

TRANSFORMING TOGETHER

Creating a Culture of Investing in Our People

Emily Moran and Rachel Victoria

University of Florida - Finance & Accounting

Today's Agenda

Where We
Started

Engage with
the Mission

Living Our
Core Values

Building
Community

Enabling
Growth

Celebrating
Success





BACKGROUND

About the University of Florida



WSJ #1 Public University

- More than **60,000 students** and about **30,000 employees**
- Main campus in **Gainesville, FL** with locations in all 67 Florida counties
- **Flagship university** for the State of Florida
- One of only 17 universities in the country to have the distinction of **land, sea and space grant status**



Go Gators!

New & Notable

Only US University

With 6 health-sciences colleges on a single campus



AI Initiative

Partnership in 2020 to create the nation's most powerful university-owned supercomputer

\$1 Billion

In research expenditures during 2022



Empowering UF

Administrative Systems Modernization and Workday implementation

About the CFO Division

Office of the SVP and Chief Financial Officer

Finance & Accounting

Controller's Office & Center for Excellence
Cost Analysis & Construction Accounting
Research Participant Payments
Asset Management/UF Surplus
Banking & Merchant Services
Bursar
Disbursements/Travel
General Accounting & Financial Reporting
Auxiliary/Fee-for-Service Accounting
Payroll & Tax Services

Treasurer

Budget

Procurement

Procurement
PCard
Shared Services

About Finance & Accounting

- **Core support for a variety of critical functions for the University of Florida**, including payroll, accounts payable, travel, student payments, general accounting, and more
- Many functions **interact more with other core offices or campus departments** than with other Finance & Accounting departments



150

Employees

Including full-time, part-time, temporary and student workers

- Division **consists of employees serving a variety of roles** - picking up surplus equipment, entering journals, answering questions for students/parents, etc.
- **Located in 4 different buildings** that are not adjacent - one is offsite main campus



**WHERE WE
STARTED**

UF | Finance & Accounting
UNIVERSITY *of* FLORIDA

Mission: We strive to exceed expectations








UF Finance & Accounting
UNIVERSITY of FLORIDA

Maintaining and supporting
the University's fiscal responsibilities
through accurate accounting and
financial compliance.

WWW.FA.UFL.EDU



UF Finance & Accounting
UNIVERSITY of FLORIDA

-  **RIGHT RESULTS, RIGHT WAY**
-  **POWERED BY PROFESSIONALISM**
-  **CULTURE OF LEARNING**
-  **GO THE EXTRA MILE**
-  **CHALLENGE THE STATUS QUO**

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TO BE THE MOST

KNOWLEDGEABLE AND TRANSFORMATIVE

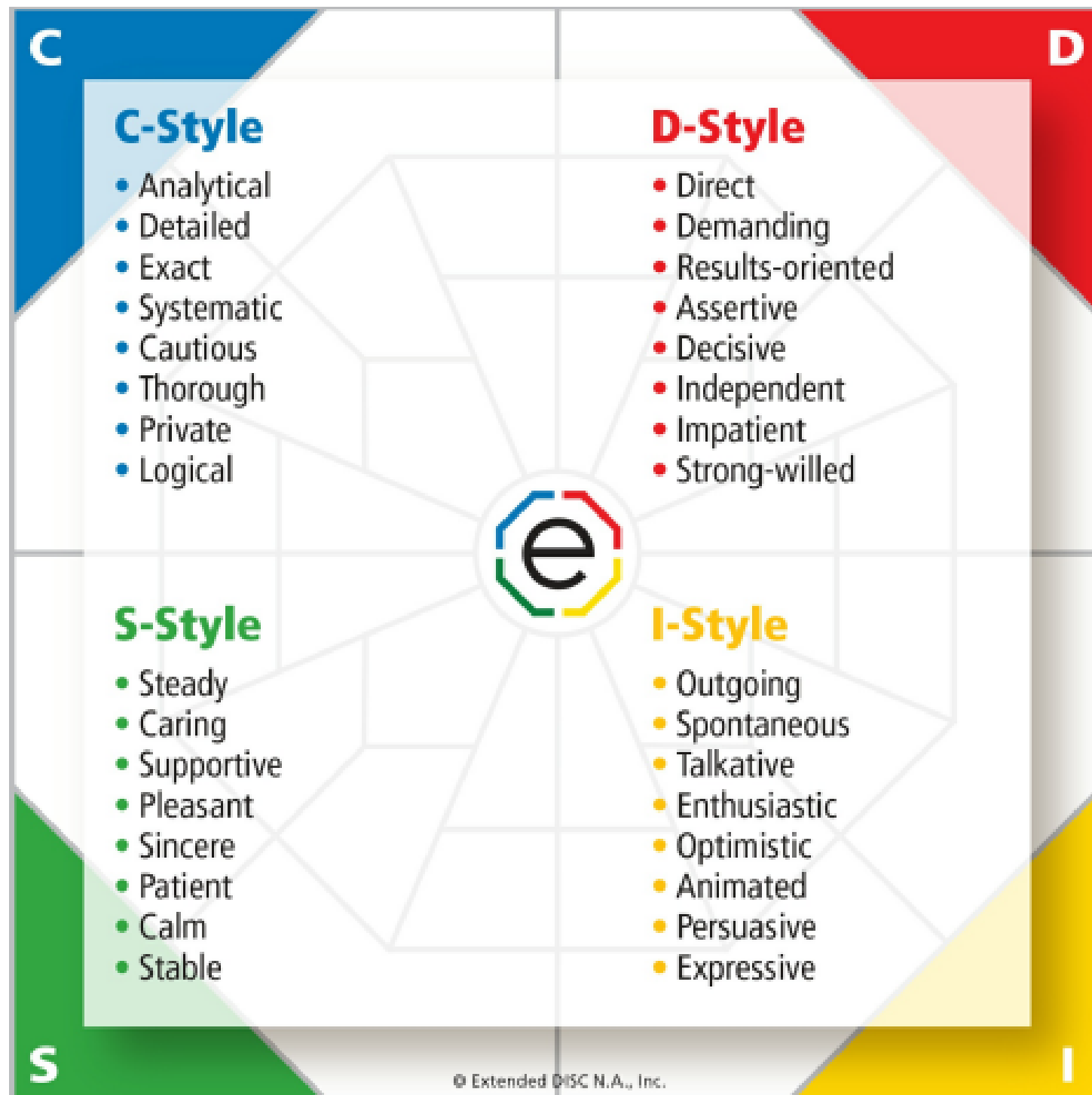
FINANCE & ACCOUNTING DIVISION IN THE NATION.

