

Finance All-Staff Meeting

9 – 11 a.m. | Sept. 29, 2026 | Rast Room, Bryant Conference Center

THE UNIVERSITY OF
ALABAMA[®]

Division of
Finance and Operations
Finance



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Agenda

1. Welcome

President Mohler

2. Introductions

Dan Layzell—Executive Vice President, Chief Operating Officer and Treasurer

3. Phase 1 Recap: Work Completed to Date

Melissa Barnett — Assistant Vice President, University Budget and Campus Financial Affairs

4. Roadmap for Upcoming Work

Melissa Barnett — Assistant Vice President, University Budget and Campus Financial Affairs

5. New Finance Organizational Structure

Julie Shelton— Senior Associate Vice President for Finance and Chief Financial Officer

6. Capstone Convergence Update and Demo

Kevin Donahoe—ERP Project Implementation Manager

Meredith Boteler—Executive Director, Financial Technology & Data Integrity

7. Process Improvement Spotlight: Student Payments

Brandee Tickle—Executive Director, University Tax

8. Next Steps and Continued Engagement

Melissa Barnett — Assistant Vice President, University Budget and Campus Financial Affairs

9. Closing Remarks and Adjournment

Dan Layzell—Executive Vice President, Chief Operating Officer and Treasurer



Introductions



Dan Layzell

Executive Vice President, Chief
Operating Officer and Treasurer



Julie Shelton

Senior Associate Vice President for
Finance, Chief Financial Officer



Melissa Barnett

Assistant Vice President, University
Budget & Campus Financial Affairs



Julie Ember

Executive Director, Campus Financial
Affairs



Becky Scheeff

Executive Director, Campus Financial
Affairs



Tynan Kozak

Executive Director, Campus
Financial Affairs



Brian Harrison

Executive Director, University
Finance



Kevin Donahoe

ERP Implementation Manager



Meredith Boteler

Executive Director, Financial
Technology and Data Integrity



Brandee Tickle

Executive Director, University Tax



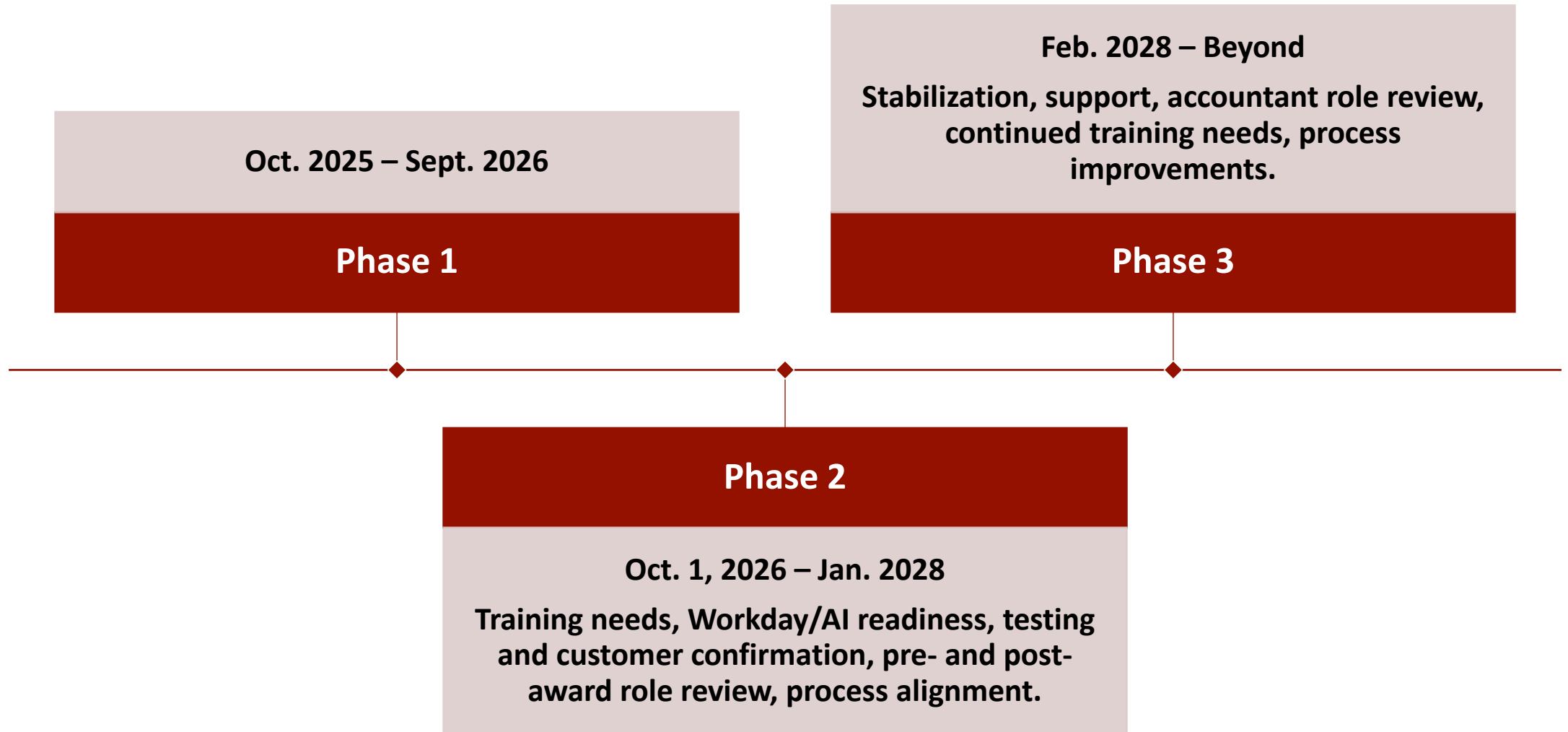
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Phase 1 Recap

