**Sacramento Chapter of the Institute of Internal Auditors**

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**Message From The Editor...**

I am happy to announce that Ryan Estis (www.ryanestis.com) has given me full approval to include his content in our monthly newsletters. I will try to include information that all of us can utilize in our daily routines at work and away from the workplace. As a keynote speaker, Ryan is known for his innovative ideas on leading change, improving sales effectiveness and preparing for the future of work. He was recently recognized as one of “the best keynote speakers ever heard” by Meetings & Conventions magazine alongside Tony Robbins, Bill Gates, Colin Powell and Mike Ditka.

As always, please feel free to email me anytime, with job announcements, newsletter suggestions, comments and/or ideas for our member newsletter. Email me at sohara@sco.ca.gov - HAPPY 2018!

Scott Ohara
Newsletter Editor

**NEW PROGRAM FOR JANUARY 2018**

JUST CONFIRMED!

**THURSDAY JANUARY 18, 2018**

THE INSTITUTE OF INTERNAL AUDITORS
SACRAMENTO CHAPTER PRESENTS:

PRESIDENT OF THE SACRAMENTO KINGS:
JOHN RINEHART

**TOPIC:**
STATE OF THE SACRAMENTO KINGS,
GOLDEN1 CENTER AND DOWNTOWN COMMONS

**SAVE THE DATES**

For more information see: https://chapters.theiia.org/sacramento/Pages/default.aspx

January 16, 2018: PERFORMANCE AUDITING

**Location:**
DoubleTree Suites
11260 Point East Drive, Rancho Cordova, CA 95742

**Time:** 7:30 am to 4:30 pm (7:30 am-8:00 am: Networking Breakfast)

January 18, 2018: State of the Sacramento Kings, Golden1 Center and Downtown Commons

**Location:**
Holiday Inn Express & Suites
2224 Auburn Boulevard, Sacramento, CA 95821

**Time:** 7:15 am to 8:00 am (Check-In, Networking and Breakfast)
8:00 am to 9:40 am, speaker

Like the Sacramento Kings?

As an added-value to you, we have access to discounted group tickets for most of the upcoming Sacramento Kings home games at Golden1 Center.

Jan-Feb 2018 Home Games

Jan 17: Jazz
Feb 2: Warriors
Feb 3: Mavericks
Feb 5: Bulls
Feb 9: Trailblazers
Feb 22: Thunder
Feb 24: Lakers
Feb 26: Timberwolves

If you are interested in tickets to the above home games, please feel free to email me at sohara@sco.ca.gov
The Institute of Internal Auditors Sacramento Chapter
Thursday, January 18, 2018

7:15 am – Check-In, Networking and Breakfast
8:00am to 9:40am – Session
9:40-10am – Q&A

Holiday Inn Cal-Expo
2224 Auburn Boulevard, Sacramento, CA 95821
phone (916) 923-1100
(easy freeway access, off the I-80), ample free parking onsite

To register copy and paste url into browser- https:eiseverywhere.com/301684

Program Overview:
“State of the Sacramento Kings, Golden1 Center and Downtown Commons (DOCO)”

Learning objectives include:

- Hearing the state of the Sacramento Kings, Golden1 Center, and Downtown Commons, after the arena’s first year of operation
- Experience how a business (Sacramento Kings) transitions from building a new headquarters (Golden1 Center) to developing area around the new headquarters (DOCO, or the revitalization of Downtown Sacramento)
- Experience how a business is required to shift resources from cost oversight efforts from Golden1 Center construction to operational costs of the Sacramento Kings, and back to new construction projects as they come online (“live”)
- Hearing the goals and objectives of monitoring the various construction projects and related around the Golden1 Center, and budgeting/planning for new future construction
- Philosophy towards and planning for the re-use of the Sleep Train Arena building and land

This program will include a visual presentation covering the above objectives, and is an update to his first appearance with us in February 2015.
John Rinehart enters his 18th season with the Sacramento Kings, first as President, Business Operations.

Rinehart oversees the operations of Fast Company's “most innovative company in sports,” including the state-of-the-art, award winning Golden 1 Center as it enters its second season, the organization's real estate business holdings, entertainment portfolio and revenue development strategy.

Through a $1 billion strategic investment to build Golden 1 Center and Downtown Commons (DOCO), the Kings have profoundly impacted the region's economy, reenergized Downtown, and created a culture and lifestyle district that has placed Sacramento in the national spotlight.

Previously, he served as Executive Vice President, Business Operations and Chief Financial Officer where his duties included contract negotiation, player contract compliance and analysis (NBA Tax and Escrow system), financial analysis, financial reporting, budgeting, financing administration, arena programming and services, legal affairs, insurance and tax requirements.