Understanding Ourselves & Each Other



- **Partnered with HR Organizational Development**
- Held two retreats for each department:
 - Individual and team Extended DISC® Profiles
 - Group discussion on using this knowledge to make our mission, vision, and values alive
- Leadership attended every retreat

Extended DISC



01

Learn behavioral styles and identify differences

02

Find common language - better understand ourselves and leverage it to work with others

03

Learn how we communicate

04

Understand strengths and blind sides of those around us


Sample Extended DISC® Profiles

Your Team at a Glance

This Diamond demonstrates where the natural behavioral styles of the team members fall on the Extended DISC® Diamond. Each team member's Natural Style is represented by a dot on the Diamond. The positions of the dots correspond to the positions of each individual's Profile II on the Diamond. Determine in what quadrant each member's dot is placed. That is his/her most natural behavioral style (D,I,S, or C).

Team Assessment

Organization: **Finance & Accounting**



Your Team Member at a Glance:

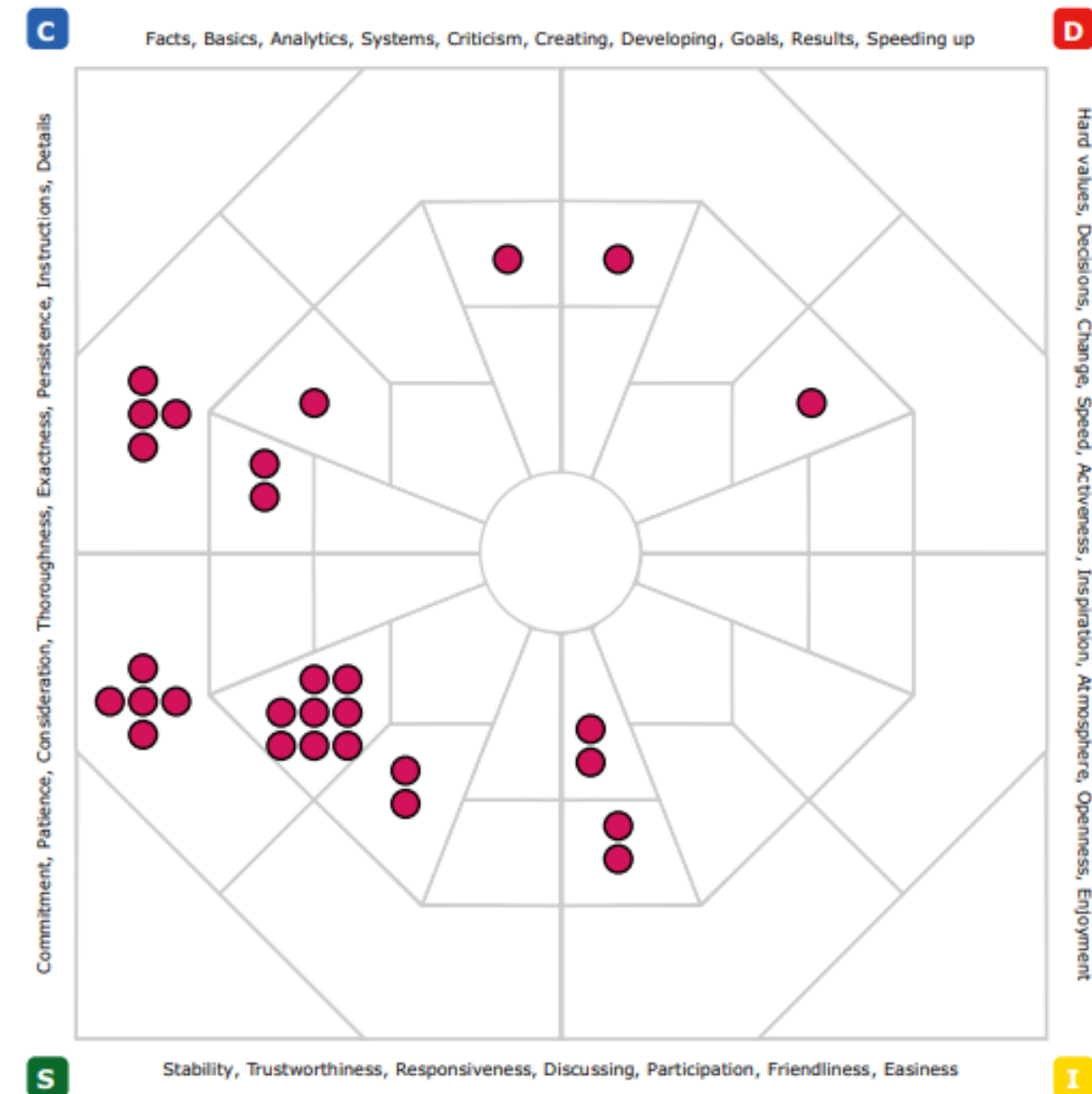
This page is a description of how team members may be perceived by the other team members. Everyone certainly can modify his/her behavior to fit the needs of a particular situation.

Friendly, calm, steady, peaceful, exact, polite, circumstantial, kind, thorough, organized, adjustable, undemanding, patient, concentrating.

Calm, exact, punctual, thorough, logical, organized, modest, adaptive, shy, quiet, considerate, careful, emphasizes instructions, perfectionist.

Practical, thorough, organized, concentrating, exact, logical, decisive, ambitious, self-critical, determined, quiet, shy, considerate, careful.

Polite, pleasant, good listener, understands others' needs, helpful, adjustable, kind, peaceful, discussing, exact, correct, diplomatic, tolerant, concentrating.



Who Could We Become?



**What sort of
experience
will our
customers be
having?**

**What kinds
of services
and resources
will we be
offering?**

**How will we
be interacting
with our
stakeholders
and each
other?**

World Cafe



- Five stations, each one addressing **one of the F&A core values**
- **"Barista" volunteers** from the division to facilitate each station
- Participants stay in **breakout groups** while "baristas" rotate from one room to the next
- Synthesize information into **main themes or most valuable ideas** and share with full group

”

CONTINUE

What are we already doing to cultivate this?

”

STOP

What are we doing that works against it and we should stop?

”

START

What can we start to do that is different or new?

Sample World Cafe Results

Celebrating Us

How do we recognize and express appreciation to each other for doing things well?



Continue

- Townhall meetings
- Meet-and-great meeting/Annual F&A gathering
- Verbally provide positive feedback/thank you people for their great job
- Highlight individual accomplishments during weekly/monthly meetings
- Superior Accomplishment Award
- Monday's meeting to share life experiences to build relationships with our peers.
- Celebrating with food. 😊

Stop

- Being silos in recognizing our members' accomplishment and make other areas aware of them.
- Recognizing only big project contributions, but also recognize small efforts from our team members.
- Resistance to change, value other's people ideas to recognize/appreciate their ways of getting the job done.

