

BUSINESS CENTER

2023 IN REVIEW

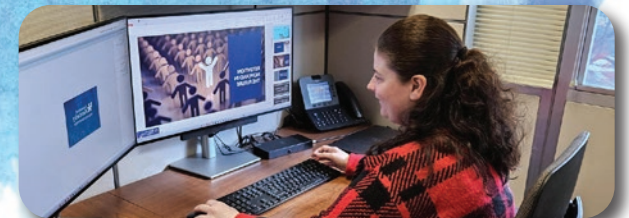


We are very pleased to present our first-ever Business Center Year in Review summary. As you will see on the following pages, calendar year 2023 was a year of change and transition for our office. We welcomed several new staff members, added training opportunities, and tweaked a few processes along the way. I hope this summary tells you more of our story, not just in statistics and lists but in a personal way as well, illustrating how we are continually working with you to achieve our shared goals of customer service and compliance. We look forward to more success and growth in 2024, meeting our challenges and improving our results. Many thanks to the creative team of business center members who worked diligently to design, compile, and bring this document to life: Adam Pickerill (committee chair), Cristin Costello, Le Anne Herzog, Maggie Maynard, and Lindsay Poore!



Susan Campbell

Associate Dean/Finance



2023 by the numbers...

Human Resources

- More than 60,000 M-G CAFE specific jobs views
- More than 300 Lunch and Learn/Showcase attendees
- More than 70 Exit Surveys completed
- More than 1200 Performance Evaluations completed
- More than 3000 Personnel Actions completed

Business Operations

- More than \$99 Million in fed & state funding managed
- Nearly 400 master data updates
- More than 360 Budget transfers
- More than 160 Business Procedure Exception requests
- More than 70 Procard applications processed

Extension Business Operations

- More than 1000 Concur Expense Reports approved
- 90% Increase in Budget Amendments processed
- Year-end actuals processed for all 120 counties
- Nearly \$4M in Innovation and Engagement Funds tracked

...and new friends



This year saw many new additions to the business center teams. The HR Team added three new employees, Sarah Habel, Adam Pickerill and Kayla Mincks (top row).



The Business Operations group added two new employees, Christie Henson and Mary Hammons (middle row). With these additions, the Business Operations group is able to be fully staffed for the first time in two years. The Extension Business Operations group welcomed Melissa Feddes to their group (bottom row).



Welcome Everyone!



Despite a whirlwind 2023, the college HR team bolstered successful programs like Open Houses, the Mentor Program, Lunch and Learns, and the Staff Professional Development Fund, while launching new initiatives including the Six Points of Contact onboarding process and the first-ever Employee Resource Festival. Our team welcomed three new members and 13 department HR administrators. Looking ahead to 2024, we're excited to amplify our efforts, fostering staff appreciation, professional development, and recruitment. We are proud to serve a college that prioritizes its employees. - Le Anne Herzog

HUMAN RESOURCES

2023

Onboarding

This year we implemented an on-boarding strategy we named "Six Points of Contact" ensuring new employees get an invite to our Orientation course, 3 touch point emails including on-boarding surveys during their first 75 days, an invitation to join the mentor program and an end of orientation email to their supervisor.



Ensuring Coverage

In response to a need to cover department business office vacancies, the Business Center created the Business Function Overload Pool. Each year the program has grown and this year we had a record number of uses at 23.

"The Business Function Overload Pool has been a godsend for us"

- Department Chair

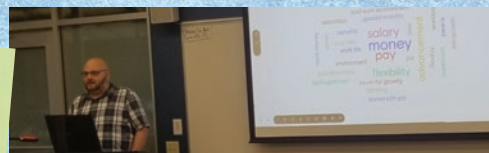
Lunch & Learn: FML Summary for Supervisors

This is a video recording of the Lunch & Learn: FML Summary for Supervisors presentation from 5-24-2023
Click here to return to the Lunch & Learn main page



Benefits of being a Mentee

- Obtain personal and professional development opportunities
- Practice professional and interpersonal skills
- Cultivate healthy relationships that last beyond the pairing
- Improve morale
- Obtain a feeling of accomplishment



Training and Professional Development

We once again provided a comprehensive training and professional development program for both new and existing HR Administrators. We conducted a three-part HR Huddle training series, introduced one-on-one Check-In Calls, and launched the Employee Showcase series as well as continuing the ever popular Lunch and Learn series. We also were able to honor specific requests, such as when we offered an on demand Payroll Review & Personnel Action training in November.

"It was really a nice event! Efficient, fun, and very informative!"



Resources

The Martin-Gatton College of Agriculture, Food and Environment is committed to providing employees with the resources they need to be successful in their role. The Mentor Program and Staff Professional Development fund both continued to thrive this year, with the development fund really picking up steam once post pandemic travel restrictions were lifted.

"The college has shown that it believes in its staff. It is great to have this available!"

