GEORGIA
FISCAL MANAGEMENT COUNCIL

Successfully Leading
Our Finance Teams During the Pandemic

Lee Wright, Chief Financial Officer

By Lee Wright, Georgia Department of Public Health

Let's face it: the COVID-19 virus has altered the traditional workplace environment during the course of this year in ways never imagined, and many of these changes will become permanent after the pandemic has subsided. The coronavirus has produced both challenges and opportunities for all finance managers, and it has forced us all to adapt and adjust in order to perform daily activities and achieve our operational goals. As we continue to manage and maneuver through these unparalleled times, here are some considerations for successfully leading our teams during and after the pandemic.

First, ***adapt and reinvent*** processes for working and managing in the remote and virtual world. Critical finance and accounting functions, as well as year-end audits and quarterly reviews, are now done virtually — a challenge for all staff who are not physically on-site with agency partners and teams; however, with the right technology, tools and skills, state government agencies should be able to navigate this transition to remote work smoothly and successfully. Modified and streamlined processing and workflows coming out of this new environment can be a benefit that might otherwise have not been achieved. For example, with less employees in the office and modified work schedules, duplicative and redundant processes are likely to be identified and marked for elimination. Finance leaders will be forced into figuring out how to get the work done in the new world, and will be forced to think "outside the box" – not always an easy task for the analytic and right-sided brain budget and finance professionals that we are! Take advantage of all technological tools and innovative ideas that are available to us.

Secondly, ***communicate, communicate, communicate***! Virtual and remote working makes effective and frequent communication with your bosses, teams, and staff even more important now than before the pandemic. Employees might feel as though their managers are less aware of the work they are doing remotely. So, it's important to reach out via a phone call, Teams, or Zoom, instead of sending just an email.

Frequent and regularly scheduled Teams or Zoom meetings connect us and allow the important transfer of information and review of specific work documents. Staying connected ensures us all that everyone is accessible and reassures the team members that their contributions are important and recognized even while working in the virtual and remote workplace.

Also, _**ensure that internal controls remain intact**_. One of the most common and important controls involves the approval of expenditures on a regular basis. So, make sure important internal control processes are maintained and adjusted as needed with a virtual workforce. Leverage technology to move toward virtual processes, both internally and externally. Review your manual processes and controls and establish a process to use digital tools to execute those tasks when possible. Confirm that your team has remote access to key systems and data. In addition, processes that require adequate segregation of duties in a traditional work environment need to continue to do so while working remotely or operating with fewer on-site staff. In most situations, a little creativity and involvement by key personnel might be all that is needed to help get over segregation of duties or other control hurdles (or at least lower risk to an acceptable level).

Finally, _**make staff well-being a priority and foster a sense of belonging**_ during these extraordinary times. Hopefully, by going virtual back in the spring, most teams have found their groove by now and have figured out the path to a smooth life/work balance. Regularly checking in with your team members is key since you're not seeing them every day around the office. You want to make a point of reaching out, and you may also have to get better at sensing when someone could use a bit of extra support. Everyone wants to feel they are not ignored, respected, treated fairly, included within the group, and contributing to the common goals of the agency. Remote work can increase feelings of loneliness and isolation, and managers of virtual teams should make an effort to combat these feelings by fostering belonging and connection.

All in all, time will tell how the coronavirus pandemic will change the way we work in the long run. One thing seems certain: working remotely, at least part-time, is here to stay for many people even after COVID-19. There are pros and cons, of course, and also obstacles as workers adjust to a new style. The overarching principle that does not change is this: our job as fiscal leaders is to ensure our responsibilities remain visible and intact, our commitments held steadfast, and our goals met successfully. The citizens of Georgia are counting on us all to rise up to the challenge and do our part in navigating this great state smoothly through these turbulent waters.

Evaluation Planning

By Jennifer Inglett,
Karen DeMeester, Melinda Moore, and Theresa Wright

"An intelligent plan is the first step to success... Planning is the open road to your destination. If you don't know where you are going, how can you expect to get there?"

-Basil S. Walsh

Implementing a program or project evaluation seems daunting at first, but with a little planning, evaluating the work you do is achievable and practicable for meeting your goals. A good understanding of the steps to consider in the evaluation process will provide you with a roadmap to success.

