Division of Fiscal Affairs

"A program for getting your performance competency skills in balance"

A Title III Activity
Florida A&M University

Division of Fiscal Affairs
Training Program

Letter from CFO, Vice President, Fiscal Affairs

Guiding Principles for Fiscal Affairs
Division of Fiscal Affairs Training Program

Learning and Development Advisors
Course Descriptions

Training Calendar
Registration Procedures

Participants' Documentation
“Commitment of Agreement” Form
Registration Form
Advisement Form

Notes
TO: Division of Fiscal Affairs Staff

FROM: CFO and Vice President
Division of Fiscal Affairs

DATE: February 26, 2007

SUBJECT: Fiscal Affairs Training Program

I am extremely pleased to inform you of the new Division of Fiscal Affairs (DFA) Training Program which I recently approved for implementation. The DFA Training Program is uniquely designed to offer employees an opportunity to obtain the requisite skill sets necessary for performance enhancement, professional growth and development and to improve the delivery of customer services.

The program is the culmination and product of a collaborative effort between the Human Resources Organizational Development and Training Department and the senior management of DFA. The program curriculum consists of 17 Core Curriculum courses, which are to be completed by all employees, as well as seven Information Technology Courses and seven Workplace Environment Courses. The curriculum has been carefully crafted to incorporate best practices in adult learning and state of the art methods and techniques utilized in today’s business and financial arenas.

Employees are expected to complete a minimum of four courses per year as recommended and mutually agreed upon by employees and their immediate supervisors. Upon completion of all program requirements, employees will receive their official program certification and (CEU’s) Continuing Education Units will be awarded as applicable.

As an advocate of employee professional development, I believe the DFA Training Program offers many benefits and incentives to our employees, including increased opportunities for upward mobility and career advancement, and improved technological skills. The added benefit to the University includes increased productivity, improved customer services and external customer relationships, and retention of a knowledgeable and continually developing workforce.
I trust that you will share my enthusiasm and support for this training program that has been custom-designed just for you. I look forward to your direct feedback to me or through the course program evaluations, so that we can ensure future programs respond to your needs and/or suggestions for improvement.

*Remember, knowledge is power!*
# Table of Contents

WELCOME ............................................................................................................................................... 5  
OVERVIEW .............................................................................................................................................. 5  
EMPLOYEE BENEFITS .......................................................................................................................... 5  
A QUICK GLANCE ................................................................................................................................ 6  
TRAINING PROGRAM CURRICULUM ...................................................................................................... 7  
   I. Core Curriculum ............................................................................................................................... 8  
   II. Information Technology .................................................................................................................. 8  
   III. Workplace Environment ............................................................................................................... 8  
QUESTIONS ABOUT THE PROGRAM ................................................................................................. 9  
DIVISION OF FISCAL AFFAIRS LEARNING AND DEVELOPMENT ADVISORS ........ 11
### “Guiding Principles for Fiscal Affairs”

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A.</td>
<td>Maintaining accounting records in accordance with Generally Accepted Accounting Principles (GAAP)</td>
</tr>
<tr>
<td>B.</td>
<td>Maintaining an internal control environment that enhances sound business practices and clearly defines roles, responsibilities, and accountability.</td>
</tr>
<tr>
<td>C.</td>
<td>Ensuring that employees have appropriate knowledge of applicable laws, University regulations and policies governing the fiscal affairs of the University.</td>
</tr>
<tr>
<td>D.</td>
<td>Ensuring that business and financial activities of the University are conducted in accordance with applicable laws, University regulations and policies</td>
</tr>
<tr>
<td>E.</td>
<td>Ensuring timely, reliable, and complete reporting of business and financial activities to all applicable University stakeholders.</td>
</tr>
<tr>
<td>F.</td>
<td>Promoting strategic and tactical planning to enhance the efficient and effective use of resources and improve the quality of decision-making.</td>
</tr>
<tr>
<td>G.</td>
<td>Involving internal and external parties (such as accounting professionals, auditors and governing bodies), as appropriate to provide periodic independent oversight of University business and financial activities.</td>
</tr>
<tr>
<td>H.</td>
<td>Promoting an environment that does not condone unethical business practices and employee behavior through a code of conduct for professional, business and financial practices.</td>
</tr>
<tr>
<td>I.</td>
<td>Generating and implementing business and financial policies and procedures, within the context of these Guiding principles.</td>
</tr>
<tr>
<td>J.</td>
<td>Promoting an environment that encourages employees to report suspected fraudulent or dishonest acts and deviations from these Guiding Principles.</td>
</tr>
</tbody>
</table>
The Division of Fiscal Affairs Training Program provides results-based learning and performance outcomes to successfully transform Human Performance Improvement and Learning initiatives to acceptable standards as recognized by The American Society for Training and Development (ASTD). The program focuses on improving performance by providing opportunities to increase individual knowledge and skills and organizational performance in relation to organizational goals.