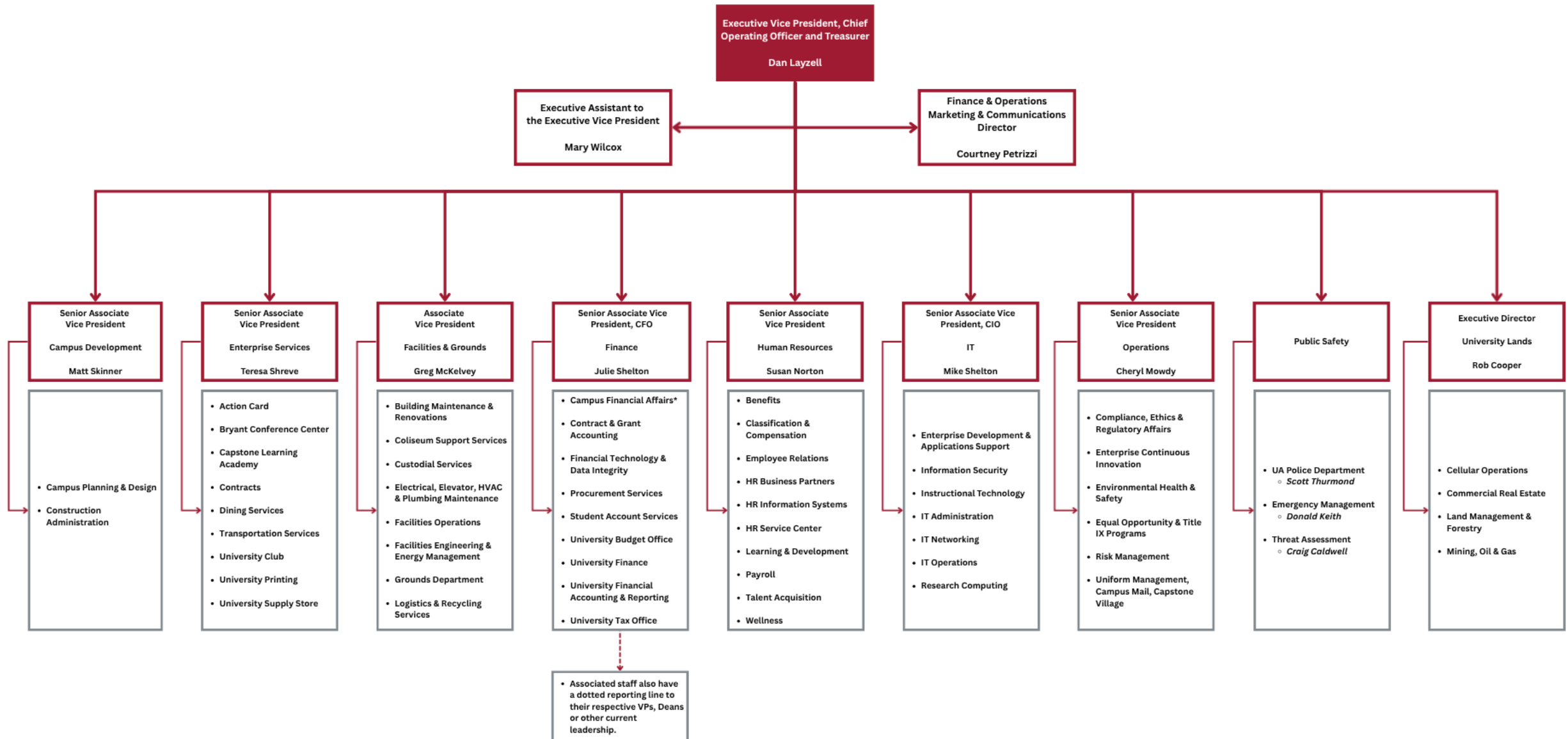
- Conducted 44 in-depth desk audits to better understand current roles, responsibilities, workflows and support needs.
- Established Campus Financial Affairs as a new area to support greater coordination, consistency and transparency across financial operations.
- Refined the Finance organizational structure to clarify leadership roles, reporting relationships and areas of support.
- Reviewed Accounting Assistant positions (80), including responsibilities, work performed and outcomes, to identify training and professional development needs.
- Scheduled the UA Finance Leadership Development Series for directors and front-line supervisors, with additional training opportunities to be identified and sustained in Phases 2 and 3.
- Identified early process improvements that will be highlighted later in today's meeting.