Start

- Include Kudos in the Green beans
- Send a thank you email to recognize the top 5 or 10 accomplishments of our team member to the whole division.
- Create a short 2-5 minutes Video to share our accomplishments/express appreciation for doing a great job.
- Digital Townhall meetings to be more connected to learn what is happening with other areas and their accomplishments.
- Have a budget for a small monthly gathering, and not only when people is retiring.
- Raise increase to make it fairly and comparable to the same position with other UF Departments.

Culture of Learning



Continue

- Encouraging cross-training, conferences and in-house training to learn best practices or new ways to solve problems
- Sharing information learned with the team
- Job Shadowing
- CFO Division Scholarship
- Finance Fridays
- Having one team member prepare and present on a task they do: Other members can learn and the employee can practice presenting
- Having team meetings to allow the group to discuss things as a whole and learn from each other (not just work related!)

Stop

- Being afraid to ask questions (and apologizing for asking them)!
- Not wanting to share what you do with other people
- Allowing individuals to remain stagnant – everyone has the ability to grow
- Staying in your comfort zone
- Assuming people should only take training for their current job
- Being overwhelmed with all the Zoom training options (that have increased exponentially)
- Thinking you or your employees do not have time for learning
- Thinking it is only formal learning – it is mentoring, talking, reading, podcasts, etc.!

Start

- More interaction with other depts both in/out division
- Align and spread-out webinars/Zoom trainings
- Publicize and support job shadowing
- Share leader career paths
- Make sure we know what everyone does so transitions are seamless
- Pushing people outside their comfort zone – they will (probably) appreciate it later
- Thinking about who to be 5 years and what we need to learn/change to get there
- Sharing information about other learning options
- Celebrating asking questions
- Communicating your interests to supervisors
- Making it clear that as a division we support all learning

**Have Fun
Together**



pollev.com/emilymoran001



**ENGAGE WITH
THE MISSION**



WE SUPPORT

GROUNDBREAKING RESEARCH

\$1 billion in research equals boundless possibilities. Research at UF advances our understanding of the world in which we live and generates breakthroughs that lead to incredible technological advancements.



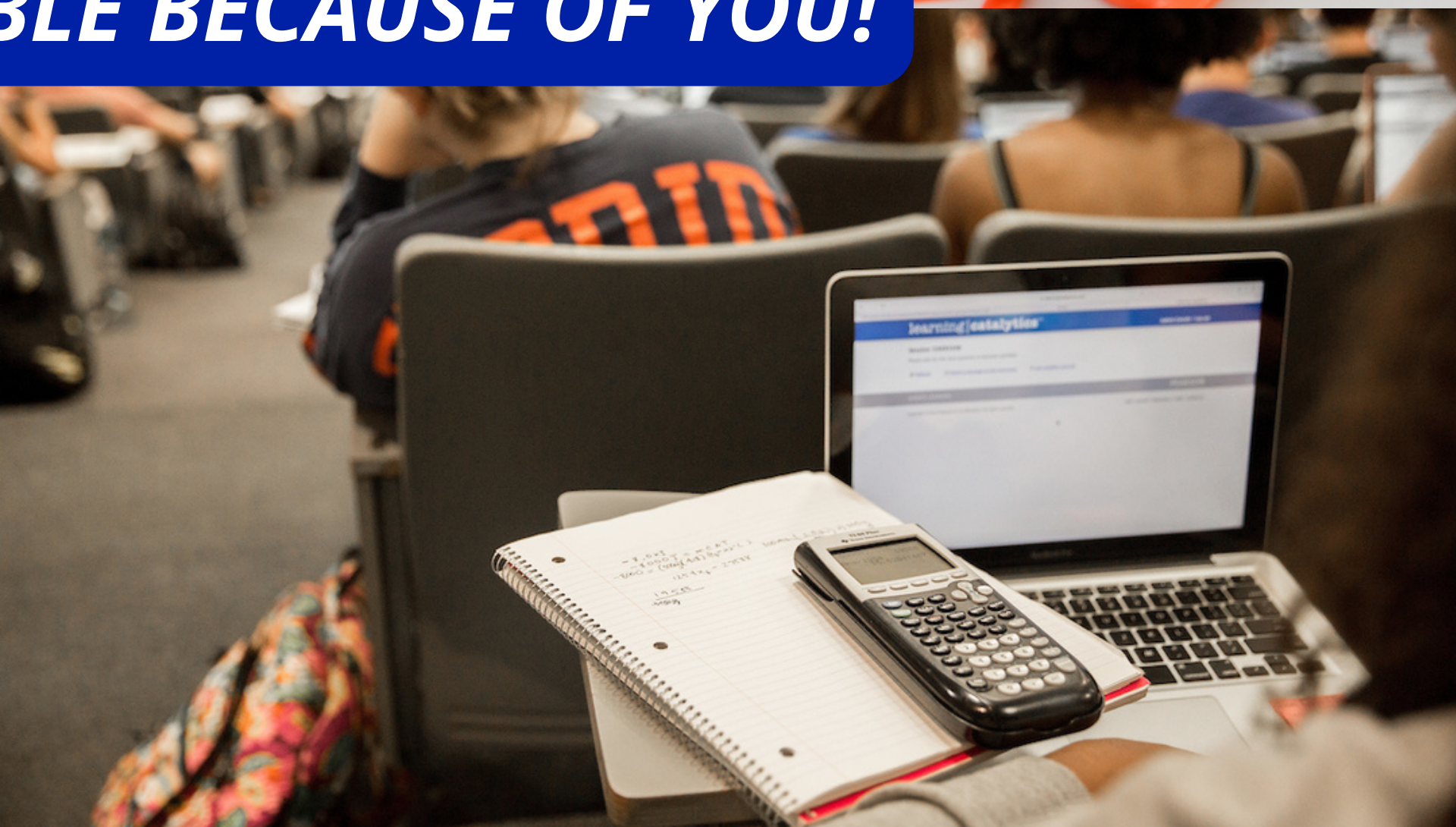
WE BUILD THE UNIVERSITY OF TOMORROW

At UF, our stakeholders rely on us to enhance the resources of our University. We act as stewards for the students, parents, taxpayers, sponsors, and others who entrust us UF assets.

At UF, We Rise Together!



ALL OF THIS IS POSSIBLE BECAUSE OF YOU!



Finance Friday Speaker Program

Mark Your Calendar - Finance Friday Dec 2

Friday, December 2 from 11am–Noon

[F&A Division View Video Announcement - Click Here](#)



[WATCH VIDEO](#)

Join us for Finance Friday, as we learn from **Dr. Verity Mathis, Mammal Collections Manager at the Florida Museum of Natural History**. The mission of the Museum is to understand, preserve and interpret biological diversity and cultural heritage to ensure their generations.



