

The Finance and Administration Academy
Developing future managers at the University of Florida
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UNIVERSITY OF
FLORIDA

Abstract

The University of Florida launched a new Finance and Administration Academy for the 2001-2002 fiscal year.

Created for the professional development of employees in UF's Office of Finance and Administration, the academy aimed to develop future managers by increasing participants' knowledge of the Office of Finance and Administration, focusing in particular on how it supports the university's academic mission and quality of life for the Gainesville community.

In addition to monthly meetings with members of the community and university administrators, participants shadowed high-level university officials, networked with one another, and completed assignments. Although participation in the academy does not guarantee future promotional opportunities, it serves as a training and leadership tool.

Employees from the university's Office of Student Affairs also were invited to participate in the 2002 academy to foster partnership and cooperation.

"We're extraordinarily pleased to see this program get off the ground," said Ed Poppell, vice president for Finance and Administration at UF. "We hope the academy will provide these energetic employees with the foundation to better understand and appreciate executive decision-making and processes at the university level while preparing them for potential leadership roles."

Introduction of the Organization

UF President: Charles E. Young

Vice President for Finance and Administration: John “Ed” Poppell

The University of Florida is a major, public, comprehensive, land-grant, research university. The state's oldest, largest, and most comprehensive university, UF is among the nation's most academically diverse public universities, with a long history of established programs in international education, research, and service. As of the year 2000, it was one of only 17 public, land-grant universities belonging to the Association of American Universities.

In 1853, the state-funded East Florida Seminary took over the Kingsbury Academy in Ocala. The seminary moved to Gainesville in the 1860s and later was consolidated with the state's land-grant Florida Agricultural College, then in Lake City. In 1905, by legislative action, the college became a university and was moved to Gainesville. Classes first met with 102 students on the present site on September 26, 1906. The University of Florida opened its doors to women in 1947 and was integrated in 1958. As of the year 2000, with more than 43,000 students, Florida was the sixth largest university in the nation.

In 1985, Florida became a member of the Association of American Universities, the prestigious higher-education organization composed of the top public and private institutions in North America. Florida offers more programs on a single campus than all but a few U.S. universities. A land-grant university with a distinguished record of developing Florida agriculture through research and extension services, Florida is among the nation's leading research universities as

categorized by the Carnegie Commission on Higher Education. Florida has 23 colleges and schools and more than 100 research, service, and education centers, bureaus, and institutes. More than 100 undergraduate majors are offered. Nearly 1,600 freshmen and sophomores participate in the honors program, which offers 60 to 80 honors courses per semester. Most classes are limited to no more than 25 students. The Graduate School coordinates almost 200 graduate programs. Professional degree programs include dentistry, law, medicine, pharmacy, and veterinary medicine. There are approximately 11,500 faculty and staff members.

Statement/Restatement of the Initiative

The University of Florida's Finance and Administration Academy is a program designed to prepare employees for higher-level responsibilities at our university.

Sponsored by Ed Poppell, Vice President for Finance and Administration, this academy was designed to increase participants' knowledge of the Office of Finance and Administration as a whole and how it supports the University's academic mission and the quality of life for the Gainesville community. Participation in the academy is not a guarantee of future promotional opportunities. Instead, this academy is a training and leadership tool.

Design

In February 2001, Ed Poppell, Vice President for Finance and Administration at the University of Florida, called for the creation of an academy that would become a training and leadership tool for developing future managers. Based on suggestions from directors throughout Finance and Administration, he asked for an academy that included competitive selection criteria; a small

class that consisted of up to 12 members; formal curriculum that included budgeting, accounting, law and rules, enrollment management, town/gown relations, governance and UF organization; job shadowing; and a final report. Training and Development in the Division of Human Resources was tapped to develop, launch, and coordinate.

Based on Training and Development's experience as well as on the input provided by the vice president's office and his directors, an academy was developed and proposed.

Because adults benefit from having influence over what and how they learn, general parameters were provided; however, participants were also expected to assert control over much of the experience. To help build leadership, the academy provided opportunities to demonstrate such.