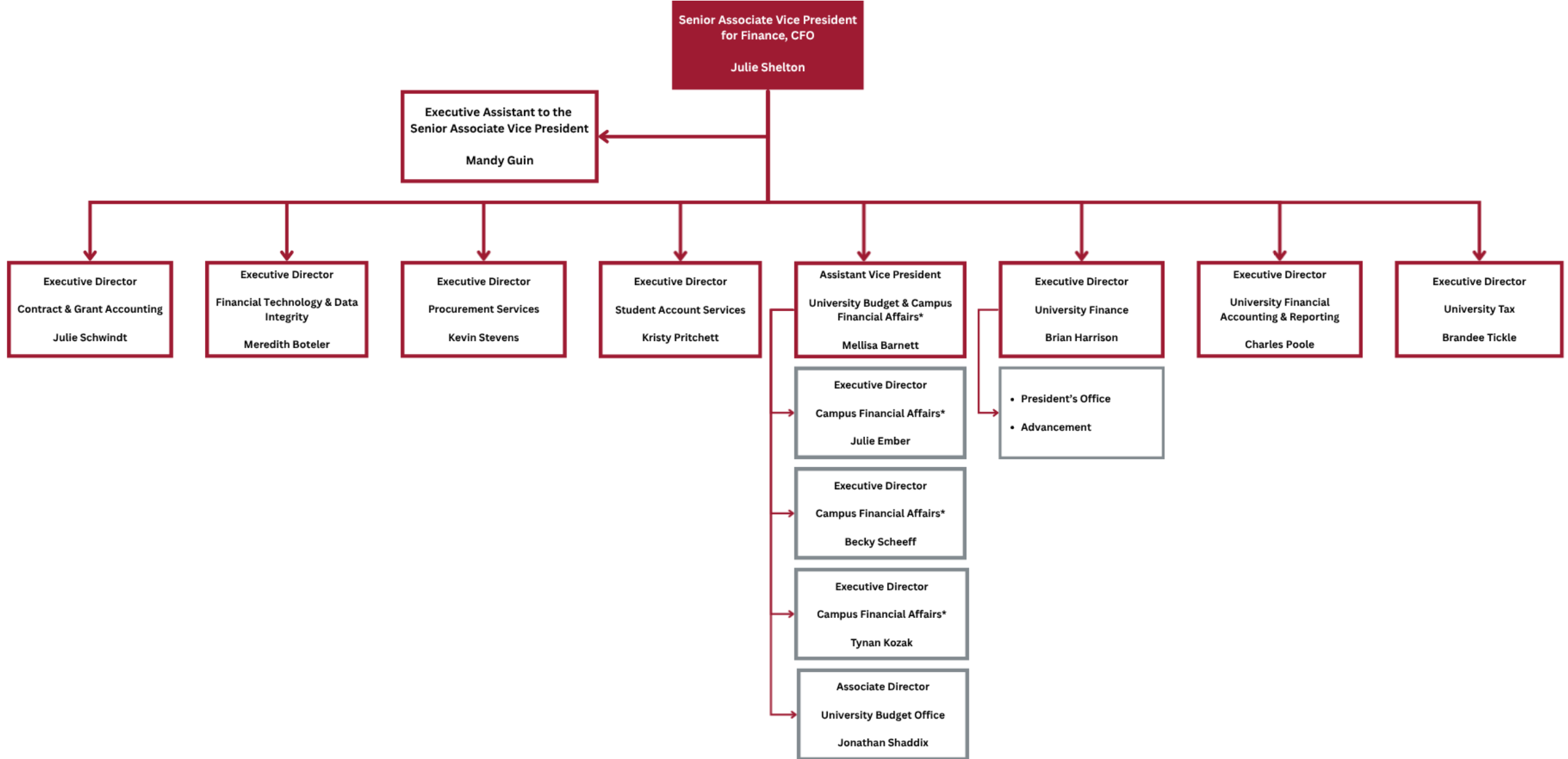
Roadmap for Upcoming Work



Division Organizational Structure

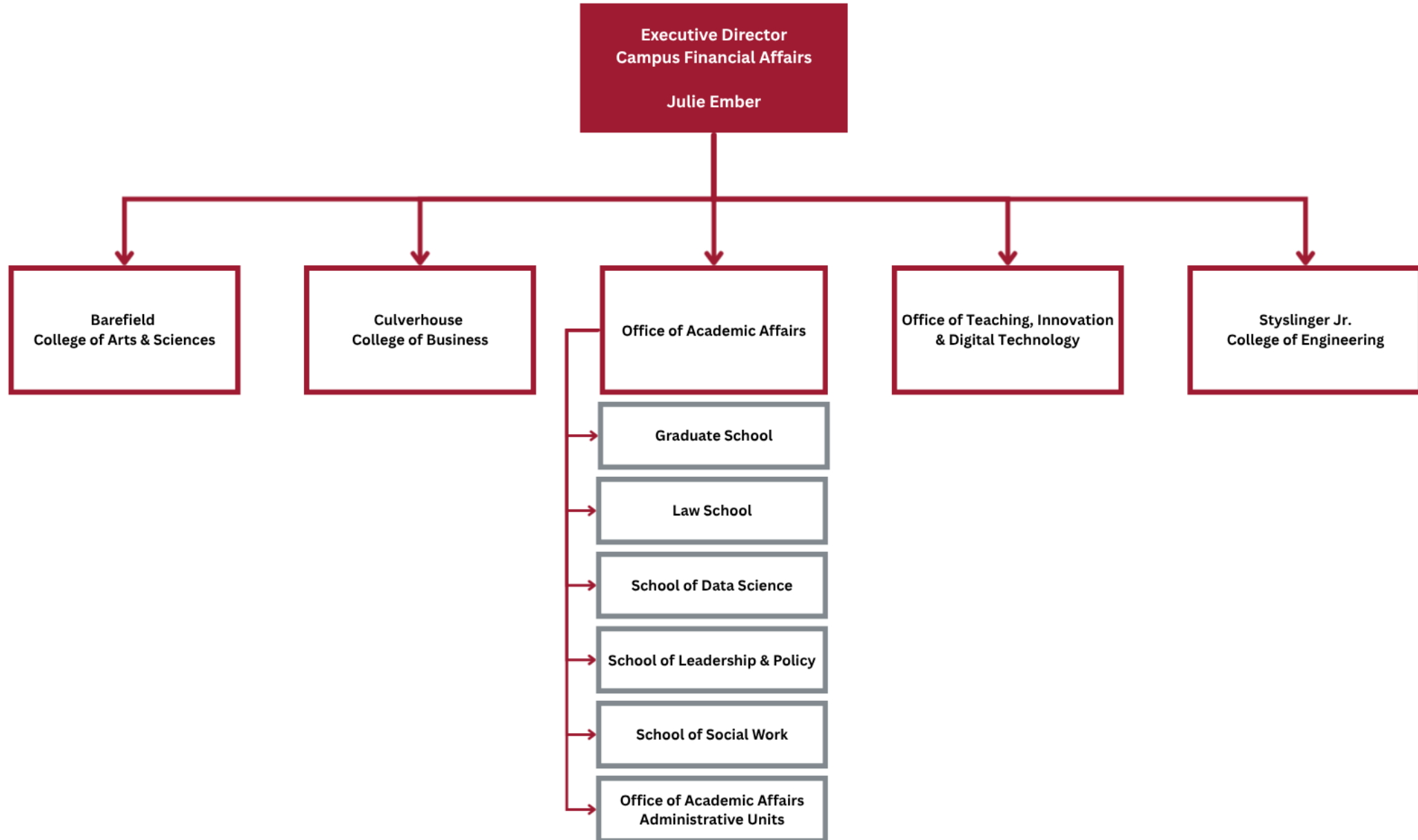


New Finance Organizational Structure