The program has seven essential career learning and development objectives:

- Developing New Skill Sets
- Improving Staff Performance
- Learning and Performing in Today’s Workplace
- Adding Value to Advance Goals
- Succeeding One Step at a Time
- Talent Acquisition
- Developing a Learning Process
- Standardizing Operations

Required training will be identified and provided for each employee in the Division.

The curricula for the seven essential career development objectives were developed to promote adherence to the “Guiding Principles for Fiscal Affairs” approved by the FAMU Board of Trustees.

Employees requiring special accommodation and Americans with Disabilities Act (ADA) compliance must contact The Office of Equal Opportunity Programs at (850)599-3076 at least five (5) days prior to training.

© 2007 Created by Florida A&M University Organizational Development and Training
Welcome
Welcome to the Division of Fiscal Affairs Training Program designed for the Fiscal Affairs staff at Florida A&M University (FAMU). The program offers a wide variety of courses to choose from. Courses are offered during the day and several are via eLearning. In addition, employees will receive Continuing Education Credits (CEUs) to ensure that they stay abreast of professional requirements and colleagues.

Overview
FAMU is offering a first time Fiscal Affairs training program. Specifically designed to meet the needs of Fiscal Affairs employees, the Fiscal Affairs Training Program will provide FAMU employees with opportunities for professional growth and development. Information in the area of fiscal affairs learning and development environment has been assessed and a program has been carefully crafted for FAMU employees. Sessions and activities are developed to present effective strategies for achieving optimal performance in fiscal areas of responsibility. Each employee will have the opportunity to obtain the prestigious Florida A&M University Fiscal Affairs Professional Development Certificate to document successful completion of their program.

A FAMU Fiscal Affairs Professional Development Certificate can assist you in various ways, including:

♦ Remain at the leading edge of your field
♦ Attain cross-functional knowledge in a new area of your operation
♦ Engage in building a continuous business process guide for optimum performance

Eligibility Criteria
Only FAMU employees who meet the following conditions of employment are eligible to participate in the program:

♦ Must be an employee in the Division of Fiscal Affairs or University Fiscal Representatives
♦ Must have approval from immediate supervisor to participate

Employee Benefits
♦ Professional Development Skills
♦ Promotional Opportunities and potential growth
♦ Basic and Advanced Technological Skills
Cross-Function Job Development
♦ Talent Management

* Participants will be assigned a learning and development advisor to facilitate and monitor their progress in the Program. Please contact the Human Resources Organizational Development and Training Department at 850-412-5150 for additional information.

A Quick Glance
Fiscal Affairs Training Program Requirements

Coursework
All courses and supervisory assignments require successful completion by participants.

Assessment
Throughout each instructor-led or e-Learning course, employees must complete a knowledge proficiency assessment at the 80% level.

Projects
It is highly recommended that the participants’ immediate supervisors provide at least one (1) job related task to demonstrate the application of program content in the workplace.
Course Descriptions
The DFA Training Program consists of seventeen (17) core curriculum courses, Seven (7) information technology courses and seven (7) workplace environment courses. Most courses are instructor-led and require classroom attendance; but, a select few are offered via e-Learning. The coursework provides a thorough, systematic approach to professional development by combining technological skills with proven practical techniques. The course descriptions are included in Tab Three of this booklet.

The goal of the DFA Training Program is to incorporate the best practices in adult learning techniques with practical work experiences.

Employees must complete at least four (4) courses per year based on supervisory recommendation and approval.