Recruitment

We were busy assisting with your recruitment needs throughout the year. The traffic on the college Job Page continues to grow, with average of 5000 views per month, and we had the opportunity to speak with hundreds of potential candidates at job fairs. In addition we also kept up a steady stream of various Linked In networks (over 390,000 total members) to promote your jobs!



New Training Website

2023 saw the creation of a new training page. We envision this as a "one stop shop" for all your training needs. See a catalog of the trainings we offer, past recordings, surveys and more

<https://cafebusinesscenter.ca.uky.edu/training>

HUMAN RESOURCES

2023

Awards

This year the we assumed management of the Dr. Lisa P. Collins Outstanding Staff Award program and there were a record number of nominations. This added to our award responsibilities which include the Service Awards and Mentor Appreciation Awards. We consider it a great honor to able to support the college by coordinating these very important awards that recognize our employees.

- 108 Outstanding Staff Award nominees
- 267 Service Awards
- 4 Mentor Appreciation Awards



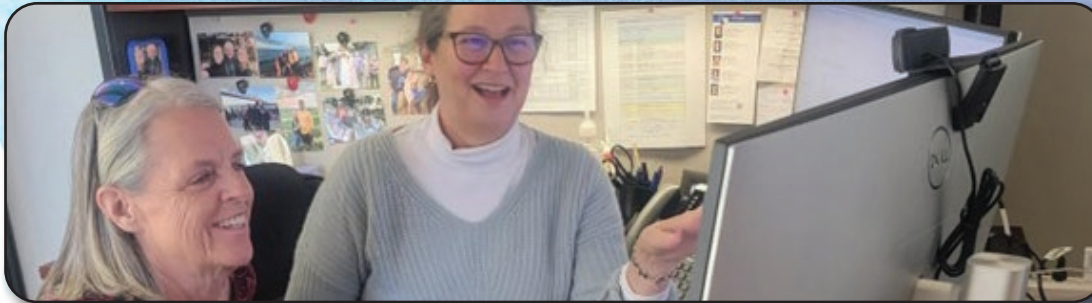
Goals for 2024

- Enhance Outstanding Staff Awards by increasing the monetary amount
- Streamline award processes
- Foster a "Sense of Belonging" for existing employees
- Increase representation and recruitment efforts at multiple job fairs



This year was marked as a year of change and new beginnings for the finance team. We celebrated changes in staff which brought new faces and experiences to our team and created new opportunities for success. With the addition of new staff on our team in 2023, we moved to a subject matter expertise model for our financial analysts.

This change allows us to focus more on customer service, training, staff development, and issue resolution as we work with departments and units. We hosted multiple trainings throughout the year, including state and federal fiscal year-end trainings, subject matter expertise trainings, open labs, and participated in the quarterly User Group meetings. We look forward to 2024 and strive to build on our training opportunities, staff development, and customer service as we proudly serve the college. - Jason Hardin



Budget Management

Our team manages over \$19 million in federal capacity funds and almost \$80 million in state funds yearly. 2023 was the first year our team entered unit budgets using the university's new software, Axiom. This year, we processed 360 budget transfers between departments as well as for funds committed to departments by the Dean. Additionally, we made 394 master data updates, including creating new cost centers and changing or blocking existing ones, as well as creating new Federal Capacity Grant accounts.

Training

We provide hands-on, one-on-one, in-person, virtual and group training to new and seasoned departmental business staff. In 2023, we offered five trainings which had 125 attendees. Group training topics included the state and federal year-end processes, OSPA grant subject matter expertise, and the AD-419 process which is required

"Thanks so much! I don't know what I would have done without your help!"

- Administrative Services Assistant

for federal reporting. Additionally, we offer a quarterly users' group meeting in which we provide support and updates to departmental business staff on various topics involving university financial operations. We hold regular one-on-one trainings with departments as needed. Our analysts meet with their assigned departments on a monthly basis, or more frequently as requested.

"Thank you for your quick turnaround!"

- Department Business Officer

Compliance

We work with M-G CAFE departments to ensure compliance with college, university, state and federal regulations. We understand that each department is different, and work with chairs and business staff to ensure departmental needs are being met while also adhering to university policies. In 2023, we processed 163 Business Procedure Exception requests that allowed departments with special circumstances to obtain exceptions to typical policies. Additionally, we processed 70 procard applications, providing department faculty and staff with the ability to make necessary purchases. Our primary goal is to find solutions that fit the needs of our departments as well as university requirements.



Resource Development

Our team focuses on creating user-friendly materials, including quick reference guides and standard operating procedures, to support departments in understanding university systems, adhering to business procedures, and staying informed about various topics. In the past year, we crafted guides covering Tableau, SAP t-codes, grant management, Concur, and procurement. Additionally, our office produces a quarterly newsletter to share updates and valuable resources with department business staff. Currently, we are evaluating the needs of department business staff and planning to develop new guides addressing complex subjects like account reconciliation.

