

Summary of COE-Staff Retreat

1) Link to staff retreat power point

http://www.coe.uga.edu/adfaculty/business/training/Staff_retreat_2007.pdf

2) Feedback Survey from Staff 27 responded (61%) (from 1=strongly disagree to 5=strongly agree)

Average Overall Scores

1. Did you like the location? **4.8**
2. Did you like the food? **4.4**
3. Was the content discussed meaningful and relevant? **4.9**
4. Was the experience good for building relationships? **4.9**
5. Do you believe we went away with some good suggestions to implement? **5.0**
6. Should we do it again? **5.0**
7. What is your overall rating of the retreat? **4.9**
8. What comments might you want to share?

List of All Comments

1) It was great to get together with the other office managers to find out what we have in common and what we don't have in common. It was also nice to know that overall we do the same kind of things for our departments. I enjoyed getting to know them a little better. I thought the overall attitude of the retreat was awesome!

2) think having Andy and Bobbie talk with accountants before the meeting made for a better meeting. They had most of the issues on hand and we didn't have to waste time letting them know our concerns. They took all comments and condensed them very well to cover all of the different accountant's jobs and concerns with their individual accounts as well as those that are consistent accounts across the college.

After the retreat I have reflected on my current role and some of the things I do, I believe I have a lot of room for improvement in the area of working with other people. I have done my job for so long by myself that I have always felt so different from other accountants. I now see that others have the same concerns and opinion as I do and it would benefit me to talk to others. Even though my sheets are a lot different from others I can get some input from them that may help me.

Having time to make it fun as well as business made the atmosphere a lot more relaxed than if it had just been all in a meeting atmosphere. This gave time for relaxing in between important issues.

3) I thought the retreat was very successful. It was more relevant to my job than the professional development sessions we attend. I was thinking that a "two-day" session might be a better way to spend our money.

4) I really enjoyed the retreat and getting to know different faces. It also made me feel a part in the work that I do. Although my title stands at Admin. Assoc. I do accounting too. It helped me understand what others also do. It gave us all a chance to relax and enjoy one another's company and to come together as one. I hope to be invited in the near future. I would love for someone to come and see what I do in SETWEB. Its not easy dealing with at least 400 online active students during registration the same time I do personnel's. I would also like to grow in accounting, because I really enjoy doing the work. Thank you Bill for allowing me to be a part.

5) I did not consider what a bonding experience this would be and I think if we accomplished nothing the entire day it would have still been worth the trip just to get to know each other. That in its self creates teamwork. But I don't think that was all we accomplished. The morning sessions were very helpful for brainstorming and sharing easier and more productive way to get out jobs done. And the afternoon session brought us all together to discuss teamwork and have a good time together. I think the day was a great success. Thank you to the ladies in the business office who were so instrumental in planning and making the day fun and productive.

6) Being able to interact (personally and work related) with peers in this sort of setting is very meaningful in building a positive relationship with those that we work with daily. I appreciate this opportunity.

7) The accounting group did not finish discussion of our agenda. We could have used the full hour. For accountants - need a follow-up meeting to discuss and/or decide to implement some of the internal spreadsheets and/or forms that were distributed yesterday and uniform the ones that would work for their departmental needs. Kinesiology is a different area, and theirs works for them. I probably have more suggestions, but need more time to think about it.

8) Even with the office managers group, Gabrielle did not have a lot in common with the academic side and I could only relate because I have worked in an academic department in the past, but it's different now working in the Center. We don't have the same working relationships like those in the departments with interaction on a daily basis with a large number of faculty and staff. I think having our new office manager's list serve will be a great help to us both.

9) This experience made me feel more like a valued member of a team, and I felt a lot of positive energy in the air. All the presenters were GREAT! If we want to all function as a whole, and less as a bunch of disassociated units who are often unaware of what the others are doing, it is really necessary for these types of retreats to be repeated. Thanks!

10) It was so good to get to know others around you. When we have the meeting, it's impossible to know names much less faces. This helped me to put a face with the department. I think anytime you can come together for a social or meeting away from the work force it's a good idea. That type of setting brings people together. I think we should do it more often even if it's a Christmas gathering where we all bring a dish. It was also nice to hear other people's thoughts and suggestions. It really helped me a lot. Thanks for doing this for us.

11) As I stated in the "wrap up" session yesterday the Retreat was worth every minute just to get to know the other Office Managers and to see that most of us are "on the same page" as far as duties, work loads, etc. It was a day well spent!