Core Curriculum Courses

- Basic Accounting
- Best Practices in Accounts Payables
- Budgeting & Commitment Control
- Charts of Accounts
- Documenting Fiscal Policies and Procedures
- Document Retention
- Ethics/Conflict of Interest
- eProcurement Business Processes
- Fiscal Reporting
- General Ledger
- Invoice Resolution Workshop
- Managing Financial Expenditures
- Risk Management
- Sarbanes Oxley Act of 2002
- Understanding Financial Statements
- Strategic Planning
- Travel and Expenses Business Processes
Information Technology Courses

- Financial Management Business Processes
- Student Administration Business Processes
- Human Resources Business Processes
- Microsoft Suite
  - Microsoft Access
  - Microsoft Excel
  - Microsoft PowerPoint
  - Microsoft Word

Workplace Environment Courses

- Change Management
- Communication Skills
- Customer Service Skills
- Telephone Etiquette Skills
- Management Skills for Supervisors
- Sexual Harassment/Protective Class
- Stress Management
Questions about the DFA Training Program:
What is the DFA Training Program?
The Division of Fiscal Affairs Training Program is a tool developed especially for FAMU employees within the Division of Fiscal Affairs. The program will afford employees the opportunity to obtain career building and hands-on practical skills. It provides technological information required to function effectively in their current position while enhancing career learning and development skills.

How does it work?
The Program consists of thirty-one (31) courses, knowledge proficiency assessments, and work-related projects.

Is this program only for FAMU employees?
Yes. DFA Training Program is a tool developed specifically for FAMU Fiscal Affairs employees.

Do I need supervisory approval to participate in this program?
Yes. Instructor-led courses are offered during work hours; therefore, supervisory approval is required to attend all courses during duty hours.

How do I register for the Program?
You can register by contacting Human Resources, Organizational Development & Training (ODT) at (850) 412-5150.

Will the Program notify staff when training will be held?
Yes. Employees will be notified of training dates, times, locations and topics as follows:
- FAMmail
- Organizational Development and Training Department’s Training Calendar located at http://www.famu.edu/about/admin/vpad/odt/
- Electronic announcements

Do I have to buy books for the required readings?
No. The Office of Organizational Development & Training will supply materials and required literature.
If I have questions about a project, whom should I ask?

You should refer questions about a project to the ODT Staff or your immediate supervisor.

How much does the program cost?
The program is free to all FAMU Fiscal Affairs employees.

How many courses are there in the DFA TRAINING PROGRAM?
There are thirty-one (31) comprehensive sessions of Instructor-led and e-Learning applications.

What happens after an employee completes each course?
Individuals earn the DFA Training Program certificate of completion; Continuing Education Units (CEUs) and University-wide recognition.
Fiscal Affairs Learning and Development Advisors

The Office of Organizational Development and Training has assigned Fiscal Affairs Learning and Development Advisors to all Division of Fiscal Affairs staff. The staff may contact their advisors in reference to fiscal learning and performance development, requests for course transcripts and other training needs.

<table>
<thead>
<tr>
<th>Employee Category</th>
<th>Fiscal Development Advisors</th>
<th>Contact Information</th>
<th>Office Hours</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executives</td>
<td>Gloria Taylor</td>
<td>Perry-Paige, Suite 105 North 412-5150</td>
<td>8:00 a.m. 5:00 p.m.</td>
<td><a href="mailto:gloria.taylor@famu.edu">gloria.taylor@famu.edu</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Perry-Paige, Suite 105 North 412-5149</td>
<td>8:00 a.m. 5:00 p.m.</td>
<td><a href="mailto:sherrye.earst@famu.edu">sherrye.earst@famu.edu</a></td>
</tr>
<tr>
<td>A - M</td>
<td>Sherrye Earst</td>
<td>Perry-Paige, Suite 105 North 412-5150</td>
<td>8:00 a.m. 5:00 p.m.</td>
<td><a href="mailto:bridget.roberts@famu.edu">bridget.roberts@famu.edu</a></td>
</tr>
</tbody>
</table>
# FISCAL AFFAIRS