FLORIDA SEA GRANT
SEAGRANT.ORG

FLORIDA SEA GRANT



FIELD & FORK
CAMPUS FOOD PROGRAM
UNIVERSITY OF FLORIDA



Partnership with UF Research

UF Research

FACULTY
Coffee Talk



Anita Marshall | UF Geologist

February 22, 2023
– 8:30 a.m. at Smathers Library East, Room 100 –

UF Research Faculty Coffee Talk

- Alternate between Finance Friday and Faculty Coffee Talk
- Both divisions invited to attend
- Average of 60-75 employees attending each month

Attended at Least One Session





LIVING OUR

SHARED VALUES



Kudos Program

Living The Values

Hi, Emily. When you submit this form, the owner will see your name and email address.

* Required

1. Who would you like to nominate? Please choose the name below *

Select your answer

2. Please choose one of the following core values (pick the value that best matches the achievement) *

Right Results, Right Way - We uphold the highest standards of accountability and integrity by honoring our commitments and taking pride in our work.


Powered by Professionalism - We use our knowledge, technical skills and communication for the benefit of the University of Florida. By valuing all backgrounds, we respect diverse ideas through active listening and showing compassion.

Culture of Learning - We value the development of our employees and are committed to providing opportunities to learn and grow.

Go the Extra Mile - We commit to collaborating with customers and peers. We never settle in anything we do, and we challenge our ideas of what is possible to better serve our customers.

Challenge the Status Quo - We embrace change as a catalyst for continuous improvement by seeking innovative opportunities to become more effective and efficient in all that we do.

- Employees painted a **Living the Values Wall**
- Nominate for a "Kudos" **when actions embody one of the core values**



ALMOST 400
Submissions since beginning
the program

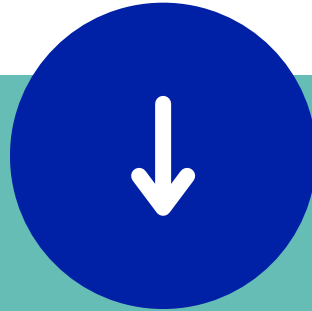
- **Have their Kudo hung on the Living the Values wall for 30-90 days,** depending on the achievement
- Monthly everyone with a Kudo on the wall is **celebrated and entered into a drawing**



**BUILDING
COMMUNITY**

Beginning Connections

By Leveraging Technology



Welcome!



Welcome to the F&A Division Team!

To support our focus on collaboration and knowledge sharing, I am excited to welcome you to the Finance & Accounting Division team! You will receive an email shortly to notify you that you have been added to the "F&A Division" team. We will be using this platform as a hub for our division's communication. General announcements for the division, such as new initiatives, updates, or other important information will be posted

F&A Division Microsoft Team

September's Core Value

Right Results, Right Way

F&A Division With the start of September, we are going to focus on taking off this focus, we are sharing a TED Talk by Luvvie Ajayi Jones, author, "Be comfortable with being uncomfortable." She shares three questions:

October's Core Value Focus

Go the Extra Mile

F&A Division For those that celebrate, happy pumpkin spice season! 🍂😊 With focus on the core value **go the extra mile**. To start this off, we are sharing a TED Talk by Michele Borba, author of "Looking Up: How a Different Perspective Turns Obstacles into Opportunities." Michele shares the idea that we all go through challenges -- some you can see, some you can't.

Core Value Focus

Share Resources & Information

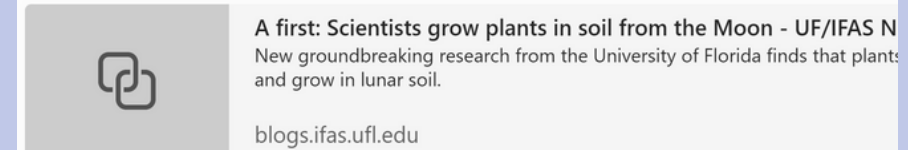
USF Mental Health & Wellness Course

Register today for USF Mental Health & Wellness in the Workplace. Registration is now open for the Mental Health & Wellness in the Workplace course, offered by the [College of Behavioral and Community Sciences](#) and [The Crisis Center of Tampa Bay](#). The course is **free** and open to the public, with the opportunity to earn certification and digital badge by the end of 2023.

A First!

UF Scientists are the FIRST to Grow Plants in Soil From the Moon!
F&A Division I wanted to share this news for those of you who have not seen it. As we do our part in the transactions we are processing, the customers we are helping - this is what we are making.

<https://blogs.ifas.ufl.edu/news/2022/05/12/a-first-scientists-grow-plants-in-soil-from-the-moon/>



UF - Top 5 by US World News

IMPORTANT!
Exciting news!
Hello **F&A Division**, we made it to the TOP 5! Thank you for all your efforts in supporting the F&A Division. To showcase your pride of being a part of UF, here are some Top 5 themed Zoom meetings. We are a part of this success!

Register for Plank and Drank

Plank and Drank 2022
August 1-28
F&A Division This summer heat is brutal, but UF Wellness has just the thing to cool you down and Drank challenge! Complete weekly hydration trackers and challenge yourself to stay hydrated and improve your core strength. Get your favorite water bottle ready - you'll be ready to take on the challenge. [Complete the registration form here.](#)

Whitney Lab Virtual 5K

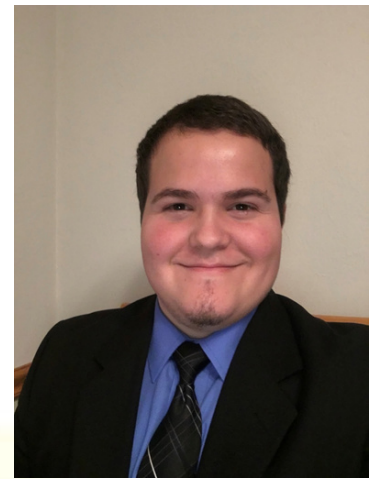
Our friends at Whitney Lab are hosting a virtual 5K! It would be great to get a group together to represent our F&A Whitney Laboratory gift fund, a general fund that provides for the laboratory. You can learn more at: <https://www.whitney.ufl.edu/> Please comment below if you are interested!
[See more](#)

Wellness Opportunities

Good Morning **F&A Division**! There were a lot of good programs and initiatives in the Wellness Newsletter that I wanted to pass along.