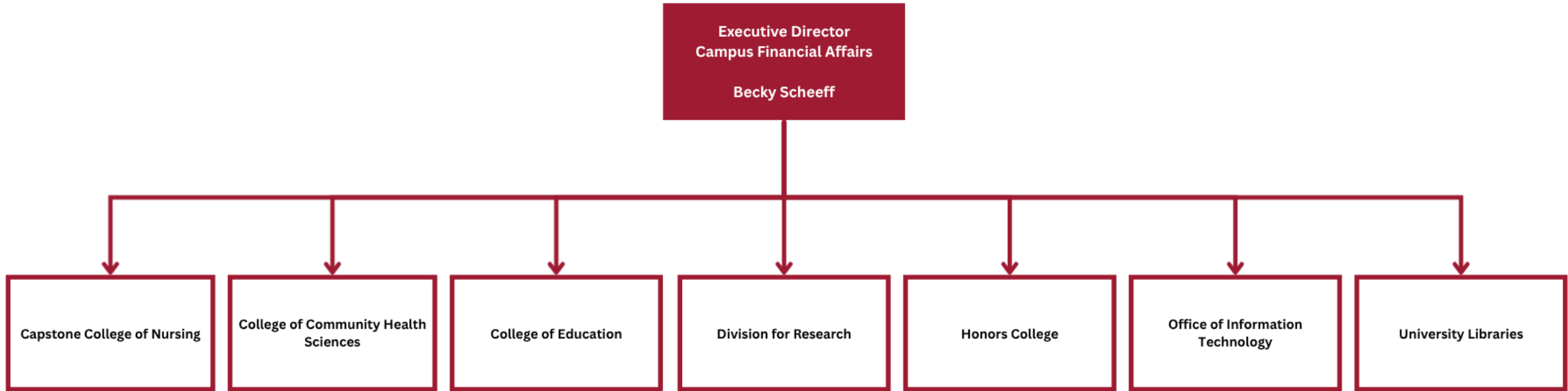


* Associated staff also have a dotted reporting line to their respective VPs, Deans or other leadership.

