FY16 DF Communication Survey Results

July 2016
Survey Overview

• Survey conducted over 2 weeks in early May 2016
• Survey invitation sent to BFAN (174 people) and CATSkill (162 people) listservs
• Survey link included in May edition of Finance Matters newsletter (included in UVM Announcements & Events)
• Encouraged people to forward link to other staff with business/financial role
• 133 responses: 98 complete, 35 incomplete
Respondents By Unit Type
(N=133)

- Academic: 55%
- Administrative: 26%
- Division of Finance: 20%
BFAN (BUDGET & FINANCE NETWORK) MEETINGS
Did you attend a BFAN meeting this academic/fiscal year? (N=133)
Reasons for Not Attending a BFAN Meeting in FY16
(N=37)

- I'm on the listserv only to receive BFAN emails; I never attend meetings: 20%
- I get information in other ways: 19%
- Not invited/not aware: 15%
- Not enough time in my day: 15%
- Others in office/ABSC attend: 7%
- No topics of interest: 5%
- Meetings were at inconvenient times: 4%
- Audience/allowed attendees unclear: 4%
- New to this role or UVM: 3%
- Not related to my work: 3%
- Off-campus: 2%
- What's BFAN?: 2%
- Meetings are too long: 0%
What do you think of the current BFAN schedule? (N=102)

- Just right: 86%
- Not enough meetings: 6%
- Too many meetings: 8%
How would you rate the overall content of the meeting(s) you attended? (N=59)
What Respondents Found Most Valuable About BFAN Meetings

- Policy & procedure updates and changes
- Budget information
- Updates about UVM finances and strategic initiatives
- Important dates and deadlines
- Hearing directly from DF leaders and managers
- Networking
- Quick/efficient meetings
What Respondents Found Least Valuable/
Suggestions for Improvements to BFAN Meetings

• Some topics not relevant to all
• DF staffing updates not of interest
• Speakers don’t introduce themselves, talk too quickly, can’t be heard
• Go more in-depth on topics
• Provide more advance notice of meetings
• Clarify what “BFAN” is and who is “invited” to attend
IMPORTANCE OF OTHER DF COMMUNICATION/ INFORMATION SOURCES, AND SATISFACTION WITH THOSE SOURCES
Respondents from Academic Units

% Respondents Rating these DF Information Source as "Important"

- Email updates via BFAN and/or CATskill listservs
- PeopleSoft mini-manuals
- Calling or emailing a DF office (ABSC, FAB, UFS/Controller, OOE) directly
- Individual meetings/conversations with Finance leadership or management
- Finance-related classes offered through PD&T
- DF websites
- Finance Matters newsletter
- BFAN meetings
- 1:1 help sessions offered through PD&T

% Respondents "Satisfied" with each DF Information Source
Respondents from Administrative Units

% Respondents Rating these DF Information Source as "Important"

- Calling or emailing a DF office (ABSC, FAB, UFS/COOEOE) directly
- Email updates via BFAN and/or CATskill listservs
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% Respondents "Satisfied" with each DF Information Source
What’s Working Well re DF Communications

• Finance Matters
  – “I appreciate the Finance Matters newsletter and transparency. I feel like it allows me to read up on what's going on in case there's information that is not being passed down to me from my Dean's office admin.”
  – “I like the new DF newsletter. Keep it up! I use it at our leadership team meetings because I can't remember for crap and this helps put it all in one place.”
  – “The Finance Matters newsletter is helpful. It gathers information in one place, but should not be a replacement for regular email updates.”
  – “I really like Finance Matters and think it has been a great addition to the DF communications strategy.”

• General Comments
  – “DF communicates very well.”
  – “I think you're doing a good job.”
  – “I think that DFAN [sic] does a pretty outstanding job of keeping us all informed.”
  – “Thank you for your division's work and your efforts at transparent and timely communication.”
  – “I appreciate you taking the time to look into this. I've been in the DF for a long time and can only say that communication has improved greatly since I started!”
What Needs Improvement re DF Communications

• Websites
  – Add a glossary of financial jargon
  – “Mish-mash of websites” is confusing to navigate; makes it hard to find information

• General Comments
  – Be more to the point
  – Attending meetings on campus is difficult/impossible for off-campus employees
  – Consider use of SharePoint as a tool to distribute content
IMPORTANCE OF FINANCE-RELATED TOPICS, AND SATISFACTION WITH THE INFORMATION RECEIVED ABOUT THOSE TOPICS
Respondents from Academic Units

% Respondents Saying this Topic was “Important”

- Policy/procedure/process changes
- PurCard
- Financial systems, how to access and use...
- Financial reporting
- Purchasing
- UVM’s financial management system
- Incentive-based budgeting (IBB)
- Financial training opportunities
- Travel & expense
- Payroll
- Financial regulatory/compliance environment
- Budget guidance and process
- Accounts payable
- F&A rates
- Effort reporting
- Internal controls
- Chart of accounts
- Income/expense activities
- Space inventory
- Movable equipment and asset control
- Tax issues
- Non-sponsored AR and billing
- DF staffing updates
- Petty cash
- Capital projects financing

% Respondents “Satisfied” with the Information they Received on this Topic
Respondents from Administrative Units

% Respondents Saying this Topic Is “Important”

- Policy/procedure/process changes
- UVM’s financial management system
- Financial reporting
- Financial regulatory/compliance environment
- PURCard
- Financial systems, how to access and use
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What Needs Improvement re Info About Finance Topics

• Policy/procedure/process changes
  – Be more collaborative – get input from end-users
  – Provide more advance notice of planned changes
  – Don’t rely just on the BFAN meeting to relay information
  – Consider impacts on administrative units, not just academic units.

• Training
  – Provide a clear schedule of individual help sessions
  – Provide more specific training about UVM financial systems, e.g., the general usage of PeopleSoft
  – Offer more training for people who are working towards business manager status
  – ABSC customers could provide information to ABSC more efficiently if they were more familiar with PeopleSoft transactions and financial policies
  – Offer PeopleSoft trainings for specific areas
What Needs Improvement re Info About Finance Topics

• IBB
  – Provide more information and detail about how year 1 of IBB has gone: outcomes, concerns, unintended consequences, how the campus has transitioned and is responding

• Budgeting
  – Communication about F&A and Benefit Rates should be coordinated with SPA to ensure consistent messaging and timing
  – College-level budget process too short
  – Sometimes the release of critical information is delayed (through no fault of DF), leaving very little time to react (e.g., salary increases for FY16). Timely delivery of information is important in order to operationalize decisions effectively.