- **Everyday Empowerment:** a three-week, text-based campaign of gratitude, mindfulness and connection with others **June 5-25**

Connect with Each Other



Connecting Across Buildings

**VIRTUAL TEAM
LUNCH**



FINANCE & ACCOUNTING

Virtual Winter Lunch

12.1.2022

The banner features a dark blue background with gold decorative elements, including holly leaves and snowflakes. A gold ribbon banner at the top contains the text 'FINANCE & ACCOUNTING'. Below this, the text 'Virtual Winter Lunch' is written in a white serif font, and the date '12.1.2022' is written in a smaller gold font at the bottom.

EMPLOYEES ON THE MOVE

CONGRATULATIONS ON YOUR ADVANCEMENT!



**CALAIS
JOHNSON**

Fiscal Assistant III
Cost Analysis/RPP



**LINDA
SMITH**

Accounting Manager
Payroll Services



**MAYA
JAMES**

Accounting Specialist
Bursar



**PENNY
JACKSON**

Accounting Specialist
Disbursements



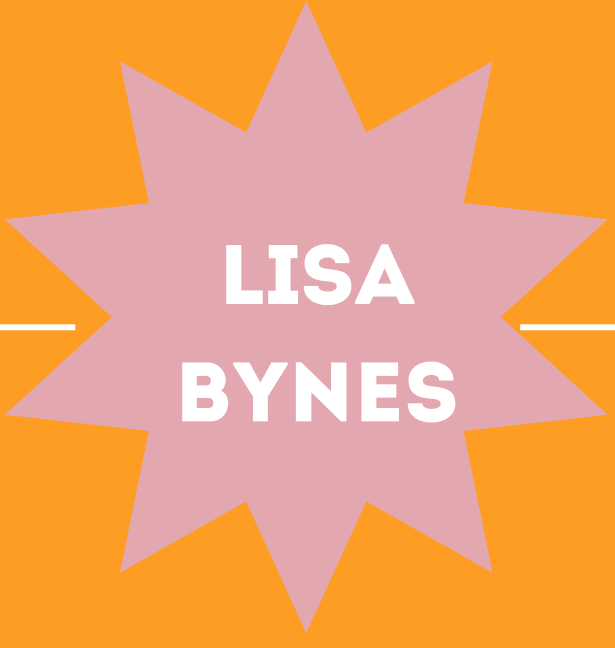
**DAWN
TEAGLE**

Accounting Manager
Payroll Services



**BRENDA
HARRELL**

Associate Controller
Cost
Analysis/RPP/Construction



**LISA
BYNES**

Accounting Specialist
Bursar



**MAGGIE
NOVELLO**

Fiscal Assistant III
Asset Management

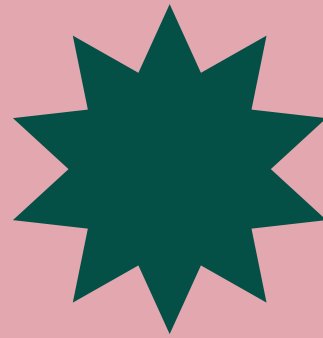


**DAWN
RUSSELL**

Accountant III
Bursar



SERVICE ANNIVERSARIES!



LINDA SMITH

25 years

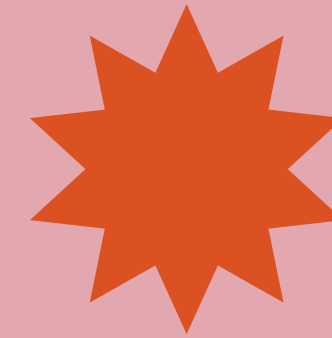
Payroll Services



BARBIE CROMWELL

5 years

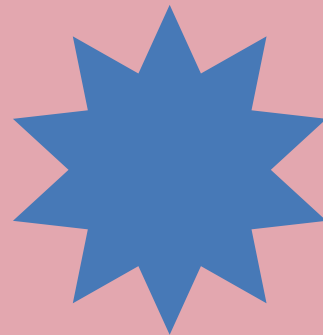
Disbursements



MICHAEL MINCER

15 years

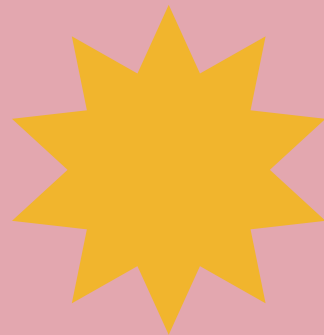
Disbursements



JOHN MURRHEE

5 years

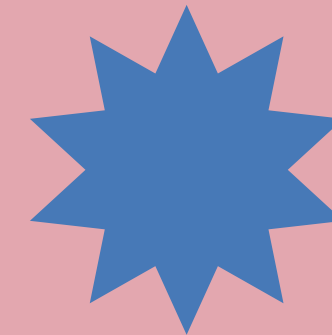
Disbursements



ESTEFANIE PORMATILO

5 years

Disbursements



MICHAEL STRINGER

10 years

Asset Management

Welcome!

F&A NEW EMPLOYEES



HUNTER WILLIAMS

Associate Controller
Bursar



VICTORIA PEPRAH-ASANTE

Associate Controller
Disbursements



ERIC ERNST

Student Account Specialist I
Bursar



SERENA HUGHES

Student Account Specialist I
Bursar



EMILY SLAYDEN

Student Account Specialist I
Bursar



JAMES CICHEWICZ

Student Account Specialist I
Bursar

WELCOME TO OUR NEW STUDENT EMPLOYEES!