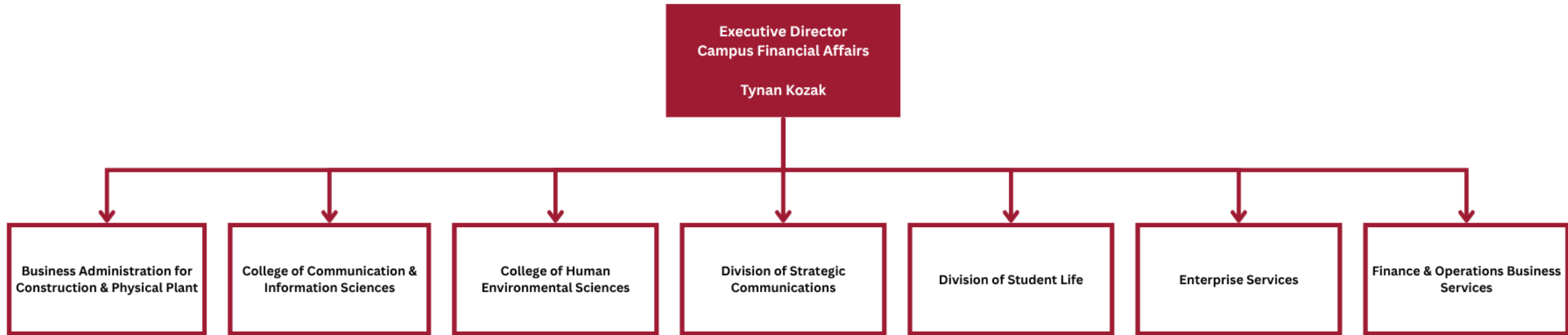
New Finance Organizational Structure



New Finance Organizational Structure



New Finance Organizational Structure





Capstone Convergence Program Update

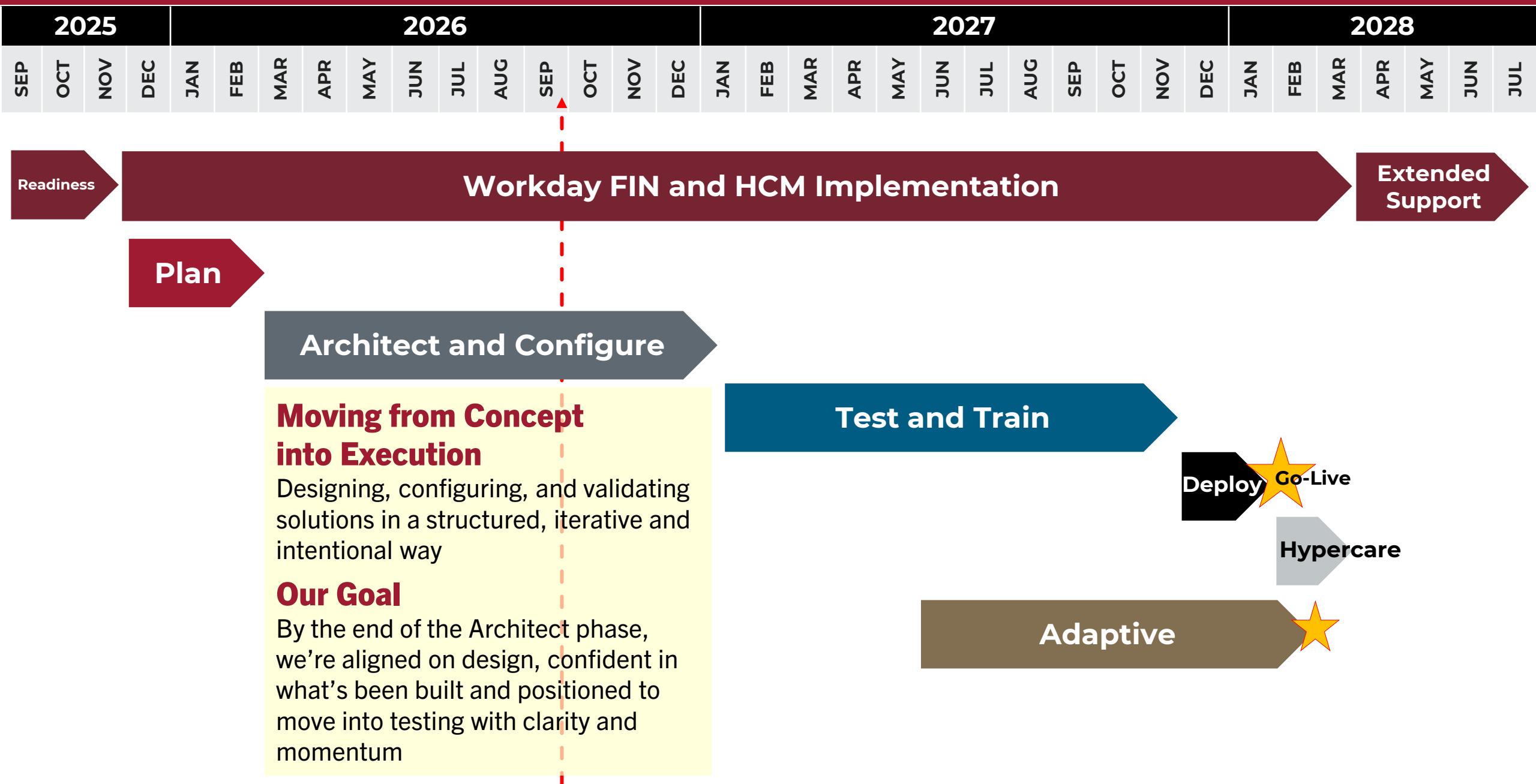
Finance All Staff Meeting
September 29, 2026