<table>
<thead>
<tr>
<th>1.</th>
<th><strong>Basic Accounting</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>This course is designed to assist learners with understanding the purpose of accounting records both within organizations and for use by external parties. In addition, it also covers the main accounting concepts and how they form the basis for GAAP.</td>
<td></td>
</tr>
<tr>
<td>At the end of this course, participants will be able to:</td>
<td></td>
</tr>
<tr>
<td>- Recognize the importance of the accounting language.</td>
<td></td>
</tr>
<tr>
<td>- Describe the three main types of accounting information.</td>
<td></td>
</tr>
<tr>
<td>- Apply the “principles” of accounting and GAAP, in addition to University’s “Guiding Principles for Fiscal Affairs”.</td>
<td></td>
</tr>
<tr>
<td>- Recognize the three types of accounting reports required by GAAP.</td>
<td></td>
</tr>
<tr>
<td>- Identify and apply the 12 key accounting concepts</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2.</th>
<th><strong>Best Practices in Accounts Payable</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>The Accounts Payable industry isn’t what it used to be and nothing has changed it more radically than the implementation of Sarbanes-Oxley. Then there’s 1099 reporting and Sales and Use Tax regulations. In this essential session you’ll discover the most critical aspects of every A/P regulation and where you could be at risk.</td>
<td></td>
</tr>
<tr>
<td>At the end of this course, participants will be able to:</td>
<td></td>
</tr>
<tr>
<td>- Apply best practices that other A/P professionals are implementing to reduce the turn-around time on the invoicing process and eliminating the potential for duplicate payments.</td>
<td></td>
</tr>
<tr>
<td>- Research strategies that other A/P professionals following to keep the master vendor file clean and up to date and to reduce the cost and/or time to process vendor payments</td>
<td></td>
</tr>
<tr>
<td>- Apply Sarbanes-Oxley compliance standards to AP operations</td>
<td></td>
</tr>
<tr>
<td>- Incorporate “Guiding Principles for Fiscal Affairs”</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3.</th>
<th><strong>Budget &amp; Commitment Control</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Gain technology skills and knowledge to interpret commitment control, exception handling and early warning notification and notification process, budget exceptions commitment control terminology. Enter commitment control budgets, journal entries and view budget transaction information.</td>
<td></td>
</tr>
<tr>
<td>At the end of this course, participants will be able to:</td>
<td></td>
</tr>
<tr>
<td>- Demonstrate the ability to access departmental ledgers</td>
<td></td>
</tr>
<tr>
<td>- Demonstrate the steps in reviewing budget details</td>
<td></td>
</tr>
</tbody>
</table>
4. **Change Management**

Organizations typically encounter daily pressures to maintain position and focus within ever evolving and demanding markets. Senior executives, middle management, and employees must address and implement processes and strategies if they are going to stay on top of the marketplace. Visionaries are usually found within every organization, effective change management becomes an ordered and deliberate process. It involves elemental steps in delivering the hoped for outcome that will yield success for the organization.

At the end of this course, participants will be able to:

- Manage formatting, styles, and printing in Microsoft Word
- Describe the three formal models of change
- List reasons why people resist change
- Demonstrate how to positively handle people who resist change
- Describe how you can handle change in the future
5. **Charts of Accounts**

The chart of accounts is a course that identifies all accounts in the general ledger. The session covers information relevant to defining reference numbers and various account utilized by the University. In addition, this course identifies the set of codes used to classify and record financial transactions in meaningful ways. It enables reporting and provides a framework for understanding the financial results of FAMU’s operations. At the end of this course, participants will be able to:

- Explain FAMU’s Chart of Accounts (CoA) is and how it is used
- Identify the basic structure and it codes
- Explain how naming conventions, ranges and list of value are used

6. **Communication Skills**

Because workplace communication is essential, participants will learn the process of both oral and written communication. They will review basic writing techniques including using e-mail and writing memoranda. A portion of this course will be devoted to verbal communication including meeting and greeting the public.

At the end of this course, participants will be able to:

- Identify goals of communication
- Identify the challenges associated with communication
- Recognize ways people communicate with others
- Recognize the three stages of the listening process

7. **Customer Service Skills**

Customer Service Skills will help participants review and define customer service standards for the organization and the individual; develop skills for listening and calming oneself and others; explore options for resolving issues with realistic expectations; and gain techniques to maintain perspective and equilibrium. Participants will learn to make sure that all the points of customer contact occur in the best way possible.

At the end of this course, participants will be able to:

- Demonstrate professionalism on the job by building a proactive,
8. **Document Retention**

This course is designed to provide information about the maintenance, retention, storage, and disposal of records. In addition, this course will provide training on the laws that govern the maintenance, retention, storage, and disposal of documents. Records Coordinators will have direct knowledge to successfully manage and retain documents efficiently.

At the end of this course, participants will be able to:

- Apply concepts of document management and retention policies and procedures
- Identify, locate, and utilize procedures for communication of revised policies and procedures
- Apply document management and retention life cycle process for appropriate records, as follows:
  - Conduct inventory of records
  - Process and label records storage boxes accordingly
  - Coordinate with State Records Management Liaison to transport and process records boxes appropriately
- Acquire knowledge of custodial mandates, maintenance, preservation and retention of public records

9. **Documenting Fiscal Policies and Procedures**

This course is designed to gain hundreds of rules, strategies, guidelines and shortcuts that will make your job easier and ensure you get the results you want—well-written policies and procedures that are read and understood by all.