In his time with the Kings, Rinehart has negotiated several key agreements, including the structure of the public/private partnership with the City of Sacramento, debt financing, cable, over-the-air, and radio broadcast contracts, ticketing agreements, food and beverage and merchandise agreements, and building naming rights.

Prior to joining the Kings, Rinehart spent two years as the Director of Finance for Anaheim Sports, Inc., where he oversaw the finance and accounting functions of the Anaheim Angels (MLB), Anaheim Mighty Ducks (NHL) and Edison International Field of Anaheim. He also spent two seasons as manager of financial reporting for the San Francisco Giants (MLB). Prior to beginning his career in professional sports, Rinehart spent five years with the public accounting firm Price Waterhouse Coopers LLP in San Francisco.

Rinehart graduated with a bachelor's degree in accounting from Villanova University in 1991. He and his two daughters Kaitlyn and Megan reside in the Land Park area of downtown Sacramento.
In my position as Chief of Internal Audits, I have had the opportunity to work with exemplary staff and management across my entire organization.

As 2017 ends, I would like to reflect and share what I have and continue to learn, as well as the challenges experienced while increasing workplace communication between Internal Audits and all operational divisions.

I am fully convinced that for any organization to enjoy growth and stability, it requires a robust system of Governance, Risk, and Control (GRC). Therefore, I would like to share some of my experiences with the hope that our IIA chapter members and associates can draw from as they carry out their internal audit functions and activities, and try to add value to their operational processes.

Governance can be best defined as the combination of processes and structures that the board or executive management implements to inform, manage and monitor the organization’s activities and operational processes so that goals and objectives are achieved in an efficient and effective manner.

Internal auditors should be knowledgeable of their organizational lines of reporting and operational processes. Such knowledge helps auditors to design audit procedures that enhance their ability to identify any gaps that may exist within the organization’s operational processes and provide realistic and implementable recommendations that add value to the organization’s operations. Auditors should also be required to discuss and document every phase of an operational process within flow charts in collaboration with the responsible operational staff and managers.

My experiences have also helped me to understand how important concise, realistic, measurable, time-targeted and achievable objectives can reduce risk. Specifically, risk is the possibility of an event or a situation occurring that will have an impact on the achievement of program objectives. Risk measurement units must also relate to possible impact and likelihood. Therefore, internal auditors must strive to work closely with their audit clients when developing their audit objectives for audits and reviews. Such proactive effort will enhance the auditor’s knowledge and ability to assess and identify risk and determine efficiency and effectiveness of operations.

Control refers to actions taken by an organization’s management to manage risk and increase the likelihood that an organization achieves its goals and objectives.

Therefore, it is my belief that for internal auditors to receive recognition and respect, they must be knowledgeable of and utilize GRC concepts in their audits. Without GRC, internal auditors may not be able to help staff and managers understand the importance of internal controls to reduce operational risks and increase the likelihood of meeting goals and objectives.

Please feel free to contact me at any time to discuss GRC further. As information, I will now be contributing a similar message in all future newsletters on relevant audit topics.

Until next time, happy holidays!

Christian Okoye, Chief
Management Audit Review Services
California State Controller's Office
(916) 327-0698
I could listen to Bill Madison, the CEO, Insurance, of LexisNexis Risk Solutions, talk about leadership all day. He truly understands that culture is the key to building a business prepared to win into the future, and he is boldly challenging the status quo in the insurance industry.

Purpose-driven, people-focused leadership drives performance and profitability. Put the customer at the center of everything you do. Listen. Learn. Grow together. Leadership is about service, sacrifice, humility, taking care of people and helping them realize their full potential.

This was his message in California, at the 2017 Customer Advisory Meeting (CAM). It’s why I can’t wait to join Bill again this March in London for his UK 2018 CAM Meeting.

Before then, I wanted to share some of his insights on leadership, purpose and disruption with you in this deep dive Q&A. It’s a bit longer than most of my usual blog posts, but it’s worth the investment if you want to better understand how to lead in the service of others. Enjoy!

HOW WOULD YOU DESCRIBE YOUR PHILOSOPHY ON LEADERSHIP?
In a word? Transparency. We can’t afford hidden agendas. More importantly, we don’t have time for them.

Instead, I focus on creating a common cause or a purpose. We don’t have a mission statement. We don’t have a vision statement. We have our purpose. That’s where it all starts from. Our purpose is our guiding light.

If you are truly behind your purpose, you will never have to worry about your numbers.

WHAT IS YOUR PURPOSE?
We are innovators, passionate about challenging the status quo and improving outcomes.