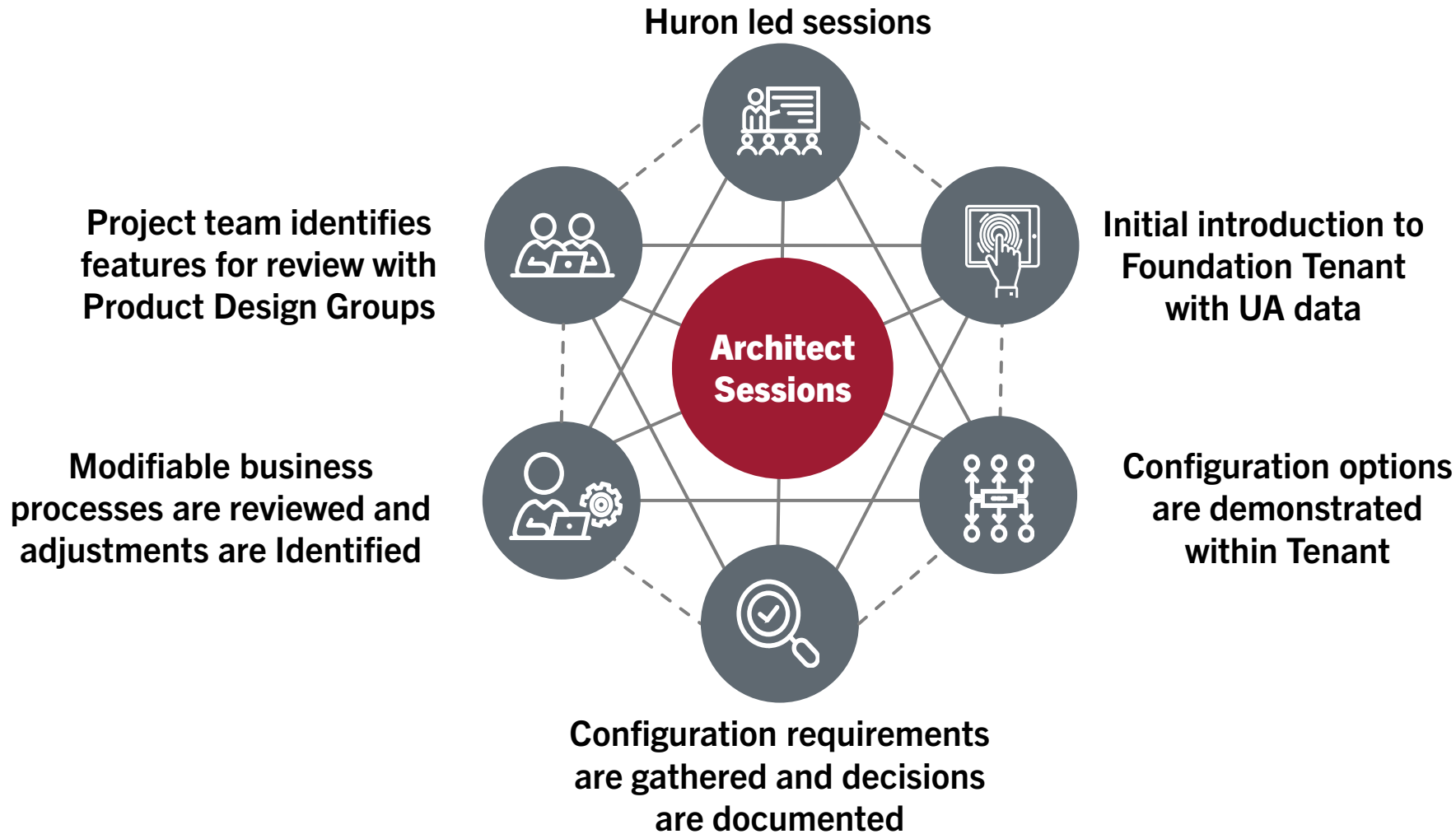
Kevin Donahoe, ERP Implementation Manager

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High Level Implementation Timeline - Workday



Architect Session Overview



These sessions are for making decisions, testing assumptions, and aligning.

The aim is progress and clear next steps, not perfection from the start.

What are Customer Confirmation Sessions (CCS)?

November 9 - December 4



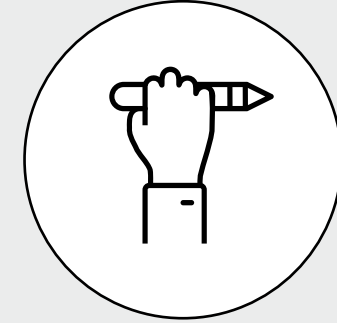
Demonstrations

Share processes and configurations with a wider audience and encourage input from different departments



Opportunity to Build Proficiency

With UA leading and Huron providing support, UA enhances its readiness to carry out testing and ensure preparedness for go-live



Chance to Document Feedback

Document business processes that do not meet UA requirements and note where additional configuration or changes may be required

These sessions are structured walkthroughs of configured Workday processes that help confirm alignment with stakeholders, gather feedback, and ensure the solution is ready for end-to-end testing.