Carl Vinson Institute of Government
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We promote excellence in government through education, assistance, research and policy analysis to help public officials serve citizens in Georgia and around the world.

There are four main steps to consider in planning a program evaluation:

1. Assessing program objectives and goals;

2. Identifying the focus of the evaluation and the questions you want answered;

3. Building your evaluation team;

4. Developing a timeline for your evaluation activities.

Step One: Assessing Program Objectives and Goals

The first step is by far the most important to achieving accurate and impactful evaluation outcomes. By assessing your program's objective and goals, you will be able to draw a direct link between the program's activities and the program's outcomes (i.e., what you hope to change as a result of your program). As evaluators, we often refer to this program assessment as the "Theory of Change." A theory of change explains how and why a program will reach its goals.

When coaching clients through this first step in the evaluation planning process, we ask them the following questions to determine the program's goals, how those goals will be achieved, and what outcomes will indicate when the goals have been achieved:

- ♦ What need does your program address?

- ♦ Who is doing what is needed (e.g., program staff) to take action in the program?

- ♦ What actions do they need to take?

- ♦ What activities are needed to meet intended outcomes?

- ♦ What is the relationship between activities and intended outcomes?

Step Two: Identifying the Focus of the Evaluation and Creating Evaluation Questions

Once you have developed a program description, the next step is to identify the focus of the evaluation and the evaluation questions that must be answered to know if the program has attained its goals. First, what will the focus of your evaluation be? Are you in the early stages of program implementation and want to understand how well (or not) the program is being run? This type of evaluation is referred to as a process or implementation evaluation. A process evaluation will tell you the types of services being delivered, who is receiving those services (e.g., clients), what resources were needed to deliver the services, and any barriers or problems to delivering the services. A few examples of process evaluation questions are:

- ♦ Is the program being implemented as intended?

- ♦ What resources were required to implement the program?

- ♦ What challenges threaten the program's progress towards attaining its goals?

In addition, you may want to know if your program is achieving its intended outcomes and goals, such as whether those who participate in a Master Gardener program then report an increased knowledge of native plants that thrive in Georgia. This is referred to as an **outcome evaluation**. Outcome evaluations assess your program's ability to produce change in a target population. A few examples of outcome evaluation questions are:

- ♦ Is the program producing the expected outcomes (i.e., achieving its goals)?

- ♦ What key factors are essential for achieving this success?

Step Three: Building your Evaluation Team

"No man is an island entire of himself…" and this is also true for the program evaluator. A comprehensive evaluation requires a variety of perspectives, skills, and approaches. Whether you are building an internal or external evaluation team, there are key knowledge, skills, and abilities you should look for in your evaluation team members:

- ♦ Familiarity with the program, its context, and intended outcomes (i.e., objectives and goals);

- ♦ Familiarity with quantitative and qualitative data collection methods;

- Ability to identify and assess existing data sources that will be used to evaluate your program;
- Ability to work collaboratively with program leadership and staff as well as evaluation team members to assess evaluation outcomes and identify relevant findings from the evaluation;
- Ability to engage stakeholders and community members in data collection and interpretation of results, and;
- Ability to communicate the evaluation findings to the appropriate audience.

This is not an exhaustive list of competencies that evaluation team members should have, but this list provides a general framework to consider when building your evaluation team, whether you are looking internally for evaluation team members or looking externally for evaluation support.

Step Four: Developing a Timeline for your Evaluation Activities

By developing an evaluation timeline you will be able to provide your evaluation team, supervisor, and/or other relevant stakeholders a clear overview of intended evaluation activities. Timing often depends on how the evaluation findings will be used. For example, if you want to measure the progress toward meeting your outcomes to make mid-course correction and improve the program along the way, you don't want to wait until the end of the program to collect and report data to the program leaders.

Example Evaluation Timeline Template

Goal	Objective	Activity	Expected Completion Date	Person Responsible

If you begin evaluation planning by considering the steps above, you ensure effectiveness and accuracy in evaluation outcomes. The survey research and evaluation experts at the Carl Vinson In-stitute of Government are available to conduct evaluations and provide training to increase your organization's evaluation capacity.