12) I think this was a very good experience for staff to get away from the office and spend quality time together. This helps build relationships and morale which in turn makes for a much more productive and happy workplace. All of the presentations were very good and meaningful. Ending with the teamwork presentation was appropriate. I appreciate the investment the administration has made which allows for this type of interaction. I believe it will pay off. Door prizes were exceptional. I think it is amazing I come away feeling so positive about the experience, since I was picked on all day.

13) It was a wonderful experience for me. I doubt any other College in UGA does this for the Staff. COE is wonderful place to work. I love everyone in business office and all are GOD send for me. It's hard for an immigrant to get such good working environment and I feel so lucky and honored to meet you all and be a part of this team.

The other accountants and office managers are equally good and I left with so many new ideas that I can implement in my work.

I really appreciate you all and all the efforts that all of you put in to get the job done.

If you have any problems with my performance, please let me know so that I can correct myself and avoid making mistakes in future.

Bill, I would also like to volunteer for Retreat next year. If any help is needed I would be glad to do whatever I can.

14) I thought it was a great way to get to know people in the other departments and learn different ways of doing things.

15) BILL: IT WAS GREEEAAAT!!!! This was an excellent opportunity to hear that others are having the same issues that I may face and those issues are

being discussed and heard by others on a higher level. (Kudos to Shirley Anderson)

16) Being the new kid on the block I not only learned a lot, but I made some very good contacts here in COE. I was very impressed with the collective knowledge of the group, the offers of help from everyone and the just plain welcoming, helpful and friendly attitudes. The chance to get to know one another away from the everyday pressures of our work place was great.
Thank you to everyone involved with making yesterday possible! And my son thanks the one that got the car wash so I could win it!

17) Thank you!

18) Maybe plan to have this meeting latter in the semester because it's a very busy time at the beginning of a fall semester. I found it very helpful to be able to talk with other Office Managers and learn not only about their departments, but the way they deal with things in their department. Salli and Mike were excellent!
To: Bill, June, Christy, Shirley, Freita, and others
I enjoyed every moment!

19) I enjoyed getting to know people in COE. It was a fun environment and great learning experience. I really enjoyed the retreat as well as my lovely basket (door prize) :-)

20) I've been at UGA for over 17 years and this is the first time I've been to a retreat. I think it is beneficial to meet with people who do the things that you are doing. I met a few people that I will be able to contact when there are questions on how to do my job. I would have had a hard time finding this information out any other way. I really enjoyed it and look forward to the next one. The Business Office did a great job setting this up and I really appreciate it.
Another thing I learned is to have a seat belt on while riding in a golf cart with Bill....

21) I thought it was a very positive retreat. I really enjoyed the afternoon sessions on Generations, SELF, and Teamwork video.

22) This was a GREAT event! It was very helpful and the networking with other accountants was a good idea since I am still kind of new to COE. Kudos to the Business Office for all their hard work and a job well done!!!!

23) I think that it was nice for staff to get away from the office and spend time together. I enjoyed the presentations and brought back some good ideas from other office managers. The door prizes were nice and I think that it was nice that everyone received one. I think that this will pay off in the long run.

24) Thanks for this Bill. Yesterday was great!!

25) A lot of planning and work went into this meeting and I appreciate that--better than last year. I think other staff should have the opportunity to participate too.

26) The retreat was a great staff morale booster. A lot of interaction among staff from different departments.

27) Loved the place and the food was outstanding. I thought it was a wonderful team building experience. You can't have a team without knowing and developing trust with your members. I learned a lot about my fellow COE staff members and got to meet several that were new. Being a large college we run the risk of getting caught up in our own environment so this is one way to help bring us together. I was excited by all the positive and good ideas that were generated and I'm looking forward to working with everyone to make them happen. We have a lot of talented staff!

28)

3) Office Managers Meeting Re-cap (led by Sally and Mike)

Mike Gorman will create an office manager listserv so we can communicate with each on any issues, questions or suggestion about our duties.

We are going to have a meeting once ever semester for brainstorming, trouble shooting and sharing ideas.

Office managers are going to create training manual for our job and duties we perform. The following is what we will begin creating for the manual.

Appointment packages: Christy, Mike, Sally

Course Scheduling: Mike, Suzanne

Faculty Searches: Christy, Sally

Visa: Kay, Suzanne

Inventory: Sally

We are also going to create a "call list" for key people we work with across campus and office managers who are knowledgeable in certain areas.