Key Activities Underway



Finance

FDM Mapping

Collaborative sessions between Finance Project Team and college/division finance staff to verify Foundation Data Model mappings and prepare financial data for Workday conversion



Human Resources

Organization Validation

Supervisory Organization structure validation in progress, verifying reporting chains and manager assignments across colleges



Technical

Application & Integration Inventory

Colleges identifying all systems with finance or HR data impact

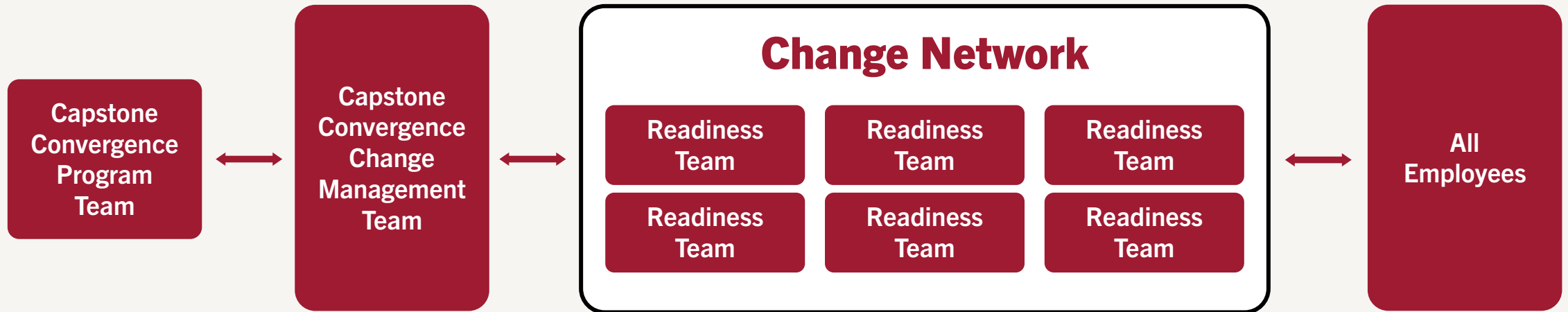


Security

Role Mapping Oct-Nov

- Workday security role mapping coming October-November
- Roles follow positions, not individuals, accurate position data is essential

Change Network Overview



24 Local Readiness Teams

- Academic Affairs - Main
- Advancement
- Barefield College of Arts & Sciences
- Capstone College of Nursing
- College of Communication & Information Sciences
- College of Community Health Sciences
- College of Education
- College of Human Environmental Sciences
- Community Affairs
- Culverhouse College of Business
- Enrollment Management
- Finance & Operations
- Graduate School
- Honors College
- Intercollegiate Athletics
- Law School
- Office of the President
- OTIDE
- Research and Economic Development
- School of Social Work
- Strategic Communications
- Student Life
- Styslinger College of Engineering
- University Libraries

Finance's Role in Driving Readiness and Change

Help employees understand and prepare for change

- ✓ Employees look to you for direction
- ✓ Help explain why the change matters
- ✓ Your engagement helps builds trust and confidence
- ✓ Your support drives engagement and adoption
- ✓ Successful change depends on people, not just technology

Your visible support removes roadblocks and drives local accountability within your college or division

Upcoming Activities



SPREAD THE WORD

- [Change Champion program](#) launched campuswide, encouraging Workday learning, readiness participation, and engagement
- Explore the [Capstone Convergence website](#) for program information, resources, and key updates
- Sign up for the [Capstone Convergence newsletter](#) to stay connected and informed throughout the journey



THE MORE YOU KNOW

Readiness Workshops

- [Reserve your spot](#) for the **10/28 Workday 101: Foundation Data Model** session to preview how finances will be organized and reported in Workday

Change Network Activities

- **September:** FDM Validation using FDM Tool
- **October:** Security Role Mapping
- **November:** Customer Confirmation Sessions