What’s just as important is what we don’t say. The management team and I didn’t want the word “insurance” to be in our purpose statement. We wanted to really have something meaningful that was true to the core of what we’re really all about. True to our culture.

We have to innovate. We have to be creative. We’re challenging the status quo. A lot of what we do pushes our customers to challenge their own status quo. We bring solutions into the market that require our customers to think differently. Those that do put themselves within the markets that they’re serving. We’re constantly looking for improvement — for us and for them.

WHAT DOES IT TAKE TO INSPIRE THAT MINDSET ACROSS YOUR TEAM?
It starts with my actions as the leader. Personally, I want to be a little bit better today than I was yesterday. I’m not always successful, but at least I strive for it. I realize that I’ve got a huge microscope on top of my head, whether I like it or not. And I’ve got to live and breathe what I’m preaching and what I expect out of the associates. I’m looking for them to improve, but I’ve got to look at myself first.

I can’t say I always thought that way. It was probably about five or six years ago, I had someone comment on what I was wearing. Then the question was summarizing activities for us and for them.

But how you look, how you act, what’s coming out of your mouth, how those conversations are taking place are what people hang on to. It all matters.

It’s part of the responsibility of being a leader.

In addition to being mindful of my own actions, I make an effort to communicate a lot. I have a weekly report that goes out that summarizes activities across the business. We have three all-hands meeting events each year. I have newsletters that go out. So we’re constantly pushing out this intelligence as well as what’s happening across the business.

YOU PLACE A LOT OF EMPHASIS ON CONSISTENCY, DON’T YOU?
Oh, definitely. My words may be slightly different, but the message is massively consistent.

Sometimes I get to a point where I’m thinking, “Oh god, everybody’s got to be massively bored with it.” And invariably, I will have someone walk up to me and say, “Oh Bill, now I get it.” The light bulb went off for them.

I have to keep in mind that we’re hiring a lot of new people. Even if I’ve said something a million times, some are hearing these messages for the first time.

WHAT DO YOU SEE AS THE BIGGEST CHANGE UNDERWAY RIGHT NOW IN THE INSURANCE INDUSTRY?
I think it’s the further use of data and analytics. I mean, it’s been core to what the insurance industry has done for a couple of decades now. But now they are really changing their business processes. They’re looking at it as a way to be more efficient. They’re looking at data and analytics to make more informed decisions even more consistently without human intervention. I think we’re going to see this massive change, and it goes hand in hand with the technology changes in our vehicles and homes, how all this becomes interconnected to give more and more intelligence to the insurance industry so they have a richer understanding of risk.

Now we’re starting to see data being captured a lot more rapidly and becoming available to more companies. Then the question becomes, how can the industry manage this information at the pace it’s being developed? That’s where we come in. We provide the platforms that normalize disparate data assets into a way our customers can ingest it. We’re talking a lot about executing today with tomorrow in mind. We’re constantly thinking about the future.

YOU’VE TALKED A LOT ABOUT THE VALUE OF PURSUING A HOLISTIC APPROACH IN INSURANCE. TALK ABOUT THAT A LITTLE.
This is an idea that we started to put out in the marketplace five or six years ago, and it’s really starting to resonant in a big way. We like to talk about
Most insurance companies are organized to fit that linear model. They have a quoting group, they have an underwriting group, they have a retention group, they have a compliance team, they have a claims organization, and so on. They rarely share intelligence across that relationship they have with the consumer.

We’re trying to break down these barriers within the insurance carriers. We talk a lot about how every time there’s a touch point with a consumer, that’s a touch point of knowledge. How do we infuse that touchpoint with the other things we know about that consumer?

Here’s an example: Let’s say a customer has an auto accident, and you get them a check within three to four days. You went above and beyond as their insurance carrier. You’ve got a happy customer.

What else can you connect with that happiness? We can alert you that your customer also owns a home, giving you a reason to reach out again and see if they’d be interested in homeowners coverage with you.

Then that whole conversation starts all over again. You’re sharing knowledge and bringing more intelligence back into the relationship.

We have a platform called LexisNexis® Active Insights. So if certain things are happening within your household that are of relevance to the insurance carrier, we can proactively push that back to the insurance carrier so they have more in depth knowledge about you as well. You now have a kid of age that has their driver’s license. Is that something that the insurance carrier would like to know? And should that new driver be listed on the policy?

Now you have an event that you can proactively go back to the household, verify, and then offer services and solutions to be sure you as a policyholder are covered when you most need it.

YOU BEGAN YOUR CAREER AS A CUSTOMER SALES REPRESENTATIVE. HOW HAVE THOSE EXPERIENCES SHAPED YOUR APPROACH TO LEADERSHIP, NOW THAT YOU’RE A CEO?