At the end of this course, participants will be able to:

- Define policy, procedure, and standard
- Explain why the development and enforcement of polices and
procedures are important to all University employees.

- Examine the relationship of the University's policies and procedures and local, state, and federal laws.
- Locate important policies by using the Appendix or Table of Contents

### 10. eProcurement Business Processes

eProcurement is the process of procuring items through the purchasing process at FAMU. In this course, employees will learn how to effectively and efficiently apply current business processes.

At the end of this course, participants will be able to:

- Identify and implement the processes of creating requisitions utilizing current business processes
- Locate saved requisitions and receive items
- Complete budget checking procedures
- Identify and apply “Guiding Principles for Fiscal Affairs”

### 11. Ethics/Conflict of Interest

A growing concern in the workplace centers around what is right and what is wrong. In this course, participants will be taught how to establish a code of ethics for the workplace. Ethical group discussions, work related scenarios, and the outcomes on positive decision-making will be reviewed.

Topics will include handling confidential information, conflicts of interest, personal use of organizational property, gifts and favors, outside employment, reporting ethical concerns, and proper accounting of hours worked, expenses, and other relevant issues.

At the end of this course, participants will be able to:

- Make good ethical work related decisions
- Establish values to implement good work related ethical decisions
- Demonstrate and promote the impact of good ethical work related values and outcomes of good decision making
- Identify and apply “Guiding Principles for Fiscal Affairs”
12. **Financial Management Business Processes**

Oracle's PeopleSoft Enterprise Financial Management Solutions (FMS) can help you gain visibility into business-critical information, strengthen financial discipline and governance best practices, and realize efficiencies by automating and standardizing key business processes. These applications integrate with other solutions across departmental lines to help you implement departmental and industry best practices for all of your business processes.

At the end of this course, participants will be able to:

- Accounts Payable
- Assets Management
- Commitment Control
- General Ledger

---

13. **Fiscal Reporting**

Produce accurate, comprehensive, concise and understandable fiscal financial reports for your office. Generate fiscal financial reports to cover a desired reporting period, compare actual to date with budgeted figures and note variances.

At the end of this course, participants will be able to:

- Interpret the process of delivering accurate fiscal reports in a timely manner
- Process, produce, analyze and monitor office fiscal reports
- Report fiscal findings to related to job functions
- Produce and format fiscal data to appropriate administrators

---

14. **General Ledger**

General Ledger is the process of managing the institutional and departmental budget. Allowing the end-users to view budget activities and create queries of all activities. It is the recording of transactions within business units and between multiple independent business units.

At the end of this course, participants will be able to:

- Describe the process of accessing departmental ledgers
- Define the procedures to review budget details
- Identify the steps to drill down to transactional data
- Provide information to make financial decisions
- Provide data to prevent commitments and expenditures from
### 15. Human Resources Business Processes

Oracle's PeopleSoft Enterprise Human Resources delivers comprehensive HR capabilities, from workforce management to compensation and talent management. Extensive business process automation and rich self-service capabilities free HR teams to perform value-added services while reducing operational costs. Within each module is several business processes developed for each of the University’s business units. Access to these modules is determined by roles and security profiles. Your security profile consists of your User ID and your password. Together, they determine your access to applications and pages. When you log on the system, your security profile determines which applications you can use, records you can access, pages you can view, actions you can perform, and which default values will appear.

At the end of this course, participants will be able to:
- Human Resources Workforce Administration
- Human Resources Time and Labor
- Human Resources Benefits
- Payroll
### 16. Invoice Resolution

This course is designed to provide guidance in processing invoices related to official University purchases. Participants will interact with representatives from various Departments responsible for completing the cycle necessary for prompt vendor payments. Instructions and clarification will be provided to Fiscal Representatives to assist in resolving existing problem invoices and avoiding untimely delays in processing future invoices.

At the end of this course, participants will be able to:

- Apply University policies and procedures inclusive of Fiscal Guiding Principles for procurement processing and vendor payment
- Monitor status of invoices at various stages of the procurement process and quickly recognize situations which may cause delays
- Resolve unsolved invoice issues

### 17. Management Skills for Supervisors

Supervising subordinates in the workplace is one of the greatest challenges facing managers. In this course managers will be presented with those skills necessary to effectively handle the myriad of situations that may be encountered as a supervisor.

