

A Conversation with Lyn Kelly, Associate Vice President for Finance and Administration

Facilitated by Luke Auburn

Luke Auburn: You're listening to the RIT Professional Development Podcast Series. I'm your host, Luke Auburn. Our guest today is Lyn Kelly, Associate Vice President for Finance Administration, Controller and Assistant Treasurer. Lyn leads the controller's division of approximately 95 staff of responsibility for financial reporting, accounting, procurement, payroll, and accounts payable, student financial services, and sponsored programs accounting. Our conversation will focus on her approach to creating an environment that supports professional development and allows her staff to grow in their careers.

How do you approach professional development with your staff? Do you have a formal process in place or do you take a more organic approach?

Lyn Kelly: We have a very formal process in place. We have a training requirement annually. All exempt staff must participate in 40 hours of professional development. We're fairly flexible about the type of training and professional development. But they have to track their hours and we, it is included in their performance appraisal. And for nonexempt employees, they have the same requirement to attend, but we reduce the number to 30 hours. And we very strongly encourage people to participate in training and we charge all of our managers with ensuring that their employees are attending the correct type of training.

Luke Auburn: What professional development programs have you created specifically for your staff?

Lyn Kelly: We've created two workshop series that are for the broader RIT community that we require our staff to attend. And one is the accounting series and one is the sponsored programs accounting. There's a series of workshops which end up with a certificate. But to supplement that, we've created a Brown Bag lunch series. We have an average 60 people a month attend

the Brown Bags. They range in topics from how to read our financial statements and understand what they mean. To how to perform account reconciliations. And we encourage as many people as possible. Open registration. They can attend, they can pick up training hours through that.

We've added in some additional technical training that we call our technical users group which meets once a month to do a deeper dive into a specific technical issue. Such as creating macros or V-lookups in Excel. We have a book club where we read a business book, and we invite people to participate. They can count the discussion as part of their professional development. We also do hands on training and small group training on very specific topics where we believe there's a need.

Luke Auburn: Excellent. And along the same lines, what outside resources do you encourage your staff to take advantage of?

Lyn Kelly: I think we're really fortunate with the advent of online training. There's numerous webinars that give technical skills. Of course, we take advantage of CPD classes which make up a lot of the training. But we also require technical training, so we belong to several professional organizations. We look at webinars, we gather as many people as we can in a room if there's a topic of interest. It's very low cost, but a very effective form of training. We attend workshops with other colleges and universities where we bring in speakers. Those happen twice a year, I encourage as many people on our staff to attend as possible. Sometimes we have between 50 and 60 people go to these workshops. And it also gets them out of the office and the opportunity to mingle with peers from other institutions. And then we do very targeted, specific workshops where we send people away for cash management training, debt management, other types of topics that are specifically related to what we do in the controller's office.

Luke Auburn: In your opinion, what are the essential competencies that one needs in order to be successful in your area?

Lyn Kelly: We're constantly looking for people who are very effective communicators. If I'm looking for an accountant and they have an accounting degree and often a CPA is required and sometimes an MBA is required. It depends on the level of work. I assume that they have the basic competencies to do the job. But what I'm working for all the people who exhibit natural curiosity. That means they can analyze data. They can put into words whether or not the fluctuations from period to period are reasonable. Do they make sense? And then they can communicate the information to nonfinancial people in a way that makes it easy to understand. And I'm also looking for people who take a broader view. I want them to look beyond RIT. I want them to understand the higher ed industry. I want them to be able to think about trends that may be impacting us. And in order to do that, you have to be well read and really keep up with what's happening in higher education.

Luke Auburn: And, finally, what skills do you see becoming increasingly important as the field changes?

Lyn Kelly: I think the skills that we described. Very high level technical skills, the ability to, you know, you've just got to be an expert in Excel and you have to be able to be a good communicator. And probably more and more using social media in certain areas that we work in because that's how people are communicating. So that's an emerging field for us as accountants.

Luke Auburn: Lyn, thank you very much for your time. This concludes this edition of the RIT Professional Development Podcast Series. For more information on how you can develop your career, please visit rit.edu/cpd.