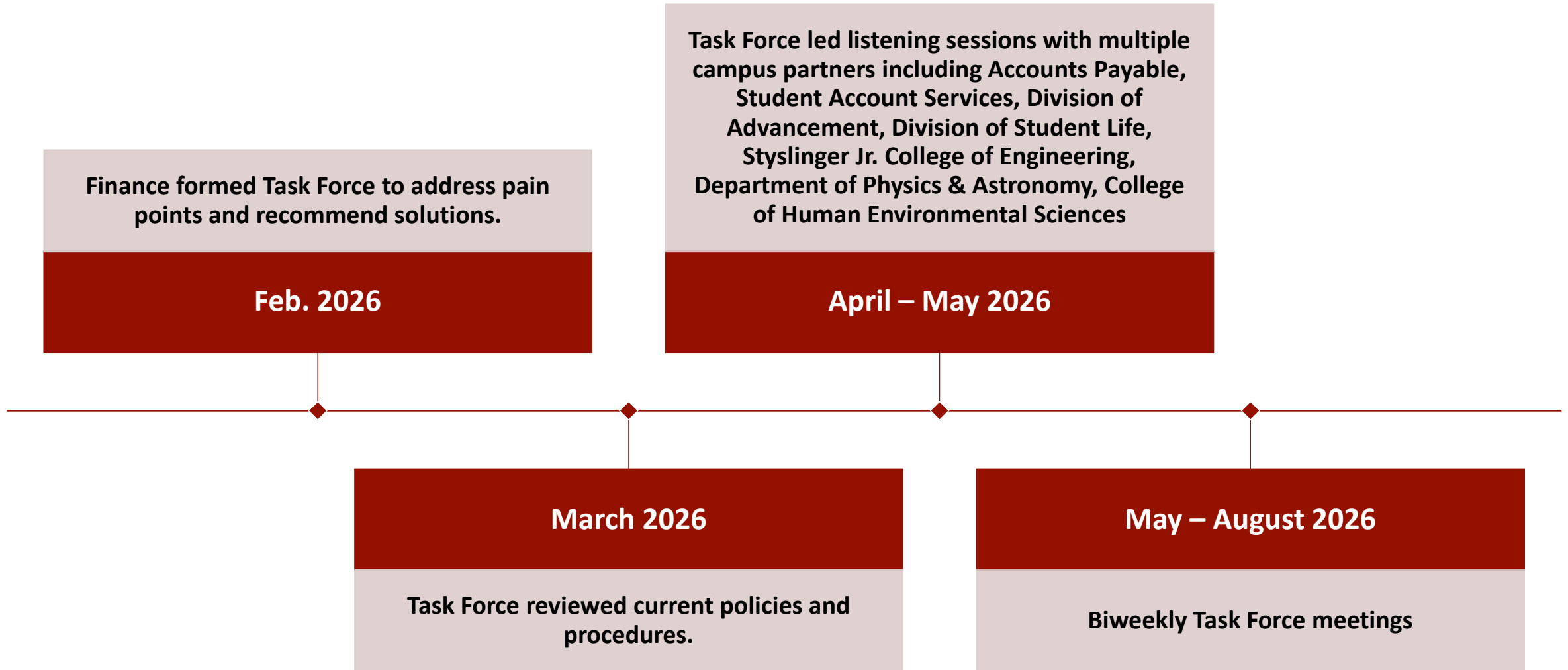
Workday Finance Demo



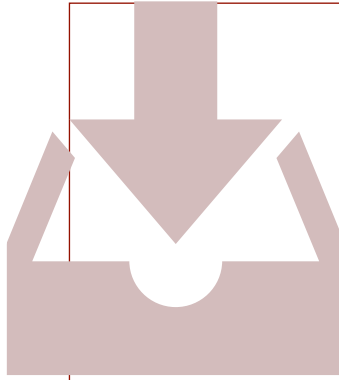
Meredith Boteler, Executive Director Financial
Technology & Data Integrity

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Process Improvement Spotlight: Payments to Students



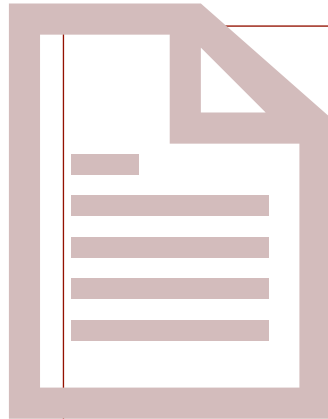
Process Improvement Spotlight: Payments to Students Identified Pain Points



Consistency & Processes

Students and/or student travel; Departments lacked consistent guidance and clarity.

Some processes (e.g., G-STAR) have changed in recent years, and current policy does not reference system.



Form Confusion

Departments processing payments to students and ensuring compliance used two separate forms for SAS and AP.

Two separate forms led to confusion by initiating departments and caused payment processing to stall.



Process Improvement Spotlight: Payments to Students Identified Proposed Solutions

Policy

- Revise policy to reflect updates guidance and compliance steps.

Workflow

- Develop new K2 workflow- Payment to Student Preauthorization Form
 - Will replace 2 fillable PDF forms: SAS Payment to Student Form + AP Department Certification Statement for University Business Expense Student Reimbursement.
- Provides workflow that allows initial routing to be determined intuitively based on information department provides.
- Allow documentation to be attached
- Send a completed form back to department automatically for their records + P-Card reconciliation.

Training

- Training for areas reviewing and processing payments (Accounts Payable + Student Account Services).
- Training for payment initiators and those responsible for booking student travel.



Process Improvement Spotlight: Payments to Students Next Steps

- Finalize policy revisions.
- Complete testing of new K2 workflow.
- Training opportunities—November
- Phased-in implementation—Target date for all areas to transition to new K2 workflow: Jan. 2027



Next Steps & Continued Engagement

- Continued staff feedback and engagement opportunities
- Capstone Convergence newsletter sign-up for upcoming trainings, testing, review and customer confirmation sessions
 - Next readiness and engagement opportunity- Oct. 14: Change Network Meeting; Workday Security + Security Role Mapping
- Additional training and support opportunities developed based on identified needs (e.g., Workday)
- Compliance training + Conflict of Interest disclosure
- Next Finance All-Team Meeting planned for Spring 2027
- UA AI Experience

