

IOWA STATE UNIVERSITY™

Professional and Scientific Council

General Council Meeting

October 6, 2022, 2:10 p.m.

Room 3560, Memorial Union

Councilors: Please make sure you have signed in at the registration table and have your name placard

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Professional and Scientific Council

- **Call to Order & Seating of Substitutes (Patrick Wall)**
- **Establish Quorum (Lynne Campbell)**
- **Approval of the Agenda**
- **Approval of the Minutes**

September 1, 2022, General Council Meeting Minutes

Administrative Reports

- **Heather Paris – Interim Senior Vice President for Operations & Finance**
- **Rachael Gross – Operations Manager for Finance Service Delivery**



Training and Development: Introduction to Financial Leadership

Agenda



Provide concept background



Share mission/vision



Discuss key participants



Discuss the proposed project plan



Review tentative dates and set future meeting schedule



Background

- Clear need has been communicated to provide training for financial leadership roles across campus.
- Financial leaders new to the University have limited training and “word of mouth” guidance or desk manuals (department developed).
- Requested by senior leadership to develop training materials for those roles, preferably in digital format.
- General concept was introduced in FLAG leadership meeting in August.
 - Requested recommendations from the FLAG leadership team for those who could assist in the project.
- Met with change management to develop a project plan and methodology to get the project off the ground.

Vision

- **Objective:** To provide an introductory training course on financial business processes and tools, interdepartmental collaboration, and essential information needed to work in a financial leadership position at Iowa State University.
- **Mission:** Enhance financial staff knowledge and skills with high-quality and accessible training. The training aims to inform and educate financial leaders on institutional financial strategy, policy and procedures, common financial transactions, and other financial-related topics.



Audience & Tentative Timeline

- **Audience:**
 - Cost Center Managers (CCM)
 - Business Unit Managers (BUM)
 - Business Unit Financial Analysts (BUFA)
 - Financial Administrative Support Specialists (CCFA or similar)
- **Timeline:** Training will be delivered via Workday Learning. The goal is to have this 3-part training developed and available for staff by July 1, 2023.

Key Participants

Payroll and Tax
(Angela Elthon)

Divisional Business
Administration
(Kayt Conrad)

Finance Service
Delivery
(Rachael Gross &
Stephanie Schoeller)

Treasurers
(Brad Dye)

Accounts Receivable
(Tammy Hansen &
Kylie Lara)

Procurement
(Cory Harms &
Tera Lawson)

Institutional Financial
Strategy
(Brad Steward)

Controller's Office
(Joe Golwitzer)

Recommendations?

Format

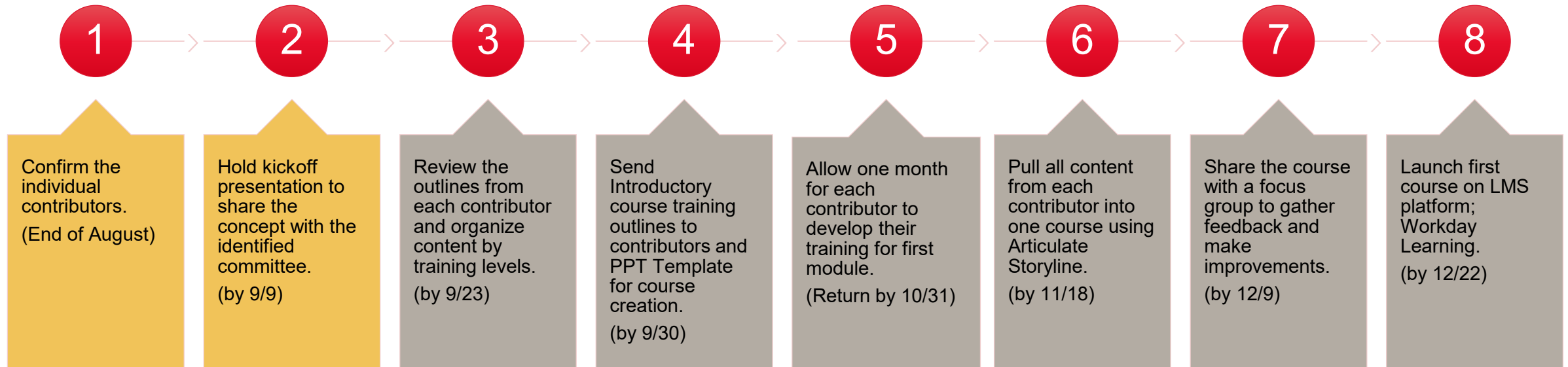
To make training more manageable (for both the trainer and the trainee), we propose creating developmental training levels

Introductory – Intended to provide details on introductory topics such as Foundation Data Model, organizational structure, budget structures, sponsored programs, allowability and appropriateness, and intro to basic workday transactions.

Intermediate – Provides higher level training on reporting, appropriately moving spending authority/balances, petty cash, payroll accounting, expense reimbursement, and other challenging transactions.

Advanced – Provides complex training on audit reporting, internal billing (FFS), receivables, tuition, retro payroll, COI, and non-conventional payments.

Phase I: Introductory Training



Phase II & III

- Phase II in the Spring (Intermediate Module)
- Phase III in the Summer (Advanced Module)

Campus Engagement

WorkCyte

Modernizing Iowa State Systems

*What current finance role do you hold in Workday?