Starting off in sales gave me an appreciation for what makes business work. It’s the customers. It’s identifying a market need and creating a solution that addresses that need. That’s been core to me personally, but it’s also core to our business and how we execute on our solutions. It’s core to how we’re helping our customers drive their business agendas and achieve their objectives.

Being exposed to that side of the business at a young age really helped me appreciate that. It’s not about how we’re always selling; it’s about how we’re always listening.

ABOUT
Ryan Estis understands the challenges business leaders and top performers face, because he’s been in their shoes. He spent 15 years helping companies connect with employees and customers as an ad agency executive. His work spans a wide range of industries and clients. Eight years ago, he decided to put that experience into practice as a speaker and consultant. He travels all over the world, getting an inside look at what the world’s best companies do differently. Ryan shares that insight with leaders and top performers, helping them initiate change, improve performance and deliver growth.

Ryan has been recognized as one of “the best keynote speakers ever heard” by Meetings & Conventions magazine. His presentations include original research and customized insight for each audience. He inspires audiences with case studies that always include powerful, relevant stories that resonate long after the event ends. Attendees leave every event with a specific plan for applying their new ideas once they get back to work. His ideas have recently been featured in Forbes, Inc., Fast Company and Entrepreneur Magazines.

His clients include AT&T, Motorola, MasterCard, Adobe, MassMutual, the National Basketball Association, the Mayo Clinic and Prudential. Ryan gets to know every client’s business and customizes all keynote presentations and corporate seminars to deliver insight that makes an immediate impact.

NEW PROGRAM FOR JANUARY 2018

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THURSDAY JANUARY 18, 2018
THE INSTITUTE OF INTERNAL AUDITORS SACRAMENTO CHAPTER PRESENTS:

PRESIDENT OF THE SACRAMENTO KINGS:
JOHN RINEHART

TOPIC:
STATE OF THE SACRAMENTO KINGS,
GOLDEN1 CENTER AND DOWNTOWN COMMONS
https:eiseverywhere.com/301684 to register
OVERCOME YOUR FEAR OF FAILURE

“Do you want to partner on a live event to help other people build the kind of business and life you have created?”

I hesitated. I could feel my chest tightening. That little voice of doubt was now whispering a little louder.

“You aren’t good enough.”

That is the “fear” talking to me. That little voice. That scared little boy. My fear of failure. I mean, of course I wanted to do my own live event! The idea of 50 people joining me in Minneapolis to invest in a weekend of learning, sharing, growing, connecting and preparing to build businesses should be the easiest “Yes” in the world! And yet, there was that little voice. And my coach, Jane Atkinson, was waiting for an answer.

I decided to take the leap: “Hell yes, Jane. I’m in!”

Just like that, Accelerate Live 2017 was born. After months of hard work and planning, we’ll welcome those 50 people to my hometown this weekend. It’s going to be epic and I simply cannot wait to get started!

In hindsight, the most epic failure would have certainly been to succumb to that little voice and let the fear of failure overwhelm me into passing on this weekend all together.

However, I’ve learned how to move through my fear and ultimately the same steps I used to decide and join Jane on this journey are the same ones I use anytime I need to get unstuck.

CONFRONT THE FEAR

At this point in my life and career, I now know that fear is a normal companion anytime I consider stepping out of my comfort zone to embark on something new. I also know that most of what I fear never actually manifests into reality.

So I confront my fears directly: I write them down.

Then I consider the probability of these things actually happening. What are consequences would be if they actually did? What would it take for me to recover? (The probability of nobody showing up this weekend in Minneapolis simply wasn’t very likely or based upon rational, logical thinking.)

I also consider the consequence and cost of not taking action, and I write that down too. I find this step to be incredibly powerful.

What is the cost of staying in a bad relationship? What is the cost of staying in a job that makes you miserable? What is the consequence of not improving your health and wellness?

Compound those costs over a five year window and you might have a different resolve toward taking action now.

The opportunity cost of missing out on this weekend became unimaginable to me.

DECIDE AND COMMIT TO ACT

The best antidote to fear is a bold, specific, intentional, committed action.

That action will also catalyze the universe to conspire in your favor to lend the people and resources you need to make meaningful progress.

In the absence of action, that little doubting voice tends to get louder, producing all kinds of false narratives and limiting beliefs about the future. In the absence of action, it’s easy to get stuck.

The goal isn’t to stop being afraid. It’s to create the right perspective and muster up the courage to move past fear and make meaningful progress. I’ll never be fearless, but I absolutely can step forward knowing that what lies on the other side of bold, decisive action in the face of fear is victory.

2018 is going to arrive. How you arrive will be a direct reflection of the decisions you make and action you today. The time is now!