Implementation

Nominations to participate in the Academy were accepted throughout the month of October 2001. To participate, employees had to be employees in Finance and Administration or Student Affairs and meet additional criteria:

In general, participants had to be:

- Goal oriented.
- Willing to assume responsibility for their own growth and development.
- Actively engaged in seeking challenging assignments and greater responsibility.

Participants were responsible for:

- Attending all scheduled meetings or making alternative scheduling arrangements when conflicts were unavoidable.
- Actively participating in those meetings.
- Completing assignments between meetings.
- Working with fellow participants to develop a report at the conclusion of the academy.

Candidates for the academy also had to meet the following criteria. At a minimum, they had to have:

- Supervisory support.
- At least two years of experience in a decision-making or management position at UF.
- Satisfactory performance reviews and attendance records.

Any eligible employee who wished to participate could nominate him- or herself by submitting an academy application first to his or her divisional director. This application was then forwarded to the Academy Coordinator for review by a selection committee.

Supervisors also could nominate employees who had the potential to grow and develop additional skills by submitting a letter to the Academy Coordinator via their divisional director who then would obtain a completed application from the nominee. See the addendum (page 8) for a detailed summary of implementation-related issues.

Benefits

Participants benefited from the Academy experience by obtaining:

- An increased understanding of high-level issues that affect the University of Florida (managerial, legal, academic, community) as well as an increased understanding of the governance processes and systems in place on our campus.
- A better appreciation of the relationship between Finance and Administration and other areas on campus. This was enhanced by networking and teamwork experienced by the participants.

The organization also benefited. The knowledge base acquired by participating in the academy will help create more competitive applicants for managerial roles within the division and enhance their ability to assume leadership positions at the University of Florida.

Retrospect

The Finance and Administration Academy is now entering its second year in 2003. The Academy was very successful. Based on the evaluative comments provided by the participants, they all experienced personal and professional growth as a result of the Academy experience, and they all recommended that it continue to be provided.

Some changes to the criteria have been made. This year, to participate, employees must be exempt employees in Finance and Administration or Student Affairs. Assistant directors and

above are not eligible to participate. We also will be adding some activities to further round out this opportunity.

Addendum

Finance and Administration Academy

**A program designed to have a positive effect on the
readiness of employees for higher-level responsibilities at the
University of Florida**



**UNIVERSITY OF
FLORIDA**

**Training and Development
University Personnel Services
University of Florida
Fall 2001**

Finance and Administration Academy

Goal: To develop future managers at the University of Florida by increasing participants' knowledge of the Office of Finance and Administration as a whole and how it supports the University's academic mission and the quality of life for the Gainesville community.

This academy is designed to have a positive effect on participants' readiness for higher-level responsibilities at the University of Florida. Participation, however, is not a guarantee of future promotional opportunities. Instead, this academy is a training and leadership tool.

**Benefits to
Participants:**

Participants will benefit from:

- An increased understanding of high-level issues that affect the University of Florida (managerial, legal, academic, community) as well as an increased understanding of the governance processes and systems in place on our campus.
- A better appreciation of the relationship between Finance and Administration and other areas on campus. This will be enhanced by networking and teamwork experienced by the participants.

The knowledge base acquired by participating in the academy, in turn, will help create more competitive applicants for managerial roles within the division and enhance their ability to assume leadership positions at the University of Florida.

Structure:

Participants will meet each month with various representatives from the University and Gainesville community. Some meetings/activities will be the same for all participants. Other times, participants may choose from a list of sources based on their individual interests and scheduling needs. In all cases, members of the participant group will be responsible for scheduling the identified meetings as part of their academy experience, to include coordinating among the group for acceptable dates, times, and locations. This responsibility typically will rotate among group members, with assistance from the Academy Coordinator. Time commitment will range between four and twelve hours each month.

Participation in the academy will last approximately eleven months and will conclude with a comprehensive group report to the Vice President for Finance and Administration that outlines observations as well as any group recommendations.