- ☐ Cost Center Manager (CCM)
- ☐ Business Unit Manager (BUM)
- ☐ Cost Center Financial Analyst (CCFA)
- ☐ Other: Not listed

*How long have you been in your current position?

- ☐ One year or less
- ☐ 1 to 5 years
- ☐ 5 to 10 years
- ☐ 10 or more years



To gather additional topics, knowledge gaps, and training opportunities, we will be administering a survey and survey link to Cost Center Managers and Business Unit Managers

This is an opportunity to hear from you and your team on what topics will be beneficial to incorporate into the training.

Following the completion of the draft module, we will use Articulate Review 360 to gather additional feedback and make necessary changes before publishing

Conclusion

Any questions?

Next steps

- Please participate in the survey to provide additional topics we can incorporate in training.

Professional and Scientific Council Executive Committee Reports

- **President – Jamie Sass**
- **Secretary/Treasurer – Lynne Campbell**
- **Vice President for Equity and Inclusion – Marlene Jacks**
- **Vice President for University Community Relations – Sarah Larkin**
- **Vice President for University Planning and Budget – Matthew Femrite**

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ISU WORKLIFE Newsletter

- Flu Vaccine Clinic – Open through October 14 at State Gym. Monday-Friday from 9 AM – 4 PM
- CyDay Friday Walk – Friday, October 7 at 12 PM, starting in front of Beardshear Hall. Great way to connect!
- Contact worklife@iastate.edu with questions

The SHOP Food Pantry

- Increasing hunger awareness and food security
- Run by volunteers and food is obtained through donations
- Located at 1306 Beyer Hall
- <https://www.stuorg.iastate.edu/shop-foodpantry-2011>

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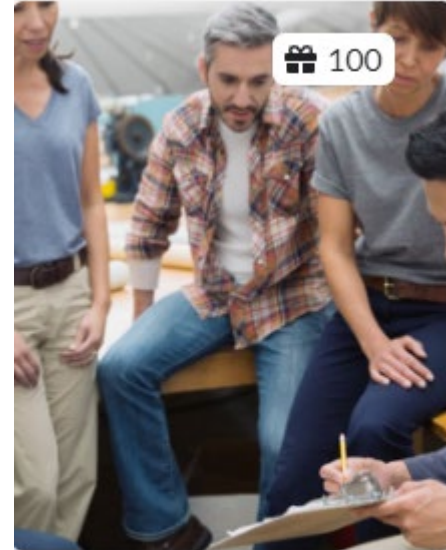
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—ADVENTURE²—

Featured Activity



LinkedIn Learning Path



Work on Professional
Development Together

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Report of the Vice President for University Planning and Budget

Professional and Scientific Council Committee Reports

- **Awards – Susy Ankerstjerne**
- **Communications – Deanna Sargent**
- **Compensation and Benefits – Erin Gibson**
- **Peer Advocacy – Jacob Larsen**
- **Policies and Procedures – Paul Easker**
- **Professional Development – Jennifer Schroeder**
- **Representation – Jason Follett**



Cultivate 2023

Professional Development Conference

Presented by the Professional & Scientific Council

February 22, 2023

Request for Proposals is now open!

- Submissions are being accepted from September 1 through November 4
- All submissions will be reviewed by the conference subcommittee
- Speakers will be notified by November 18



Looking for proposals to match four tracks:

Human Interactions

networking, communication, conflict resolution, diversity and inclusion, etc.

Leadership

leading from different levels, working with people and groups, etc.

Health and Wellness

stress management, financial planning, personal health and safety, mental health, etc.

Professional Resources

technical tips and tricks, tools, project management, benefits, etc.

Unfinished Business and General Orders

- **None**

New Business

- **Work Session on FY23 Strategic Initiatives – Developing Measurable Outcomes**

Work Session: Measuring Strategic Initiatives

Goals: Developing strategies and/or plans that will identify WHAT is being accomplished in accordance with our strategic initiatives and HOW we can measure success and share information with constituents

Instructions

- Find your committees
- In your committees...
 - Review our strategic initiatives
 - What is a “wish list” of accomplishments for your committee in relation to the strategic initiatives?
 - What part does YOUR committee play in moving the needle?
 - What are action items? What form do they take...motions, conversations, research?
 - What do you need to do these things? Resources, buy-in, information?
 - Who are your potential collaborators? Other committees? Exec? Our shared governance partners? Other campus collaborations?
- How can you demonstrate what is being accomplished?
 - Can we quantify any of the potential action items? How? How to distribute and share?
 - Can we qualitatively share progress on our potential action items? How? How to distribute and share?
- How are we actively seeking constituent feedback as we consider all of the above?

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Open Discussion for the Betterment of Council

Announcements

- **Announcements from Councilors**
- **Seminar Series Event: Effective Professional Reference & Nomination Writing, October 11th, 2 PM, Webex (Jamie Sass, Director of the Ivy Writing & Speaking Center)**
- **Executive Committee Meeting
October 20, 2022, 10AM-Noon, Location: TBA**
- **General Council Meeting
November 3, 2:10 PM ,The Great Hall, Memorial Union**

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Adjournment