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CU I&E Submission: Fiscal Onboarding for Project Staff [1]

Category

Finance & Accounting
Training/Education

Submitted By

Sarah Horwitz, sarah.horwitz@cuanschutz.edu [2], Research Services Manager (Grant Lifecycle Manager), Centers for American Indian and Alaska Native Health

Project Team

Sarah Horwitz, sarah.horwitz@cuanschutz.edu [2], Research Services Manager (Grant Lifecycle Manager), Centers for American Indian and Alaska Native Health
Erin Poole, erin.poole@cuanschutz.edu [3], Assistant Director, Budget & Fiscal Planning

Project Description

We created a 2 part training to onboard new staff members to the administrative aspects of their job. It is an onboarding that is meant to be done 2 months into the job. Each time we onboard someone, we do the same first session that introduces our staff, project roles, and policies. The second session contains many different procedures that the staff may partake in. This session is tailored based on the trainee's role. After the training, the trainee can watch the training on our YouTube channel, review the slides, and click through the resources that are shared. The purpose of this training is for new staff members to gain a surface level understanding of different procedures and know where to go to find the answer.

Project Efficiency

This helps increase efficiency for both the administrative team and the project team. It cuts down on mistakes and questions towards to administrative team on how to complete admin tasks. It cuts down on time spent by the project team on administrative work. This, in turn, helps us all do our jobs better and increases efficiency towards the work of the project. It also takes some burden off of the PIs, who already have a lot to juggle.

Project Inspiration

When I started the job I learned that many people who had been in their jobs for years did not

have a basic understanding of fiscal practices, or even what the admin team does, mostly because they had not been taught. They were often penalized for making mistakes, but did not have the foundational knowledge to help cut down on mistakes. I wanted to find a way to give project teams the tools to make the administrative work seem less daunting and to bridge the relational divide between the admin team and the project staff.

What Makes You Happiest about this Project?

I enjoy spending time with new staff members and learning about their roles. I also like the cross-trust that this training has built. It allows them to know that we are here to support them and allows me to know a bit more about their projects and their needs.

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