I can’t wait to see everyone tomorrow for #AccelerateLive17. Let’s dance with our fear, move past our own self-imposed limitations and prepare for impact!

ABOUT

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NEW FOR 2018

**Continuing Professional Education (CPE) and Continuing Professional Development (CPD) Requirements**

In 2018, two CPE/CPD credits must now be earned in Ethics.

**New Important Laws for California**

**SALARY INFORMATION (Assembly Bill No. 168)**

Under the new bill employers are prohibited from asking salary information of an applicant. Employers are also prohibited from relying on salary history as a factor in determining salary for a new employee.

**EMPLOYERS BANNED FROM ASKING CRIMINAL HISTORY ON APPLICATIONS (Assembly Bill No. 1008)**

This new law bans employers, state agencies, and public utilities with five or more workers from including, on any application, any questions about an applicant’s conviction history. Employers are not to consider a person’s criminal background until the applicant has received an offer. And if an employer then decides to take back the offer, the employer is required to notify the applicant in writing, with specific information, as to why the offer is being rescinded. Applicant is allowed to challenge, and the employer is required to review that challenge.

**WORK SITE IMMIGRATION ENFORCEMENT AND PROTECTIONS (Assembly Bill No. 450)**

This law protects workers from immigration enforcement while on the job. An employer or someone acting on behalf of an employer is not allowed to let an immigration agent enter non-public areas of a work place unless the agent has a warrant. Public and private employers can face fines up to $10,000 for each violations.

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**WET WEATHER DRIVING TIPS FROM AAA**

Spring and summer showers may mean flowers, but wet pavement contributes to nearly 1.2 million traffic crashes each year.

Here are some tips you’ll want to follow the next time you’re caught driving in the rain.

Safety starts before you drive, and your goal should be to see and be seen. Replace windshield wiper inserts that leave streaks or don’t clear the glass in a single swipe. Make sure all headlights, taillights, brake lights and turn signals are properly functioning so other drivers will see you during downpours. Turn on your headlights whenever you drive.

Proper tire tread depth and inflation are imperative to maintaining good traction on wet roadways. Check tread depth with a quarter inserted upside down into the tire groove. If you can see above Washington’s head, start shopping for new tires. Check each tire’s pressure, including the spare, at least once a month... and be sure to check the pressure when the tires are cold.

**Avoid Cruise Control**

Most modern cars feature cruise control. This feature works great in dry conditions, but when used in wet conditions, the chance of losing control of the vehicle can increase. To prevent loss of traction, the driver may need to reduce the car’s speed by lifting off the accelerator, which cannot be accomplished when cruise control is engaged.

When driving in wet-weather conditions, it is important to concentrate fully on every aspect of driving. Avoiding cruise control will allow the driver more options to choose from when responding to a potential loss-of-traction situation, thus maximizing your safety.

**Slow Down and Leave Room**

Slowing down during wet weather driving can be critical to reducing a car’s chance of hydroplaning, when the tires rise up on a film of water. With as little as 1/12 inch of water on the road, tires have to displace a gallon of water per second to keep the rubber meeting the road. Drivers should reduce their speed to correspond to the amount of water on the roadway. At speeds as low as 35 mph, new tires can still lose some contact with the roadway.

To reduce chances of hydroplaning, drivers should slow down, avoid hard braking or turning sharply and drive in the tracks of the vehicle ahead of you. Also, it’s important for motorists to allow ample stopping distance between cars by increasing the following distance of the vehicle in front of them and beginning to slow down to stop for intersections, turns and other traffic early.

**Responding to a Skid**

Even careful drivers can experience skids. If a driver feels their car begin to skid, it’s important to not panic and follow these basic steps:

- Continue to look and steer in the direction in which the driver wants the car to go.
- Avoid slamming on the brakes as this will further upset the vehicle’s balance and make it harder to control.

If you feel the car begin to skid, continue to look and steer in the direction you want the car to go. Don’t panic, and avoid slamming on the brakes to maintain control.

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**VOLUNTEER OPPORTUNITIES...**

**DO EXIST WITH THE SACRAMENTO CHAPTER OF THE IIA!**

Email IIASacramento@gmail.com or myself, if interested in volunteering. Volunteering and...
Internal Auditors – 2 Positions Available
Sacramento, California

In these roles, you will perform various internal audit projects in accordance with the Company’s internal audit plan. Engagements are risk-based (not recurring, rotational projects) and include Operational, Financial, Compliance, Advisory, and Investigative examinations. Typical duties:

- Assist in the development of the internal audit program, perform assigned audit procedures, and draft internal audit reports under the supervision of the Senior Manager of Internal Audit.
- Build management relationships by demonstrating professionalism, a facilitative communication style and constructive responses to auditee needs.
- Establish and maintain good auditee relations during all audit engagements by identifying the expectations of the auditee and taking actions to support the auditee through the experience.
- Work both independently and with various cross-functional teams to manage audit projects including projects with resources from our co-source partner.
- Support recruiting activities.