KATHERINE

HALEY

EMILY

DAVINA

GUY

BROWN

ODZA

SISOUPHANOUVONG

Bursar

Controller's Office

Controller's Office

Controller's Office

MICHELE

ROSE

JOSE

DAIRON

JUSKOWITZ

TERMIDOR

SIMON

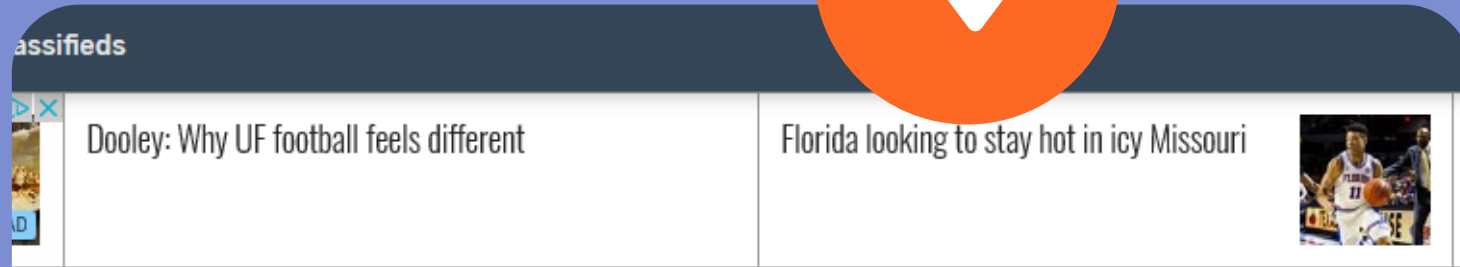
CASTELLANOS

Bursar

Bursar

Asset Management

Asset Management



COMMERCIAL BREAK







ENABLING

GROWTH

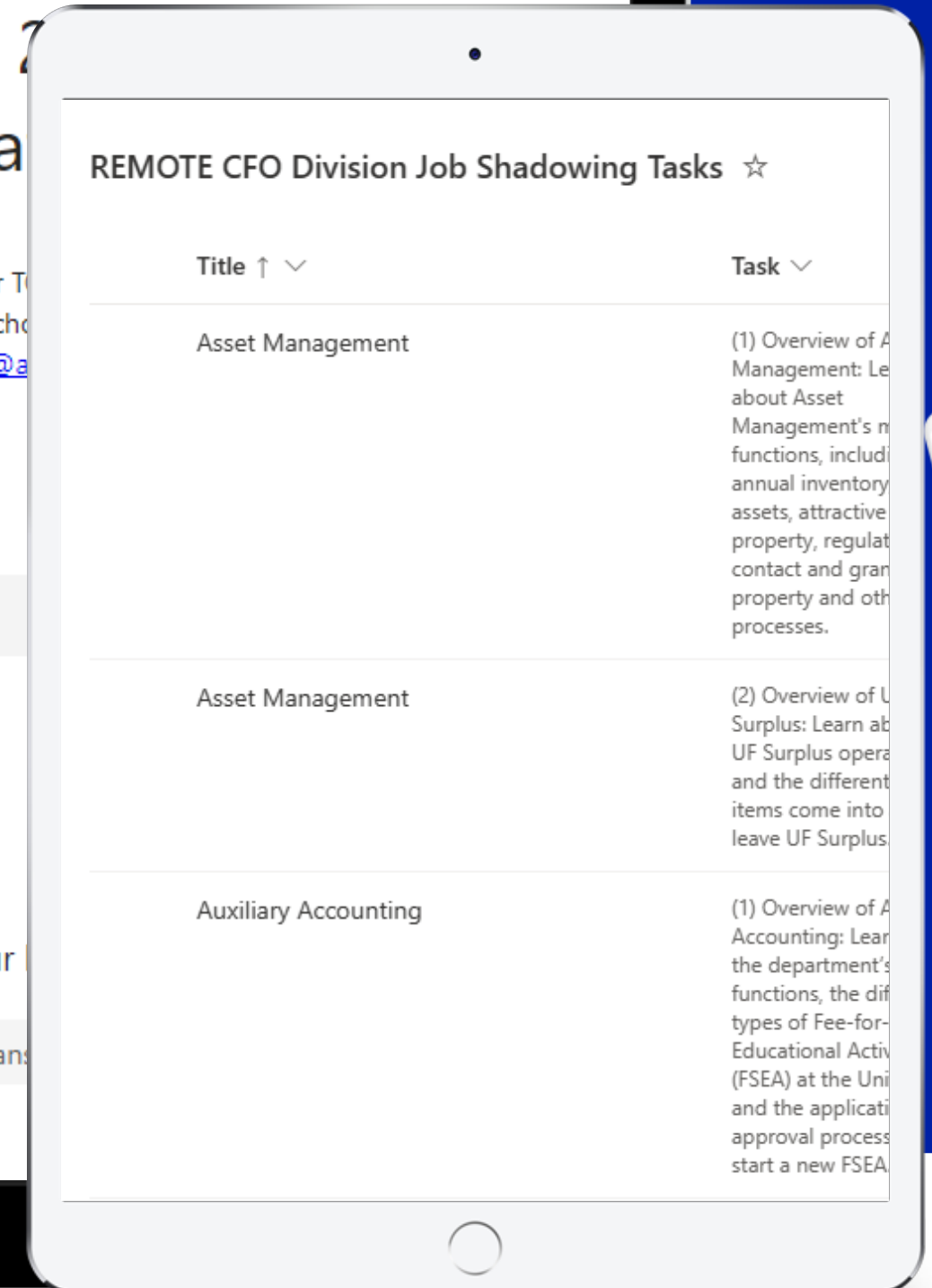
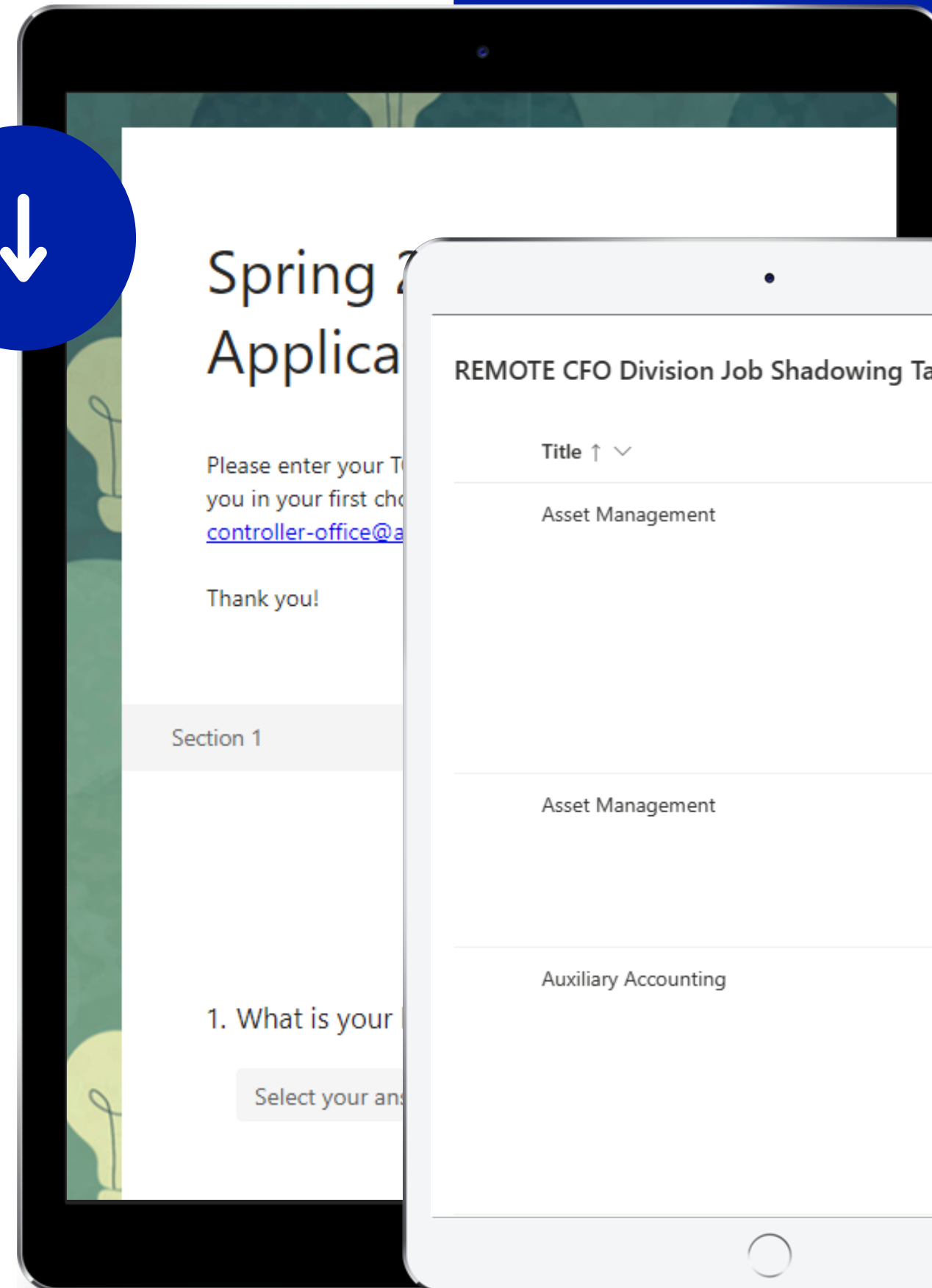
CFO Division Job Shadowing

