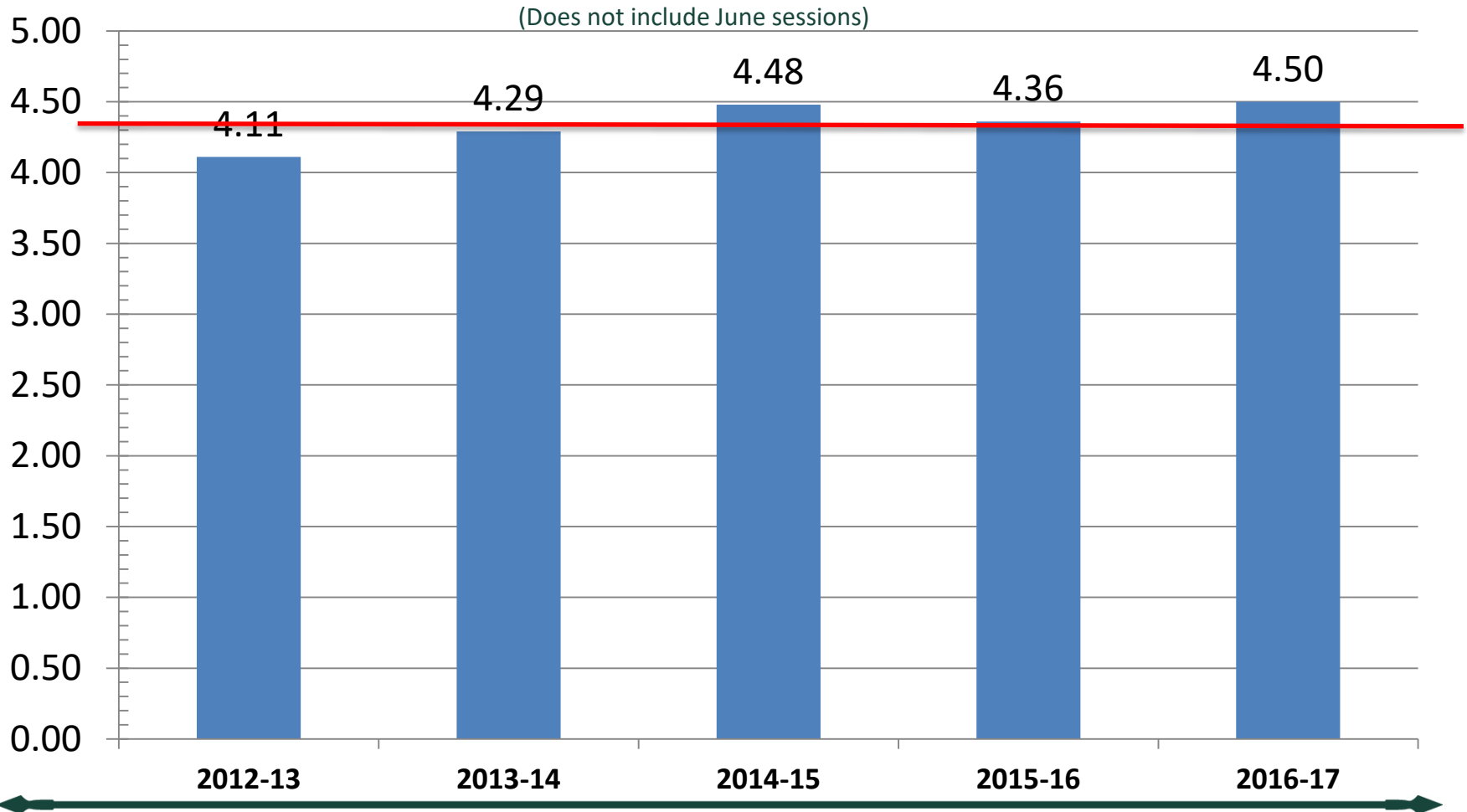


# Felt Actively Engaged: 4.50 Avg

(Does not include June sessions)



# Over Last Five Years Felt Actively Engaged: 4.35 Avg



# Discuss the Next Program Class

- Who should participate in the next class (list)
  - a. Units
  - b. Individuals
- How should agenda or presentations change?
  - a. Take a moment to complete program evaluation
  - b. Discussion

# Future Alumni Meetings

Are there other issues you want to cover?



# Thank you for your participation!

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