AFD Business Connection

Background and Purpose

Open Forum

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- Background – A changing campus
  - New employees
  - Existing employee with new responsibilities
  - New or refocused priorities at all levels
  - Changes in policies, processes, systems
  - Requests from campus staff for training
  - Requests from management for training
  - Training always recognized as needed
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- Background, continued
  - Web pages difficult to find or not updated
  - Training resources not available, not coordinated, or not well communicated
  - Department internal transfer of institutional knowledge not feasible - those people aren’t there
  - Lot of separate discussions, no coordinated action
■ Goals

- Help campus employees be successful
  - Campus departments and central business areas
  - Know where to go for help and provide consistent answer to the questions
- Be able to receive help when/how needed
- Give support, build partnerships
- Reduce rework
- Reduce frustration
Goals, continued

- Align policies and processes
  - Outreach process disrupts complacency
  - Drives discussion and assessment
  - Through assessment, intentionally develop efficiencies with strategic use of resources, ease of use, consistency

- Explain why, ask questions, understand why
  - Critical component to successful partnership
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Who

- New employees
- Current employees with changing/new responsibilities
  - Department Heads
  - Promotions
  - Program or task oriented re-org
- Supervisors/managers who want to understand their staff’s processes and duties
- Employees who infrequently perform a task
- Employees who did not get trained, or were not given an opportunity to understand the WHY to begin with
- All affected by policy, process and priority changes
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- **What**
  - Must fit experience/responsibility of the departmental employee
  - Must be accessible
  - Must be sustainable and predictable
  - Include the following areas
    - AFD Business Services
    - AFD Human Resources
    - Cal Poly Corporation Business Services
    - Cal Poly Foundation business and finance staff
  - Leverage institutional knowledge and staff experience
Coming Together

- Formalize the initiative - make it a project
- Collect information throughout
- Add key players
  - Staff from business service offices
    - Phase 1 – Financial staff: Fiscal Services, BABS, C&P, CPC, CPF
    - Phase 2 – HR, other AFD business areas
- Stay with it
  - Tell people about it
  - Schedule an open forum
  - Manage scope
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CORPORATE DILEMMA
WHAT IF WE TRAIN THEM AND THEY LEAVE?
WHAT IF WE DON'T... AND THEY STAY?

INVESTING IN EMPLOYEES

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