An Academy Coordinator will be appointed who will provide general guidance/oversight for this group. Because adults benefit from having

influence over what and how they learn, general parameters will be provided; however, participants will be able, and will be expected, to assert control over much of the experience. Each participant's experience, therefore, will have some points of commonality to ensure that the academy's goal is achieved. However, each individual's experience also will be unique to take into account the participant's professional development needs, personal interests, and aptitudes. To help build leadership, the academy will provide opportunities to demonstrate such.

Participation:

In general, participants must be:

- Goal oriented.
- Willing to assume responsibility for their own growth and development.
- Actively engaged in seeking challenging assignments and greater responsibility.

Participants will be responsible for:

- Attending all scheduled meetings or making alternative scheduling arrangements when conflicts are unavoidable.
- Actively participating in those meetings.
- Completing assignments between meetings.
- Working with fellow participants to develop a report at the conclusion of the academy.

Candidates for the academy must meet the following criteria.

At a minimum, they must have:

- Supervisory support.
- At least two years of experience in a decision-making or management position at UF.
- Satisfactory performance reviews and attendance records.

The candidate also must be a USPS or A&P employee in the Office of Finance and Administration or Student Affairs.

Once nominated, the candidate must complete an application that expresses his or her interest in participating. Ten participants will be chosen each year. A committee, composed of the Finance and Administration directors, will make a selection of eight participants based on applicant competitiveness. The Vice President for Student Affairs will nominate an additional two participants.

**Nomination
Process:**

Any USPS or A&P employee in the Office of Finance and Administration who wishes to participate may nominate him- or herself by submitting an academy application first to his or her divisional director.* This application will then be forwarded to the Academy Coordinator for review

by the selection committee. *The Vice President for Student Affairs, who will make two academy appointments directly, will identify the process for Student Affairs employees.

Supervisors also may nominate employees who have the potential to grow and develop additional skills by submitting a letter to the Academy Coordinator via their divisional director. Candidates also may be nominated by any manager or supervisor who has experience with assessing their potential. These individuals may do so in a letter to the Academy Coordinator, again via the appropriate divisional director. The Academy Coordinator will then obtain a completed application from the nominee.

Finance and Administration Academy Schedule

**Academy
Welcome/
Reception:**

Welcome and introductions by the Vice President for Finance and Administration.

Description of meetings/activities to be held over the next 11-month period.

Q/A period

*The following sequence is only a recommendation
and may be altered based on scheduling needs.*

Month 1:

Activity One:

Participants will complete a DiSC profile (Carlson Learning), facilitated by the Academy Coordinator. This is a work-behavior assessment profile that can assist the participant in identifying similarities and differences in work-behavior patterns. This information will be used in the academy meetings as the participants learn to work with one another and gain insight into their own behaviors at work.

Action Plan:

To be scheduled by the Academy Coordinator as part of an orientation meeting.

Activity Two:

Attend a special meeting with the Finance and Administration directors. This meeting will be designed to provide the participants with an overview session to include an organizational review. (This may be incorporated into the DiSC meeting above.)

Action Plan:

To be scheduled by the Academy Coordinator.

Participants will individually identify questions for the directors.

Activity Three:

“Job shadow” members of the Vice President for Finance and Administration's Office.

Action Plan:

Participants will individually schedule time (one 4-hour block) to “job shadow” one of the following. Participants may choose whom to shadow; however, each of the following shall be shadowed by no more than a quarter of the total academy participants.

- Bob Miller
- Ed Poppell
- Fred Cantrell
- Katie Joiner

This is an individual activity; however, participants should schedule a group meeting prior to the job shadowing to develop their learning objective(s).**

A follow-up meeting to “debrief” also will be scheduled by the Academy Coordinator to discuss what was observed, etc., to ensure learning objectives were achieved.

***Moving forward, e-mail may substitute for certain group meetings, based on the preference of the academy participants.*

Months 2 & 3: Budgeting, Accounting, and Other Administrative Topics

Activity One:

Meet with Vice President Poppell and Katie Joiner, Assistant Director, UF Budgets, for overview of budget process (rules, organization, funding, etc.) at UF/Finance and Administration.