How to Improve Team Performance

By Carla Morris

A team leader is an important part of the success or failure of a department. Team leaders are impowered to provide direction and leadership to everyone on the team. Leaders are expected to communicate the goals of the organization and motivate team members to perform to meet these goals.

A successful team leader should always look for ways to improve performance and avoid relying on past results or outdated processes. When looking to improve your team performance, attempt to find ways to engage each member and acknowledge the value of their role on the team.

There are various methods leaders can use to improve team performance. Often, the first step may involve identifying dysfunctions that may exist. In *The Five Dysfunctions of a Team*, author Patrick Lencioni present five dysfunctions that cause even the best teams to struggle with success. He outlines five natural but dangerous pitfalls and steps that can be used to overcome these hurdles to build an effective team. For additional information on Patrick Lencioni book, see page 7 of this newsletter.

Since improving a team performance is always a challenge, lets focus on a few simple ways to improve effectiveness.

- ***Define Goals and Set Action Plans***

    Clearly define what success would look like for your team and communicate that idea in a way that each team member understands the goals and performance expectations. Members of a high performing team know what is expected from them and are more likely to perform at full potential when they are aware of the goal, action plan and individual expectations.

- ***Delegate Responsibility***

    Allow team members to take on new jobs when you pulled in another direction or may have a busy schedule. Delegation allows them to utilize their talents and take on some tasks that you would normally do. This also allows growth and knowledge transfer that is sure to assist the team overall performance.

- ***Communicate Effectively***

    Keeping your team informed and allow the flow of information from the bottom to the top. Schedule regular team meetings to discuss upcoming deadlines, share ideas, set goals, and celebrate success.

- ***Understand Strengths and Weaknesses***

    Take the time to understand everyone on your team and learn their strengths and weaknesses in performing day to day task. This will assist with ensuring your team members are assigned or matched to the right task. It will also help to determine who can useful when you need to delegate new tasks.

- ***Allow Work from Home***

    A 2-Year Stanford [study](#) showed how there was an astonishing productivity boost when employees worked from home. In this newsletter, Lee Wright discussed how leaders could successfully lead finance teams working from home during the current pandemic and offered strategies to achieve this success. Evaluate procedures and processes ongoing to identifying the tools/resources needed to boost productivity and support team members working from home.

- ***Integrate Training and Technology***

    As a team leader, try to find ways to ensure your team is trained in complex areas and identify resources to support day to day tasks. Research and take advantage of the latest applications, software, or other information technology to make tasks easier and will help the team be more productive and efficient.

State officials can improve governance and operations by taking advantage of our instruction and services. The Institute of Government provides the tools and support needed for state officials to get and keep the ball rolling in the right direction.

State Financial Management Program courses will be available as virtual live courses through June of 2021. Take advantage of these course offerings to advance your knowledge and value in the financial arena and help you fulfill your job responsibilities. Virtual live courses will give you the same information without the travel expenses!

Courses are available in the following categories:

Primary Governmental Accounting series: The Primary Governmental Accounting Series gives you a better understanding of how to apply Generally Accepted Accounting Principles (GAAP) to transactions and events that occur in a government setting. The series consists of three classes: Introductory Governmental Accounting I and II and Intermediate Governmental Accounting.

Budget and Financial Management Certification program: The Budget and Financial Management Certification Program offers an overview of the state's budget and fiscal management cycle. Courses in the program include Language of Accounting, Revenue Administration, TeamWorks Literacy and Orientation, Debt Administration, Revenue and Expenditure Analysis, Internal Controls, Budget Administration, and Purchasing Basics.

Electives: We offer many asynchronous online courses that will satisfy CEU requirements and
update your knowledge with the latest standards.

Take advantage of these course offerings to advance your knowledge and value in the financial arena and help you fulfill your job responsibilities. Visit www.cviog.uga.edu/statefinance to learn more!

Leadership Book Recommendations

In **The Coaching Habit**, Michael Bungay Stanier presents coaching as becoming a regular, informal part of the day so managers and their teams can work less hard and have more impact.