Positions require a Bachelor’s degree in Accounting, Finance or related discipline and at least 3 years of related experience (or an equivalent combination of education and experience). Strong financial accounting and internal control background expected. Requires domestic travel of 10-20% annually to perform audits. US Citizenship required. Must be able to obtain and maintain a U.S. Security Clearance at the appropriate level (U.S. Citizenship required). Must also be able to satisfy federal government requirements for access to government information, and having dual citizenship may preclude you from being able to meet this requirement.

Desired Qualifications:
- Professional certification, such as CPA, CIA strongly preferred. MBA desired.
- Audit experience within a manufacturing, aerospace or government contracting environment.
- Cost accounting experience and/or experience working at a large auditing firm.

Visit our web site to apply online (look for job ID 12595 or 13065):

www.rocket.com/careers

In addition to medical/dental/vision insurance, our benefits include a 401(k) with company match, tuition reimbursement, vacation, sick leave, year-end shut down and more.

Aerojet Rocketdyne is an Equal Opportunity Employer. Minorities, Women, Veterans & Individuals with Disabilities are encouraged to apply.
5 Strategies for Creating a Winning Staffing Management Game Plan (#1)

“The responsibility for the success of the team starts with the coach, who develops the plan that is then executed by the players — who are extremely well-prepared.”

In a 1993 interview with the Harvard Business Review (HBR), former San Francisco 49ers head coach Bill Walsh was asked how he achieved “quickness and responsiveness” in his teams. The quote above was just part of his response. But it is a significant statement. As the HBR article notes, Walsh’s focus on developing “long-range strategic and personnel plans” for the 49ers from the moment he joined the organization in 1979 helped him create a powerhouse team that won three Super Bowl titles during his tenure.

Building an all-star finance and accounting team for your business also requires a solid game plan. With a well-thought-out staffing management strategy, you can complement the abilities of your current MVPs, and give them the support they need to deliver their best performance. You can also identify and address skills gaps that could undermine your finance function’s ability to meet critical deadlines, keep clients satisfied and generate new business.

When developing his personnel strategy, Walsh, according to HBR, “focused on what other coaches had considered the minutiae of the game: minute-by-minute choreographing of practices, breaking down individual and group tactics into parts, and defining responsibilities and setting objectives for both players and coaches.” You may not need to get this detailed when creating a game plan for your accounting and finance organization (although it can’t hurt!). But do consider applying the following five strategies as part of your process:

**Strategy #1. Conduct a talent audit**
Step back and assess your current team members to determine their strengths. Don’t just consider technical skills. Think about your employees’ interpersonal abilities and leadership potential, too. Public speaking skills, business acumen and effectiveness in collaborating with people inside and outside of your department are all qualities that deepen your finance function’s bench strength. A thorough assessment of each player’s talents can also help to inform your succession planning efforts for your organization.

**Strategy #2. Identify critical gaps in your roster**
Once you fully gauge your existing staff’s abilities, think about what roles and skills you’d need to recruit to create a high-performing and well-balanced “dream team” for your finance function. To fill critical gaps, would you need to hire more full-time staff? Could you train and develop promising employees? Or would it be better to engage specialists and experienced consultants? Depending on the needs of your business, you may find you need to employ all the above staffing strategies. (See Strategy #4.)
Strategy #3. Determine how long you will need certain skills
Your staffing management strategy should be designed to be flexible. It must stretch and contract with ease and speed as workload demands fluctuate. That’s why it’s important to differentiate between project-based and ongoing needs when creating your game plan. For example, if your firm pursues a merger or acquisition, or an IPO, you might need to hire specialized consultants to help guide the business successfully through these big change events. On the other hand, entering a new market or taking on a major new account might require you to expand your roster of full-time accounting and finance employees.

Strategy #4. Know how to compete for top talent
When you extend job offers to in-demand candidates, start with salaries that are at or above market rates — and be prepared to negotiate if needed. (You can use our Salary Calculator to quickly determine compensation ranges in your market for accounting and finance roles you’re trying to fill.) Your game plan for recruiting top players should also include publicizing the compelling perks your company offers, such as a work-life balance program.

Strategy #5. Keep top performers from jumping ship
Savvy managers know they need to put as much effort into retaining top players as they do to recruit them. So, your staffing management strategy should include tactics for keeping MVPs motivated to stay with your organization for the long term. Clearly mapping milestones for career achievement and offering professional development opportunities are just some ways to keep your employees engaged and satisfied on the job.