- Average session length 1-2 hours
- High level understanding of divisional functions
- Break down silos
- Help people see interaction between our departments
- Encourage a culture of learning from each other!

Attended at Least One Session



GOAL: Expand program to include campus departments and other core offices



CFO Division Scholarships

Culture of Learning



Funded by Employees Through Foundation

One-time donations or payroll deduction; annual support from CFO



Any Degree Non-Need Based

Any level or type of degree - does not need to be related to current position



Awarded Fall/Spring Up to \$225

Division leadership awards based on number of eligible applicants

Provide Opportunity Internally

Find ways to keep our people!



Rotation Program

- Break down silos within teams and departments
- Increase broad divisional knowledge

Temporary Assignment

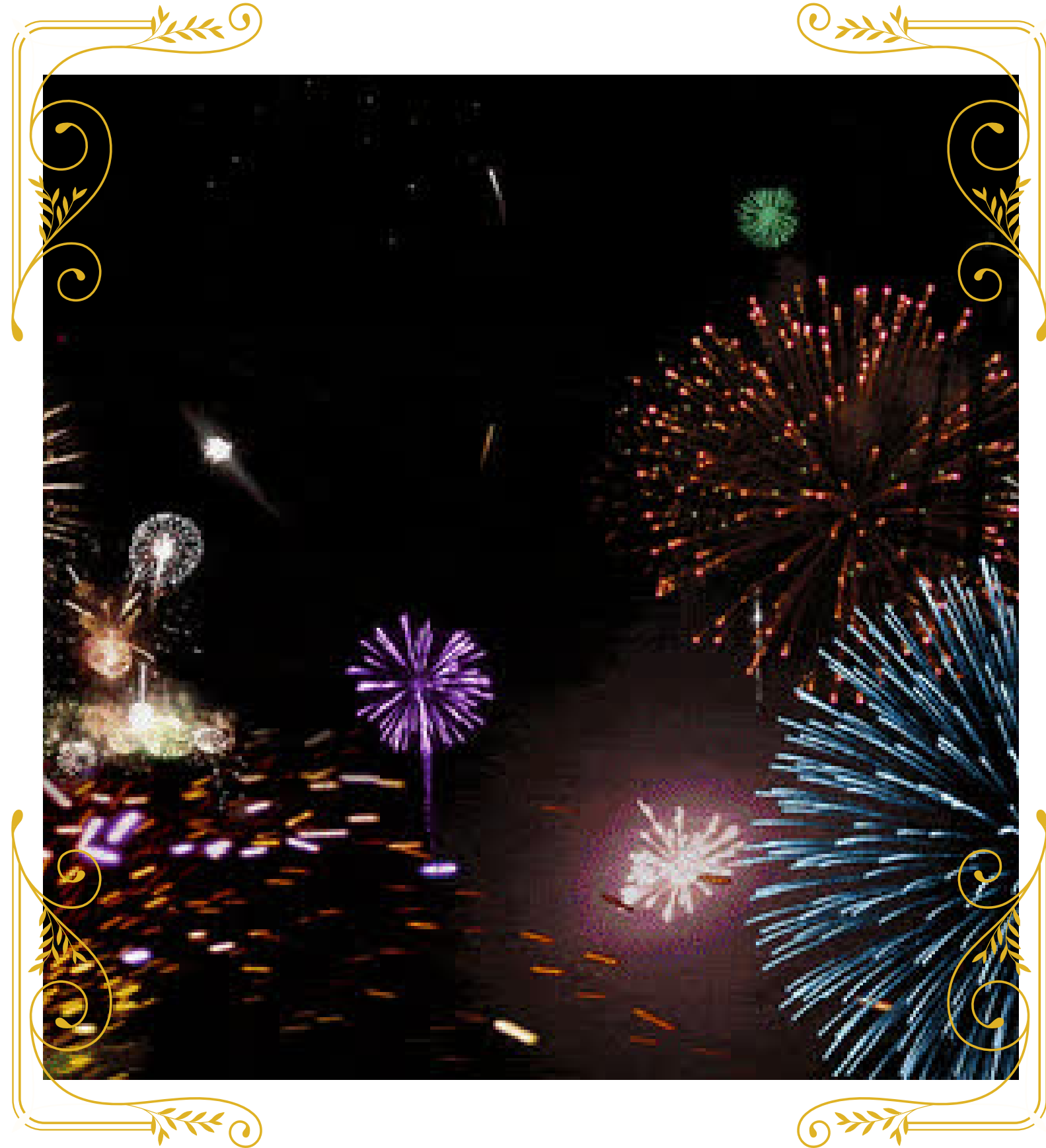
- Try out position to see fit for both employee and manager
- Expand knowledge of offerings within division

Talent Sharing

- Reduce turnover impact
- Expand partnerships throughout the division



CELEBRATING SUCCESSES



Let's Celebrate Each Other!



Let's take a minute to shout out our coworkers!

Ray of Sunshine

These people are all about bringing positive energy to the workplace. The culture-building superstars are the ones who uplift and encourage their team consistently.





Rise and Shine

These are the employees who burst onto the work scene every morning with enough energy to be like a living cup of coffee for your team. This ray of sunshine sets the tone for the rest of the workday!