At the end of this course, participants will be able to:

- Motivate employees and change the working environment
- Handle difficult employees and overcome their resistance to change
- Delegate assignments
- Coach employees for higher performance
- Analyze why employees under perform
- Raise credibility and visibility
- Master the keys to commanding respect

### 18. Microsoft Access

The Microsoft Access course will allow participants to gain technical skills and knowledge to utilize the tools and functions of Microsoft Access to
create and manage databases.
At the end of this course, participants will be able to:
- Design and create a database using Access
- Process data using Microsoft Access
- Import data from Excel into Access
- Manage tables, forms and reports using Microsoft Access

19. **Microsoft Excel**
The Microsoft Excel course is designed to introduce the process for creating professional spreadsheets and charts. Gain technical skills to perform numerous functions and formulas to enhance your presentation.
At the end of this course, participants will be able to:
- Create one or more spreadsheets in Microsoft Excel
- Generate and edit data in worksheets
- Format columns, rows and cells
- Create formulas using Microsoft Excel
- Use the formula feature in Excel

20. **Microsoft PowerPoint**
The Microsoft PowerPoint course is designed to introduce the basic features and tools of Microsoft PowerPoint. Gain technical skills to create an effective and creative PowerPoint presentation.
At the end of this course, participants will be able to:
- Use the formula feature in Excel
- Create a presentation
- Demonstrate animation in presentations
- Add pictures, sound and videos to presentations
- Design and change backgrounds

21. **Microsoft Word**
The Microsoft Word course is designed to introduce the word processing applications, functions and features and to gain technical skills to create, edit, save, and retrieve files.
At the end of this course, participants will be able to:
22. **Sarbanes Oxley Act of 2002**
Sarbanes-Oxley Act of 2002 (SOX) is a compliance required course for FAMU administrators, principal investigators, co-principal investigators and select departmental staff who work with University funding resources. This course will provide employees with the compliance requirements outlined in SOX to manage and maintain financial records. At the end of this course, participants will be able to:
- Access and apply the Sarbanes-Oxley Act (SOX) of 2002
- Interpret and apply the Whistleblower Protection Section 806
- Access, interpret and implement SOX Section 302 – Corporate responsibility for financial reports
- Access, interpret and implement SOX Section 404 – Assessment of internal controls
- Access, interpret and implement SOX Section 906a – Certification of periodic financial reports
- Identify and apply “Guiding Principles for Fiscal Affairs”

23. **Sexual Harassment**
Sexual harassment continues to be a sensitive but critical topic in the workplace. This lesson is designed to provide learners a greater understanding of Federal, State, and University policies on sexual harassment, and to facilitate frank discussions on the differing degrees of behaviors that constitute sexual harassment. Learners will then analyze the impact of the varying degrees of sexual harassment on the victim, unit and mission. Special emphasis will be placed on the process for resolving incidents believed to be sexual harassment and the roles of the supervisor regarding this topic.
At the end of this course, participants will be able to:
- Define the elements of sexual harassment
- Describe behaviors that constitute sexual harassment
- Analyze the effects of sexual harassment
| 24. | **Strategic Planning**  
The Strategic Planning course provides an introduction to the principles and practices of strategic planning. Conducted interactively, it leads participants in the step-by-step creation of a strategic plan. Designed to provide a framework for planning, the course is valuable to both those involved in developing strategy and those called upon to deploy strategy in action. The principles presented are applicable at a variety of levels in the organization.  
At the end of this course, participants will be able to:  
- Incorporate strategies in the workplace as reflecting environment, service requirements, and effective alignment with “Guiding Principles for Fiscal Affairs”  
- Value the contributions of strategic planning in structuring their own work  
- Respond with greater confidence to strategic initiatives  
- Interpret the principles of effective strategic thinking and planning  
- Interpret strategic lifecycles in organizations  
- Demonstrate the steps in building, communicating and evaluating results of a strategic plan  
- Apply knowledge on the relationships of strategic and action planning to their own workplace  
- Participate in strategic and action planning processes, employing recognized tools and techniques  
- Incorporate and apply “Guiding Principles for Fiscal Affairs” to strategic development |

| 25. | **Stress Management**  
Stress management will cover work related stress and the impact it has on job performance and health. It will teach working professionals how to better manage and minimize the impact of stress. The course will also help participants understand how to identify and minimize the negative
physiological, emotional and behavioral impact of stress. At the end of this course, participants will be able to:

- Recognize stress and the effects that stress can have on health and job performance
- Apply effective methods of coping with workplace overload
- Comprehend powerful mental rehearsal techniques, such as meditation to be useful for relaxing when under pressure
- Recognize simple techniques for managing unreasonable demands, as well as important tools that help to manage relationships with managers, supervisors, and co-workers

26. **Student Administration Business Processes**

Student Administration is a comprehensive suite of software specifically designed for the changing needs of higher education institutions. In order to help higher education institutions effectively meet and adapt to the changing needs and expectations of all their constituents, Oracle works closely with a wide variety of types and sizes of colleges and universities, standards bodies, higher education associations, and education industry leaders to develop and deliver the most responsive and comprehensive student administration and alumni development systems available today.