Creating a winning staffing management game plan for your accounting and finance team requires a lot of careful thought. Even then, there’s no guarantee that every staffing decision you make will be the right one. You’ll also need to adjust your strategy over time, as your organization changes and faces new challenges. But having a plan is better than no plan at all.

As Coach Walsh told HBR in 1993, “You need to have a plan even for the worst scenario. It doesn’t mean that it will always work; it doesn’t mean that you will always be successful. But you will always be prepared and at your best.”

This article is provided courtesy of Robert Half Management Resources, the premier provider of senior-level accounting, finance and business systems professionals to supplement companies’ project and interim staffing needs. The company has more than 140 locations worldwide and offers online job search services at www.roberthalfmr.com. Follow our blog at www.roberthalf.com/blog.
7 Ways to Support Employees’ Career Advancement (#2)

Many businesses today recognize the need to put employees’ professional development at the heart of company policy. Why? Their workers are demanding it. Talented professionals want to work for a company that will help them build and advance in their career.

However, finance leaders may not be doing enough to make these efforts a high priority. In a recent survey by Robert Half Management Resources, about one-fifth of workers (21 percent) polled said they have little or no confidence in senior management’s ability to support their personal growth and career advancement.

In this tight hiring market for skilled financial talent, finance leaders can’t afford to overlook the importance of supporting their employees’ career advancement. Here are seven ways to show your workers that the firm — and their boss — are committed to helping them grow professionally:

1. Take a personal interest
Make time to meet regularly with team members on a one-to-one basis to learn about their aspirations, expectations and frustrations. This outreach can help make your staff feel valued and lead to greater productivity and loyalty.

Also, help your employees to plot a career path within the company, so they can better visualize their future at your firm. Identify specific milestones for achievement, and the supporting resources employees will likely need to tap along their journey. Clear and consistent communication about career advancement opportunities can help workers feel more engaged and empowered.

2. Focus on learning
Continued job training and education are important to an employee’s professional development. Millennial workers, in particular, tend to covet these learning opportunities. Ensure that courses and workshops paid for by the company are part of their career plan.

In addition to nurturing individual needs and specific skills, help employees keep up with what's happening in the wider industry. One cost-effective method is to host monthly lunchtime sessions with guest speakers on relevant topics, such as cloud technology or tax legislation changes. Also, reward top talent by sending them to industry conferences where they can learn and network.

3. Rotate employee roles
The human brain thrives on variety, and job rotation is a smart way to shake up your workers’ daily routine. Encourage staff to work in different but related departments or positions. (A job rotation program can help to facilitate this.) These opportunities will help them to gain new skills, more appreciation of their colleagues’ duties and a better understanding of the business. Meanwhile, the company, and you, will benefit from having a more motivated, informed and well-rounded accounting and finance team.
4. Encourage mentoring
Establishing a formal mentoring program might be one of the smartest moves a company can make for itself as well as for its workers’ personal and career growth.

Though often seen as a transfer of knowledge from veteran employees to the less experienced, mentoring works both ways. While senior staff members can offer hard-earned insights and professional guidance to their junior colleagues, they also can benefit from the fresh perspectives and technological know-how of younger generations in the workforce.

5. Support work-life balance
Hard work is a prerequisite for career advancement, but that doesn’t necessarily mean regularly putting in 10-12 hours a day. Encourage your employees to work smart, maximize their efficiency, and leave time and energy for interests outside of work.

Take a proactive approach to your team’s well-being rather than waiting for problems like stress and burnout to bubble up. Embracing flexible policies that are designed to enhance work-life balance can make a huge difference to staff morale. It helps employees find the time to do their work, enjoy their life outside of the office, and take advantage of available professional development opportunities.

6. Paint the big picture
Reminding employees of their unique contributions to the company’s mission adds meaning to their role and can increase their motivation to expand their responsibilities and advance at the firm.

Don’t assume they already know how their work adds value, however. A recent survey by our company found that more than half of professionals (53 percent) wish they had more insight on how their day-to-day duties make a difference to the organization. So, be sure to provide regular updates about the organization’s progress toward key objectives, and also praise and reward employees for specific achievements that help drive the business toward those goals.

7. Create a succession planning program
Succession planning demonstrates to valued staff members that you not only want to invest in their professional development but also see them evolve into future leaders at the firm. That is a powerful message. So, don’t push this important process to the back burner. Create a succession plan for every key position in your organization. It can help motivate employees to learn the skills and knowledge needed for career advancement. (Plus, it’s a best practice for any business.)

