

**Council of Senior Business Administrators
Training Workshops
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Texas A&M University has a council composed of thirty-eight senior business administrators representing both academic and administrative areas. The Council, formed by individuals from units dedicated to improving the business-related processes across the University, has no direct reporting to any administrative unit. This council has been especially active in the last five years creating a network of communication and cooperation among its members providing much needed training to both business administrators and support staff in the 250 departments on campus. The first training workshop presented in March 1999 and funded by the individual departments was attended by almost 200 employees. Overwhelming positive feedback lead the Council to establish an annual training program that includes two workshops per year addressing the various business training needs from entry level novices to the more experienced employees. Sessions provided cooperatively by all areas of the University are presented in a timely fashion to provide information on changes in process and in governing rules and regulations needed to effectively run the operations. Within the past year, their importance was noticed by administration, and funding will now be provided to the Council of Senior Business Administrators for this University-wide endeavor.

Past topics include:

Intermediate Budgeting

Unrelated Business Income Tax

Introduction to Payroll

Year-End Accounting

Advanced Payroll

Property Training

Foreign Nationals Journey: H-1Bs and Beyond: Part

TAMU 101 (newcomers)

Sales and Receivables

Getting ahead at A&M

“Keep it up. These are the best training opportunities on campus.”

Texas A&M University, the state's first public institution of higher education, is a land-grant, sea-grant and space-grant institution opened in 1876 and located in College Station, Texas. President Robert Gates leads the University with an enrollment of over 45,000 students studying for degrees in 10 academic colleges. There are 225 departments on campus that handle the day-to-day business operations of this large institution. The university has a decentralized approach to these business operations.

Texas A&M University has a council composed of thirty-eight senior business administrators representing both academic and administrative areas. The Council of Senior Business Administrator (CSBA), formed by individuals from units dedicated to improving the business-related processes across the University, has no direct reporting to any administrative unit. In existence for over 15 years, this council has been especially active in the last five years creating a network of communication and cooperation among its members. It is through this networking that many common University-wide issues were identified. The greatest of these was the need to provide specific business-related training to administrators and support staff in the 225 departments on campus. There were training opportunities available on campus for many subjects, but for overall training in the business affairs area, there were no avenues. More direct hands-on training was needed. Through the cooperation and hard work of the CSBA members themselves, the Training Workshops were born. Covering a wide variety of topics designed to address essential learning needs of business and administrative staff across the Texas A&M University campuses, these workshops were originally funded by contributions from the academic colleges but were offered and continue to be offered free to attendees. University administration has recognized the success of these workshops

and now funds them centrally. First presented in March 1999 and attended by almost 200 people, they boast an attendance exceeding 300 participants twice yearly. As a sampling of the variety of topics offered, these sessions were offered this past spring:

Intermediate Budgeting - This presentation by the Assistant Vice President of Finance gave a brief overview of Budget Basics followed by a discussion of FY2003 Budget Preparation and a look at the "Big Picture" of the Texas A&M University budget. It was felt that having a clearer understanding of budgeting issues at the University level would benefit business staff at all levels of experience. Common budget errors were explained and Frequently Asked Questions were discussed.

Property Training – Presented by the Property Manager and Fiscal Trainer, this session guided participants through the process that starts with the purchase of an asset to inventory. Past problems with managing inventory has made property training a major issue in some departments, and this session was particularly timely.

Unrelated Business Income Tax – Presented by a Fiscal representative, this session was designed to educate departments on income tax issues facing colleges and universities. Examples of activities that may generate Unrelated Business Income were provided and how the University reports these activities to the IRS was explained.

Foreign Nationals Journey: H-1Bs and Beyond: Part 1 – Presented by the Director of International Services, this session provided a general introduction and analysis of

nonimmigrant and immigrant visas processes. Recent changes at the INS have added importance to this particular subject, and this session provided a method by which the most up-to-date information could be communicated to a large number of people.

Introduction to Payroll Services – Presented by the Director of Payroll Services and a Payroll Trainer, this session provided an overview for new employees working with payroll related functions or anyone wanting to learn more about Payroll Services. Our organization and its basic operations were described, and resources now available on the University website were introduced.

TAMU 101 (newcomers) – Presented by a CSBA member, this session provided business support staff with a basic knowledge of University structure and department functions to carry out their daily duties. This "class" was specifically developed to flatten the learning curve of the newest business support staff (and a few more experienced staff) by teaching them how to conduct business at Texas A&M.

Year-End Accounting – Presented by a Fiscal representative, this workshop covered the "why's" of year-end processes and explained year-end terminology, forms, processes, and year-end FAMIS transactions. The timing (Spring) was excellent, especially for anyone closing the books out for the first time.

Sales and Receivables – Presented by Fiscal representatives, this session provided basic instruction on the use of Cash Deposit, Interdepartmental Transfer, and Accounts

Receivables forms. Also, basic concepts, terms and audit rules of Financial Management Services and Sales and Receivables department were taught.

Advanced Payroll – Presented by the Director of Payroll Services, this session was designed for the more experienced payroll personnel with recent and upcoming improvements being the main focus of the session.

Getting ahead at A&M – Presented by a CSBA member, this session was designed to help business staff move into an "advancement" mindset and to put them on the forward moving track. Whether their plans were to remain in a current position or to look for a change all together, the session shared tips on how to “get out of a rut” and to get ready for new challenges.

January 2003 topics include Purchasing Invoice Problems, Funding of Higher Education in Texas, Tips and Advice for Reconciling Statements, Personnel Records and HUB Vendors.

Feedback from the workshops has been overwhelmingly positive. As you can see, there are many different sessions covering a variety of topics related to the day-to-day business conducted in the university departments. The Training Workshops have gained popularity with both new employees and supervisors who see it as an excellent training tool for their staff. Because of the success of this program and the fact that the Workshops reach a large number of people, the CSBA has had many requests from

administrative areas to use the Training Workshops as a location to which they can bring their own presentations.

Evaluations are collected at each workshop and feedback is used to form the next workshops' agenda. This process shows that the Council listens to attendees and uses what they say. The goal of the workshops is to give training that is needed by the departments – and who knows better what is needed than the departmental personnel.

The benefits we see from these workshops is a better trained staff who is able to deal with the multiple demands on their time. The documents that are submitted to administrative areas are done correctly the first time, requiring they are only touched once and not multiple times for correcting errors. The staff is also able to promote from department to department with the basic knowledge that is needed for every department's operations. Finally, the networking aspect and personal contact at these workshops with the presenters who are themselves business support people and members of CSBA provides for better, more comfortable communication among departments.

One future goal CSBA has as related to these workshops is to present a certification for training that would follow the career ladder currently in place for business staff. Ideally, levels of training will be written into the requirements for movement within the career ladders.

This training is something that we, the Council of Senior Business Administrators, saw as a need that would not be fulfilled without action on our part. We stepped in to meet that need. As members, we must present ourselves as leaders and role models for those who will come behind us. By providing this training, we are helping to build the future administrators of Texas A&M University.