Thanks for this Bill. Yesterday was great!!

Sally

4) Notes and Comments from the video, Miracle of Flight 232 (led by Christy, June and Suzie)

Hi Bill,

Below are the notes from June, Suzanne and myself on the section on Teamwork. If we receive any green sheets back we will update you. Thanks for your work in bringing this about -- I think it was very beneficial.

Notes and Comments from the video, Miracle of Flight 232 and the discussion afterwards. Below are the comments solicited immediately following the video.

Only one major purpose was brought forth uniting all of us as part of the College of Education Team -- *To play a role in helping the COE be the best college of education in the country.*

Discussions and comments after the video centered around the five team factors involved in having an effective team mentality in our organization -- **Preparation, Luck, Cooperation, Communication and Execution.** What does the COE do currently to support teamwork? How can we strengthen and improve?

Preparation and Luck

- *Have access and funding for more Training and Development
- *Work on Cross Training within our departments and designate backups for everyone
- *Work on our communication skills and methods
- *Remain calm but be aggressive and do what it takes to get the job done
- *Don't procrastinate or spend your time and energy looking for someone to blame

Communication

- *Monday meetings for Office Managers and Accountants have been very helpful
- *Communication sent to DH's that effect staff does not always reach staff
- *Need a list of who to go to for answers
- *Staff needs to trust and familiarize themselves with each other to know where to find information/files/passwords in each other's offices if the need arises.

Cooperation and Execution

- *Need to encourage DH's to communicate more with their staff regarding the big picture -- staff need to buy in to COE goals but this is difficult if they aren't made to feel like a valued team member
- *Need to learn what each department does and the role they play in the college
- *Communicate to staff when vacancies occur and likewise let them know when new hires are made.
- *Need to have a list of who to call in the COE for various questions that might arise in their work

*Departments being located on different floors or buildings provide communication challenges -- suggestions needed that will make this less of a problem

Hopefully staff will fill out the green sheets given to them at the retreat and return them to June, Suzanne or Christy. After reviewing it is hoped that two or three items can be identified to work on between now and the next retreat. From the comments above the major themes that seems to come across all aspects of teamwork is the lack of information/communication and being familiar/cooperation with what staff in their departments do and with staff in other departments

Christy

5) Accountants and Business Office Meeting Re-Cap (led by June Andy, Bobbie and Bill)

- Next years retreat will be planned by staff in Kinesiology, Student Services,. GCA and CSD&SE with Bill and Shirley as a resource
- A cross training program to be put into place where department accountants can spend time with their counter-part in the Business Office to learn payroll, budget amendments etc and where Business Office staff could spend time in the department top gain a better understanding. To be worked out with parties involved.
- Professional Development for staff to be turned over to SRG to find out the needs, identify the training and make suggestions to Academic Council
- Need for review of accountants peer evaluation. Overwhelming majority not happy with it. Some department heads did not share results with them.
- Business Office shared how their filing system and office is set up the same so each member is familiar and can get things if needed when staff member is out.

The departmental account session began with everyone introducing themselves and describing the types of accounts and activities in their departments. Beyond just allowing ourselves to become more familiar with each other, this activity encouraged us to use each other as resources when faced with a new challenge and also helped emphasize that due to the differences in departmental activities our methods and procedures will also vary. Copies of forms and spreadsheets used by the various accountants, gathered during individual meetings prior to the retreat, were handed out as a resource, and several were discussed in detail. Though the group could have continued for a while longer discussing the challenges of the job, several items were discussed and highlighted as issues to be addressed:

- In numerous cases the accountants emphasized the importance of communication with department heads and directors. Lack of communication leads to missed deadlines and last minute scrambling. Several

people highlighted the benefits of weekly meetings with their department heads. (This conversation spanned several topics)

-In some cases, information that dept. accountants need to act upon is only directed to the department head. In cases where financial information is forwarded from the business office, please cc: the accountants too.

-Training on inservice accounts is needed (budgeting, year-round activities, and spreadsheets).

-It was decided that on a case by case basis departmental accountants can request to do their own budget amendments and posting to grant spreadsheets. This will allow us to know our accounts better.

-We will try to get together a useful travel regulation cheat sheet for students. Students more frequently do not follow the regulations, creating much more work when processing the reimbursement. (I will have to convince a few people to help compile or review this)