Action Plan:

One participant will be responsible for working through the Vice President for Finance and Administration's Office to schedule this meeting. Participants will individually identify questions for the meeting.

Activity Two:

Job shadowing of Finance and Administration directors.

Action Plan:

Participants will individually schedule time (4-hour blocks) to "job shadow" three of the following. Participants may choose whom to shadow; however, each of the following shall be shadowed by no more than a total of two participants in a month.

- Jim Morgan, Business Services
- William Properzio, Environmental Health and Safety
- Carol Walker, Facilities Planning and Construction
- John Kruczek, Finance and Accounting
- Tom Thomas, Information Systems
- Ed Gilbert, Operations Analysis
- Larry Ellis, Personnel Services
- David O'Brien, Physical Plant Division
- Everett Stevens, University Police Department
- Emily Hamby, Purchasing
- Faylene Welcome, Small Business and Vendor Diversity
- Lionel Dubay, O'Connell Center

This is an individual activity; however, participants should schedule a group meeting prior to the job shadowing to develop their learning objective(s).

At least one follow-up meeting to "debrief" will be scheduled by the Academy Coordinator to discuss what was observed, etc., to ensure learning objectives were achieved.

Activity Three:

Scheduled Workshop

Participants will attend a public speaking workshop, sponsored by University Personnel Services.

Month 4:

Activity One:

Vice Presidents' Participation

Participants will attend a meeting with two UF vice presidents (to be rotated among the vice presidents each year based on schedule availability) as a way to review and discuss the University's academic mission.

Action Plan:

One participant will be responsible for working through the Vice President for Finance and Administration's Office to schedule a meeting with two UF vice presidents (for example, the Vice President for Health Affairs and the Vice President for Research and Graduate Programs).

Participants will schedule a group meeting to develop their learning objective(s) for attending the meeting.

Group will attend meeting as scheduled.

Activity Two:

Scheduled Workshop

Participants will attend a leadership workshop (part of a new leadership series), sponsored by University Personnel Services.

Month 5:

Student Concerns/Enrollment Management

Activity One:

Participants will meet with Bill Kolb and Steve Pritz (and/or other members of their offices) from the Office of Admissions and the Office of the University Registrar to discuss student admissions and enrollment issues.

Action Plan:

Participants will individually identify questions/agenda items for the proposed meeting.

Participants will schedule a group meeting to review questions and narrow scope for the meeting.

One participant will assume responsibility for scheduling the meeting and share the agenda, in advance, with that office.

Group will meet as scheduled.

Activity Two:

Participants will attend a Student Affairs Staff Meeting or other suitable substitute.

Activity Three:

Participants also will attend a Student Government Meeting.

At least one follow-up meeting to “debrief” will be scheduled by the Academy Coordinator to discuss what was observed, etc., to ensure learning objectives were achieved.

Month 6:

Activity One:

President/Provost’s Participation

Participants will meet with the President and Provost to discuss questions related to the University’s structure, growth targets, and challenges.

Action Plan:

Participants will individually identify questions/agenda items for the proposed meeting with the President/Provost.

Participants will schedule a group meeting to review questions and narrow scope for the meeting.

One participant will assume responsibility for scheduling the meeting (or meetings) and share the agenda, in advance, with the President/ Provost.

Group will meet with President/Provost. One coordinated meeting or two separate meetings may be scheduled.

Activity Two:

Scheduled Workshop

Participants will attend a business writing workshop, sponsored by University Personnel Services.

At this mid-point in the “academy experience,” any gaps, changes, etc., will be identified and pursued (to be facilitated by the Academy Coordinator). As appropriate, a group project may be identified and assigned as a complement to the final report that will be provided to the Vice President for Finance and Administration at the close of the academy 11-month participation period.

Month 7:

Activity One:

Town/Gown Relations

Participants will choose to attend one of the following meetings/activities designed to heighten understanding of the University's relationship to the City of Gainesville.