At the end of this course, participants will be able to:

- Financial Aid
- Student Financials
- Student Records
- Grade book

27. **Telephone Etiquette Skills**

In this course participants will gain fundamental skills and techniques for using the telephone effectively on the job. It spotlights the importance of the telephone as a business tool and provides practical tips and techniques for its effective use.

At the end of this course, participants will be able to:

- Apply superior telephone etiquette skills which are critical to the success of the organization
- Recognize the value of communication and how it affects the image of the organization
- Recognize effective verbal communication skills in order to facilitate excellent customer service
- Enhance the ability to communicate more effectively on the telephone
- Manage challenging calls with professionalism and confidence, using proven

### 28. Travel and Expenses Business Processes

The Travel and Expense course will focus on the procedures for handling business related travel arrangements, and monitoring and maintaining accounts and funds for travel expense.

At the end of this course, participants will be able to:

- Process Travel Authorizations, Cash Advances, Expense Reports and other travel related documents
- Monitor and maintain travel business processes according to University policies and procedures and Guiding Principles for Fiscal Affairs to ensure that appropriate documents are processed and approved prior to the traveler’s departure
- Process travel reimbursement within the prescribed time allotted immediately upon completion of travel
- Approve Travel Authorizations, Cash Advances, Expense Reports and Reimbursements

### 29. Understanding Financial Statements

Financial statements are necessary sources of information about organizations for a wide variety of users. Those who use financial statement information include company management teams, investors, creditors, governmental oversight agencies and the Internal Revenue Service. Users of financial statement information do not necessarily need to know everything about accounting to use the information in basic statements. However, to effectively use financial statement information, it is helpful to know a few simple concepts and to be familiar with some of the fundamental characteristics of basic financial statements.

At the end of this course, participants will be able to:
| Identify and apply the accounting equation |
| Know the implications of double entry accounting |
| Distinguish between debits and credits |
| Obtain knowledge skill-sets to recognize what a balance sheet illustrates about an organization |
| Identify components of how an income statement is put together |
1. Incoming Call inquiring about the DFA Training Program – Route call to appropriate Learning and Development Advisor

2. Fiscal Affairs Learning and Development Advisor:
   a. Provide overview of DFA Training Program
      i. Ask if individual is a Fiscal Affairs staff member
      ii. Provide an overview of the program
      iii. Inform employee of the pre-registration process (approval of immediate supervisor, complete registration form and signed “Commitment of Agreement”)
      iv. Upon approval of immediate supervisor, ensure that all signed documents have been received and certified; participants will be assigned a training track (schedule)
   b. Route Pre-Registration Form to Sherye A. Earst and Bridget Roberts. Keep a copy for your file.
      Pre-Registration Form must include the following information:
      i. Employee First and Last Name
      ii. Job Title
      iii. Department
      iv. Phone
      v. Email
      vi. USPS or A&P Employee
      vii. Supervisor

3. Participants will be added to Pre-Registration Database

4. Advisor must follow-up daily on approval process
   a. Notify immediate supervisor for approval
   b. Schedule an appointment with participant to assign training track
   c. At this time, participant must bring with them the
      i. Approved Registration Form
      ii. “Commitment of Agreement” signed by employee
   d. Give New Certification Program Packet
e. Add employee and supervisor to distribution list (for future e-mails). You need two (2) distribution lists, as follows: Certificate Program and Participants

5. Send “Friendly Reminders” e-Mail notification to Employee and Supervisor 24 hours prior to class. (Cc: Gloria Taylor on All emails.)

6. At the end of each class, verify and log attendance. If employee did not attend follow-up with a phone call and email, if not successful, contact supervisor to determine cause for missing class.

7. If employee is having difficulties attending class, successful completion of assessments or completing related tasks, schedule an advisement meeting.

