Financial Managers’ Meeting

October 27, 2020
• Agenda

1. Opening remarks (Jason Theis)
2. Topics by Susan and Sky
3. November Training course and dates
4. Topics by OMB (Briana and Shelby)
5. Topics by Jason
6. Topics by Amanda
7. Round Table
• **Topics by Susan & Sky**

**Susan**

• Feedback on Labor Expended report training in October
• Due to limited attendance, extending into November.
• Factual Fridays – please bring your questions!

**SKY**

• Discuss combining documents
• Emailing LR’s/BR’s vs JV’s – Different email addresses
November Finance Training

Labor to Expended report (again) – How to make it helpful

November 5: 900 – 1000
November 10: 1100 - 1200
November 18: 1100 - 1200


Click on the training calendar link for the session you want, then copy it to your own calendar! (You won’t receive an automatic reminder from me)
• Topics by OMB

Briana
• FY22 budget planning update
• Board of Regents meeting reminder: November 5th & 6th

Shelby
• COVID-19 transaction tracking and receipts reminder
• Topics by Jason

• October Management Report – Due November 10th
• Invoice timeliness
• Strategic Initiatives (FY21)
• Cash Advances
• Topics by Amanda

• Update on travel
• **Round Table**
  • What do you have to share?
• FY21 Financial Managers’ Meetings

Via Zoom until further notice

December 1
January 26
February 23
March 30
April 27
May 25

All dates subject to change or cancellation