- Attend Gainesville City Commission Meeting
- Attend Alachua County Commission Meeting
- Tour Gainesville Regional Utilities Facilities (including a meeting with the Utility Finance Director to explain the General Fund Transfer)
- Attend Metropolitan Transportation and Planning Organization (MTPO) Meeting
- Attend University Land Use Facilities Planning Advisory Committee

Action Plan:

This is an individual exercise; however, participants should schedule a group meeting to coordinate "who is going where" and to discuss learning objectives.

Activity Two:

Scheduled Workshop

Participants will attend a communication workshop, sponsored by University Personnel Services.

Month 8:

University Governance

Participants will attend the two following meetings. *(This activity may need to be switched to another month depending upon when these meetings are scheduled.)*

- Attend a University Board of Trustees Meeting
- Attend a Faculty Senate Meeting

Action Plan:

Participants should schedule a group meeting to discuss learning objectives.

One participant will assume responsibility for coordinating the group's attendance at a University Board of Trustees Meeting; another will be responsible for coordinating the group's attendance at a Faculty Senate Meeting.

A follow-up meeting to "debrief" will be scheduled by the Academy Coordinator to discuss what was observed, etc.

Month 9:

Activity One:

Attend a Finance and Administration Directors Meeting.

Action Plan:

Participants will individually identify questions for the directors.

Activity Two:

Affirmative Action

Participants will meet with Vice Provost Jacquelyn Hart or other members of her office to discuss related issues.

Action Plan:

Participants will individually identify questions/agenda items for the proposed meeting.

Participants will schedule a group meeting to review questions and narrow scope for the meeting.

One participant will assume responsibility for scheduling the meeting and share the agenda, in advance, with that office.

Group will meet with Dr. Hart, Affirmative Action.

Activity Three:

Scheduled Workshop

Participants will attend a workshop on empowerment (part of the new leadership series), sponsored by University Personnel Services.

Month 10:

Group will begin working on a comprehensive report to the Vice President for Finance and Administration that outlines observations as well as any group recommendations based on their experiences in the academy. This report is to be submitted by month's end. The Academy Coordinator will facilitate as needed. **Any missed session and/or meeting should be "made up" during this month if an alternative arrangement has not already been pursued.** An individual evaluation of the academy program also will be solicited.

Month 11:

Wrap-Up Meeting and Graduation

Finance and Administration Academy Application

You have been nominated to participate in the University of Florida's Finance and Administration Academy. (Self-nominations are accepted.) The goal of this academy is to develop future managers at the University of Florida by increasing participants' knowledge of the Office of Finance and Administration as a whole and how it supports the University's academic mission and the quality of life for the Gainesville community.

This academy is designed to have a positive effect on participants' readiness for higher-level responsibilities at the University of Florida. Participation, however, is not a guarantee of future promotional opportunities. Instead, the academy is designed to be a training and leadership tool.

To participate, you must have your supervisor's support, indicated via the signature block at the bottom of this application. You also must have:

- At least two years of experience in a decision-making or management position at UF.
- Satisfactory performance reviews and attendance records. (Please attach a copy of your most recent performance review to this application.)

The successful candidate also must be goal oriented, willing to assume responsibility for his or her own growth and development, and actively engaged in seeking challenging assignments and greater responsibility.

Please attach a brief essay (no more than two pages), in which you explain why you are interested in participating in the academy and why—given the above characteristics—you believe you would be a good candidate for the academy.

Please read the following statement and sign this application.

I understand that if I am selected to participate in the Finance and Administration Academy, I will be responsible for attending all scheduled meetings or making alternative scheduling arrangements when conflicts are unavoidable; actively participating in those meetings; completing assignments between meetings; and working with fellow academy participants to develop a report at the conclusion of our participation.

Candidate's Name (Please print or type): _____

Signature: _____ Date: _____

Next, please obtain the following signatures to indicate supervisory support:

Immediate Supervisor's Name (Please print or type): _____

Signature: _____ Date: _____

Appropriate Director's Name (Please print or type): _____

Signature: _____ Date: _____

Once you receive your supervisor's signature and that of the appropriate director if different please forward this application to the Finance and Administration Academy Coordinator, Training and Development, University Personnel Services, PO Box 115006. Please remember to attach a copy of your most recent performance review to this application.