Reporting

We consistently generate and distribute reports to aid departments in monitoring budgets, procard and travel transactions, and grant statuses. Our monthly reports now cover areas such as Concur Travel and Expense Management, HR Clearing account balances, Federal Capacity Grant CAS items and expenses on parent grants, along with state and federal roll-ups. Following the transition to Tableau, we are collaborating with the university's IRADS team to tailor new reports to the specific needs of each department. Given our college's diverse funding sources, a varied reporting portfolio is crucial. These reports play a pivotal role in managing funding and ensuring that departments have the necessary information to run as smoothly as possible.

"Without that lifeline tied to my waist, I couldn't stay afloat..."

- Department Business Officer

Goals for 2024

- Refine analysts' subject matter expertise
- Finalize a comprehensive guide on account reconciliation
- Conduct a detailed training on state match cost centers
- Develop more reports to deliver on a recurring basis



The Extension Business Operations (EBO) team plays a crucial role in facilitating and enhancing the efficiency of business operations within the Cooperative Extension Service (CES). This talented team's commitment to providing comprehensive service and business support to all 120 county offices underscores the importance of smooth and effective administrative processes.

By championing good stewardship, financial best practices, and compliance, the EBO not only upholds the values of the CES but also contributes to its long-term sustainability. The team's dedication to these principles ensures the organization remains a reliable and responsible resource, ultimately fulfilling its mission of serving communities and fostering a culture of transparency and accountability.

- *Becky Amsler*

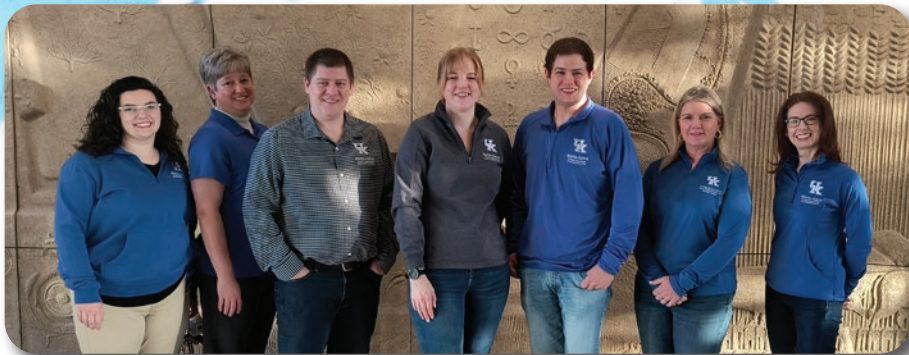


New Partnerships

We furthered our 2023 goal of initiating new partnerships and strengthening existing relationships. EBO hosted the Department of Revenue in November and participated in meetings with the Kentucky Department of Libraries and Archives, the UK Treasurer, and UK Finance and Administration Specialized Training staff. We were also represented at professional development opportunities and conferences held in San Antonio, New Orleans, Nashville, Frankfort, and Bowling Green.

Teambuilding

We successfully completed the MG Coaching & Consulting Leadership Development Series. The series consisted of four in-person sessions, during which we participated in group exercises aimed at fostering a dynamic workplace culture, improving internal and external communication, and collaborating to best utilize individual strengths.



Website Updates

A comprehensive redesign of the EBO website was completed in order to supplement trainings offered by the team and to deliver a centralized location for Quick



Reference Guides, recorded presentations, required EBO forms, and FAQs for the recently implemented Sales and Use Tax on UK Extension services.

cafebusinesscenter.ca.uky.edu/extension-business-operations

Budget Updates

The FY24 County Budget file was re-imagined with substantial updates to the 10-Year Capital Plan, Schedule of Disbursements, and Amendment sections. The FY24 Budget Manual, which is a companion piece to the County Budget file, was also revamped to annotate these updates and to serve as a valuable tool for everyone who accesses the Budget file.

"Thanks so much for going above and beyond!"

-County Fiscal Contact



Outreach

The EBO Administrative Assistant became an integral point of contact to assist the Emergency Management Assistant Director with impacts to county inventory following the tornado in the West Region and flooding in the East Region, in addition to strengthening our communication with Regional offices via a weekly email update.



Training

This year, we offered a wide range of in-person and virtual fiscal trainings to Regional Extension Directors, Area Extension Directors, and county staff which included interactive presentations on the following topics:

- Purchasing and Disbursements
- Fiscal Year-end
- Travel Reimbursement
- QuickBooks
- Establishing Tax Rates
- Cash Handling
- Budget Processes

"Thanks so much for coming down...It was a really good training and everyone learned a lot. I will definitely send some dates where we can do it again for all of my counties."

-Area Extension Director

Goals for 2024

- Develop an online training evaluation system
- Lead trainings at 4-H Volunteer forum
- Systematize county support provided at year-end