8. Monthly training Progress must be reported.
FLORIDA AGRICULTURAL AND MECHANICAL UNIVERSITY
Human Resources Organizational Development and Training
Division of Fiscal Affairs Training Program

Commitment of Agreement

I, _____________________________________________ , request participation in the
Division of Fiscal Affairs (DFA) Training Program beginning February 28, 2007. I have
reviewed and understand the requirements for program participation and I submit the
following:

• I am currently employed within the Division of Fiscal Affairs as:
  (a) ___ an Administrative and Professional (A&P) employee, or
  (b) ___ a University Support Personnel System (USPS) employee;
• I have obtained the written consent of my immediate supervisor to participate in the
  program; and
• I fully commit to completing all of the required coursework and assignments, and I agree
to comply with all program specifications during the allotted time-frames.

I understand that this innovative program offers a unique opportunity for professional
growth and development for Division of Fiscal Affairs employees and I fully embrace the
program concepts and objectives. I further understand the importance of completing all Core
Curriculum courses and selected Information Technology and Workplace Environment
courses. My signature below pledges my total support and commitment to successfully
completing all the requirements of the DFA Training Program.

Employee’s Signature: _____________________________________________
Date: __________________________________________________________________
# Division of Fiscal Affairs Training Program Registration Form

## Section I: Employee Information

<table>
<thead>
<tr>
<th>Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Title:</td>
</tr>
<tr>
<td>Department:</td>
</tr>
<tr>
<td>Division:</td>
</tr>
<tr>
<td>Campus Address:</td>
</tr>
<tr>
<td>Campus e-Mail:</td>
</tr>
</tbody>
</table>

_I Understand the terms and conditions of participation in the Division of Fiscal Affairs Training Program._

Employee’s Signature: __________________________ Date: __________

## Section II: Supervisor’s Information

<table>
<thead>
<tr>
<th>Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Title:</td>
</tr>
<tr>
<td>Department:</td>
</tr>
<tr>
<td>Division:</td>
</tr>
<tr>
<td>Campus Address:</td>
</tr>
<tr>
<td>Campus Phone:</td>
</tr>
<tr>
<td>Campus e-Mail:</td>
</tr>
</tbody>
</table>

_I am the immediate supervisor of the employee indicated above. I authorize full participation in the Division of Fiscal Affairs Training Program._

Supervisor’s Signature: __________________________ Date: __________

## Section III: Division of Fiscal Affairs Approval Signatures

<table>
<thead>
<tr>
<th>Director, Organizational Development &amp; Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vice President, Division of Fiscal Affairs</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
</tr>
</tbody>
</table>

Organizational Development & Training, Perry-Paige Bldg., Suite 105 N. Tallahassee, Florida 32307
850-412-5150/Phone 850-412-7320/Fax

© 2007 Created by Florida A&M University Organizational Development and Training
## Division of Fiscal Affairs Training Program Advisement Form

<table>
<thead>
<tr>
<th>Name:</th>
<th>Supervisor:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department:</td>
<td>Title:</td>
</tr>
<tr>
<td>Title:</td>
<td>email/phone:</td>
</tr>
<tr>
<td>email/phone:</td>
<td>Advisor:</td>
</tr>
</tbody>
</table>

### Core Curriculum Courses

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Date Attended</th>
<th>Assessment Score</th>
<th>Initial</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Basic Accounting</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Best Practices in Accounts Payables</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Budgeting &amp; Commitment Control</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Charts of Accounts</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Documenting Fiscal Policies and Procedures</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Document Retention</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Ethics/Conflict of Interest</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Purchasing Business Processes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Fiscal Reporting</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. General Ledger</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Invoice Resolution Workshop</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. Managing Financial Expenditures</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. Risk Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. Strategic Planning</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. Travel and Expenses Business Processes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17. Understanding Financial Statements</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Information Technology Curriculum Courses

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Date Attended</th>
<th>Assessment Score</th>
<th>Initial</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Financial Management Business Processes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Student Administration Business Processes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Human Resources Business Processes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Microsoft Access</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Microsoft Excel</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Microsoft PowerPoint</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Microsoft Word</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Workplace Environment Curriculum Courses

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Date Attended</th>
<th>Assessment Score</th>
<th>Initial</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Change Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Communication Skills</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Customer Service Skills</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Telephone Etiquette Skills</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Management Skills for Supervisors</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Sexual Harassment/Protective Class</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Stress Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Signature</td>
<td>Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------------------</td>
<td>------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gloria Taylor, Director</td>
<td>Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organizational Development &amp; Training (ODT)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Advisor Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vice President</td>
<td>Date</td>
</tr>
<tr>
<td>Division of Fiscal Affairs</td>
<td></td>
</tr>
</tbody>
</table>