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CU I&E Submission: Financial Onboarding & Training [1]

Team Information

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Who

Leila McCamey - Associate Director; Project Owner
Carol Shannon-CCO Training and Development Specialist
Sharon DeCarlo - Performance and Quality Manager
Nadiya Vovk - Grants Senior Systems Manager
Jackie Infantolino - Communication Specialist

What

Develop standardized onboarding and training courses to build skills and knowledge base for faculty, staff, and executive-level employees that will allow each to understand and execute their fiscal responsibilities in a manner that protects the university from financial, audit, and reputational risk. Courses will include basic training for new employees and advanced training to enhance skills as employees grow. Our plan is to launch training through several venues. For example: Skillsoft courses, monthly knowledge sessions, webinars, and short educational videos. Throughout the process, we will engage central and campus stakeholders for input and subject matter expertise. Using Agile-Scrum frameworks, we have created an inventory of financial training, identified gaps, prioritized which courses to bring to market, and developed a standardized method to create and launch new courses.

Why

- A well-trained work force reduces financial, audit, and reputational risk to the university. Mandatory courses allow for more consistent knowledge across the campus, which increases confidence in the accuracy of our financial statements.
- Employee retention may be increased by providing access to courses that increase skills and prepare staff for promotional opportunities within the university system. This also translates to less time and money spent training new employees.
- Efficiency should increase because fewer mistakes need correction. Also more time becomes available for financial statement review, forecasting, or other higher-function tasks

When

Embraced an Agile-Scrum framework for managing work starting September 2020. We were mentored by Agile coach Kyle Kirves a Certified Scrum Master from OIT who took our team through the process. The Scrum framework is a process for managing work in alignment with agile principles.

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Links
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