Drawing on years of experience training more than 10,000 busy managers from around the globe in practical, everyday coaching skills, Bungay Stanier reveals how to unlock your peoples' potential. Stanier unpacks seven essential coaching questions to demonstrate how--by saying less and asking more--you can develop coaching methods that produce great results.
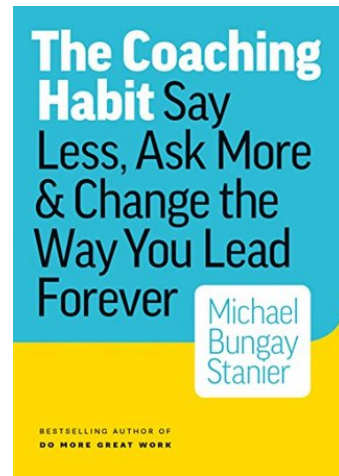
- Get straight to the point in any conversation with **The Kickstart Question**
- Stay on track during any interaction with **The Awe Question**
- Save hours of time for yourself with **The Lazy Question**, and hours of time for others with **The Strategic Question**
- Get to the heart of any interpersonal or external challenge with **The Focus Question** and **The Foundation Question**
- Finally ensure others find your coaching as beneficial as you do with **The Learning Question**

The Five Dysfunctions of a Team

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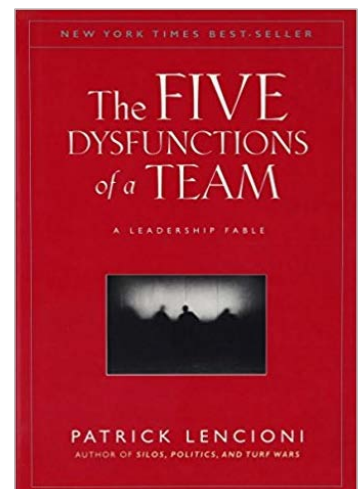
The Georgia Fiscal Management Council

Promotes efficient fiscal management of state government operations, knowledge in governmental financial procedures and practices. In addition, the council provides opportunities for the interchange of ideas, methods, and techniques affecting governmental fiscal management. Membership to the Georgia Fiscal Management Council is open to any State employee engaged in a function related to fiscal operation and/or management. If you would like to join, please complete an application form and submit following the instructions provided.

5 Benefits of being an FMC Member

1. **Professional Development**. An FMC membership give you access to up to date information on fiscal matters.   When a change in methodology, policy or procedure is required, FMC usually hears about it first. Trainings are offered to members through monthly meetings, webinars, annual training conferences, and occasional dinner meetings.

2. **Mentorship**. FMC is made up of many leaders across the state of Georgia. These leaders are seasoned professionals and career state government employees. The depth of knowledge is vast and they provide a strong support system within the fiscal community.

3. **Leadership Development**. A FMC membership gives you access to an organization where the possibilities of participation is unlimited! Build your leadership skills by serving/chairing on a committee or leading an effort.

4. **Networking**. Being a member of FMC allows you to mix and mingle with others in the fiscal community within the state of Georgia. You can establish relationships with others FMC members who share common professional interests and similar business concerns.

5. **Jobs**. Most fiscal officers in FMC share open job or vacancy announcements with the FMC since it represents the state's fiscal community.

The Georgia Fiscal Management Council

Officers & Chairs

Position	Name/Email	Office	Phone#
President	Mike Jackson	TRS	(404) 374-4269
President-Elect			
Past President	Sonja Allen-Smith	DCH	(404) 657-9082
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Treasurer	Rusk Roam	DOE	(404) 656-2502
Membership	Barbara Kaumeyer	Cobb County	(770) 419-6240
Program & Professional Development	Dave Lakly	CVIOG	(706) 248-8872
Scholarship	Teresa Loggins	Agriculture	(404) 686-1104
Website	Nina Gyasi	DCA	(404) 679-5820
Newsletter	Carla Morris	DCH	(404) 463-6673

Scholarships

FMC offers up to two scholarships to eligible college seniors, rising college seniors, or graduate students. FMC scholarships are valued up to a maximum of $1,000.

ELIGIBILITY REQUIREMENTS
- Full or part-time college senior, rising college senior or graduate student.
- A cumulative and major grade point average of not less than 3.0 on a 4.0 scale (transcripts required).
- Endorsement of application by Department Chairperson at current college/university is required.
- A statement that the student intends to pursue a career in public service related to Fiscal Management or Administration.
- A major in Accounting, Public or Business Administration or Finance.

For additional information or to apply contact:
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