CFO Division Quarterly Progress Report

Q2 of Fiscal Year 2023



PARTNERSHIPS

Together we design collective, holistic solutions to complex challenges

1

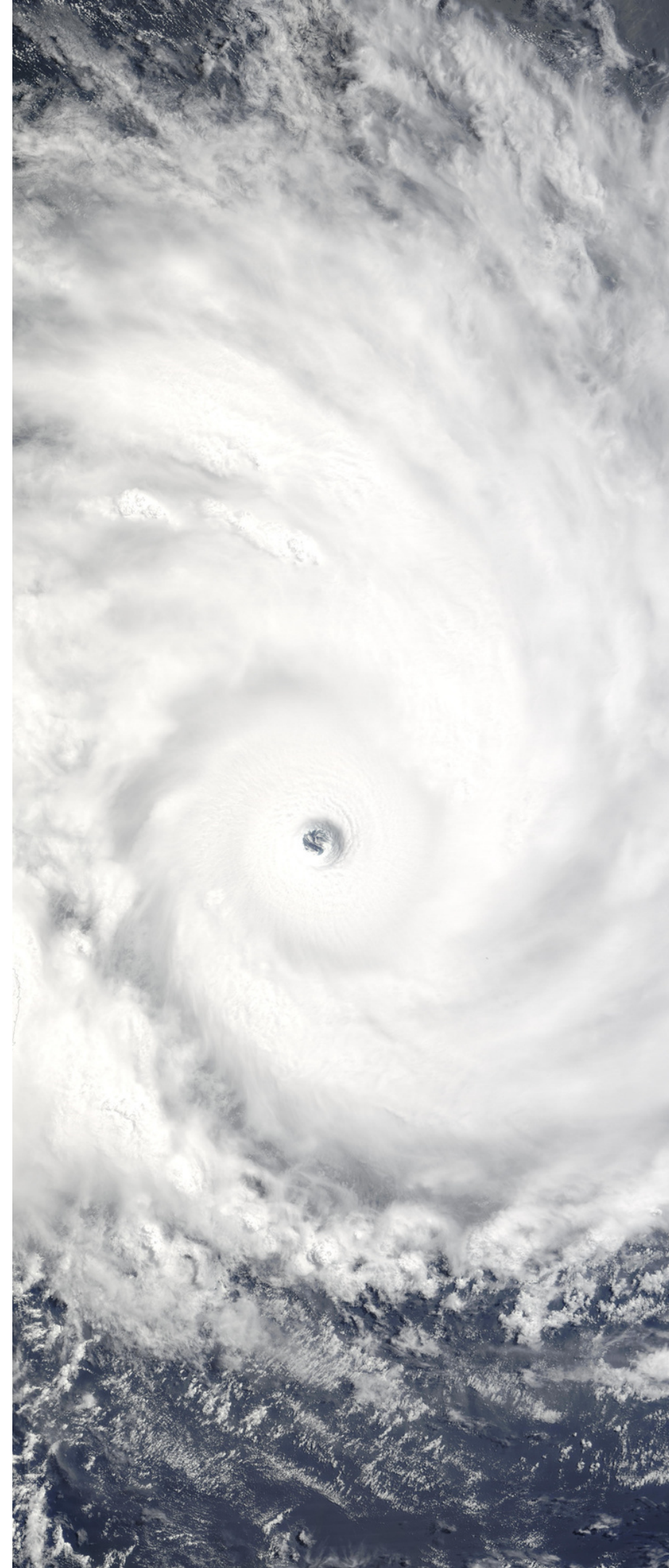
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HURRICANE IAN

Due to Hurricane Ian, the payroll closing process was consolidated from an entire week into 2.5 days. Payroll Services collaborated with **HR, UFIT**, and **staff across the UF enterprise** on this accelerated closing from Friday to Wednesday.

The teamwork involved in this was truly impressive! In Payroll Services, everyone jumped on whatever task was needed without hesitation. Across the enterprise, our partners worked to get their employees time entered and approved before the deadline, HR sped processing of hire and additional pay ePAFs and UFIT ran additional ad hoc processes.

**WHILE THE HURRICANE BROUGHT A LOT OF WORRIES,
THANKS TO EVERYONE'S HARD WORK, MISSING A
PAYCHECK WAS NOT ONE OF THEM.**





TALENT

Developing staff and fostering future leaders

Stakeholder Impact

Job well done! She took the time to create a very detailed report. By far, this is the most information we have received and we are very appreciative of her doing this for us!

UF Parent

Wow, I'm so proud of you all to start working on this new process. I'm so looking forward to seeing alternative options available to campus. Thank you for your hard work!

Department Fiscal Staff

This is a landmark day for UF & me! Can't begin to say how much this will benefit my department, not just time saving, also the safety of our employees by not transporting cash.

Department Fiscal Staff

Her service is always perfect! We over at the Health Compliance Office appreciate all her effort!

Department Fiscal Staff

Nothing else needed - great customer service!

Department Fiscal Staff

She went above and beyond to help me. She listened to my problem and reached out to multiple departments to resolve my issue. She followed up with me by phone and email to ensure I had the proper documentation to fix my problem. All the while, she spoke professionally about her coworkers, was kind to me, and answered all my questions. I really hope she can be recognized.

UF STUDENT

The trainer is a very good speaker and delivers the information clearly. 3 hours flew by.

DEPARTMENT FISCAL STAFF

My experience was the best experience I have had with any institution in the past year. He responded professionally and timely AND went above and beyond by anticipating my next question and providing instructions before I actually sent another email asking the questions!

UF SUPPLIER



INNOVATION

Envisioning possibilities to create impactful solutions

A photograph of a brick building with a large yellow sculpture in the foreground. The sculpture consists of several thick, intersecting beams. In the background, a brick building with multiple windows is visible. A few people are walking on a paved area in front of the building.

IMPROVED REPORTING OPTIONS FOR CAMPUS

The Center for Excellence added the **Comprehensive Projected Payroll Report** to the Comprehensive Financial Report Suite. In collaboration with UF Research, UFIT, and Payroll Services, this report provides new capabilities for reporting. **The new report is the first to allow users not only to prompt on all ChartFields or Project/Award values, but also pulls employees using either job data home department or distributed department.** This allows users to see either all individuals funded by a particular cost center or how all individuals within a particular department are funded.

Additional reports are currently in development as we continue to support data efforts across the enterprise.



**LET'S
CELEBRATE
OUR
SUCCESS!**

Celebration Claps



LET'S CHEER!



AAAAAAAH!



fa.ufl.edu

THANK YOU!

Emily Moran
emoran@ufl.edu

Rachel Victoria
rachelstern@ufl.edu