If your workers are not achieving their potential because they feel overlooked, prioritizing their professional development and career advancement is an obvious solution. Make a clear effort to cultivate a growth environment for your workers. It’s an investment that can deliver huge returns for your staff and your business.
The Work-Life Balance To-Do List for Accounting and Finance Leaders (#3)

An employee’s ability to maintain a healthy work-life balance can have a direct and positive impact on that person’s productivity and job satisfaction. It also can help motivate that professional to stay with their current organization for the long term.

Findings from a recent Robert Half Management Resources survey suggest that many managers understand the importance of helping their employees achieve better work-life balance. More than half (52 percent) of workers interviewed said they are better able to juggle personal and professional responsibilities today than three years ago. And a strong majority of the respondents — 91 percent — report that their supervisor supports those efforts.

However, even if you are confident that you already do a good job helping your accounting and finance team to strike the right balance between their professional and personal responsibilities and interests, there’s likely room for improvement. The following to-do list can help you ensure that work-life balance is a top focus for your business in the year ahead:

**To-do #1: Ask for feedback**
If you want to better understand your employees’ wants and needs, just ask them. If some team members don’t feel comfortable opening up to their supervisor, use a questionnaire with the option to remain anonymous. The more you know about what your employees require for better work-life balance, the more you can help.

**To-do #2: Reach out to tenured staff**
If you manage a multigenerational team, you may find that employees from different age demographics feel differently about their ability to maintain work-life balance. For example, in our recent survey, twice as many millennial respondents cited improvement in their work-life balance compared to those age 55 and up.

So, if you have baby boomer team members, you may want to proactively suggest ways that they can achieve better balance. Perhaps they’d benefit from a sabbatical? Or maybe they’d like to gradually cut back their hours and move into a consulting role as they transition into retirement?

**To-do #3: Emphasize outcomes, not hours**
When employees put in long hours and sacrifice personal time, you may be tempted to lavish them with praise and even a bonus. Well-intended as these gestures are, they can be counterproductive, as you’re rewarding effort and not necessarily results. Instead, save the accolades and incentives for outcomes, and be quick to recognize staff members who meet their goals through strong technical and time management skills.

**To-do #4: Lead by example**
When you email your accounting and finance team on a Sunday or late at night for non-urgent matters, you’re also sending an unspoken message: *I’m working on the weekend, and you should, too.* No matter how much you talk up the importance of work-life balance, it does no good when
The same goes for vacations. If you’re plugged into work when you’re supposed to be relaxing, your staff will feel pressured to follow suit during their vacations.

**To-do #5: Urge workers to use their paid time off**
Speaking of vacations … some companies still allow their employees to roll over and stockpile their vacation days. That policy may seem like a benefit, but it does your team a disservice. Accounting and finance staff really do need to check out from work periodically. Otherwise, they risk burning out — and you risk losing top performers.

**To-do #6: Bring in interim professionals**
Not all workweeks are created equal. Year-end, tax season and reporting deadlines can easily overload accounting and finance employees and throw their work-life balance out of whack. One way to support your full-time staff during these stressful work periods is to engage interim professionals who can lend a helping hand.

**To-do #7: Give the gift of time**
Gifts of time, like an extra vacation day or a Friday afternoon off following a big project or heavy work period, can also help your team to maintain better work-life balance. (No doubt, your workers will greatly appreciate these small but valuable "bonuses."))

And don’t forget about the holiday season. If your company experiences a natural slowdown between Christmas and New Year’s Day, consider closing the office that entire week. That way your team can fully unplug from work, enjoy the holidays, and come back to work feeling recharged and refreshed.

**To-do #8: Communicate and educate**
Don’t let “work-life balance” be little more than a buzz phrase at your firm. Find other ways, big and small, to demonstrate to employees that the business takes this issue seriously. Some ideas include:

- Promoting your company’s work-life balance perks in memos and newsletters.
- Offering resources to help new parents before and after their leave.
- Setting up brown-bag lunch sessions to discuss time management and wellness. If your budget allows, consider inviting expert speakers to present on these topics.
- Maintaining an open-door policy so workers feel free to discuss work-life balance issues with you.

These eight to-dos can help you keep your accounting and finance team’s morale and job satisfaction running high. You can foster a corporate culture where work-life balance is a clear priority — and employees know they have management’s full support to achieve it.

*This article is provided courtesy of Robert Half Management Resources, the premier provider of senior-level accounting, finance and business systems professionals to supplement companies’ project and interim staffing needs. The company has more than 140 locations worldwide and offers online job search services at www.roberthalfmr.com. Follow our blog at*.  
IT ALL STARTS WITH A HANDSHAKE…

...an event by our IIA RENO CHAPTER on January 26, 2018

Registration for IIA–Northern Nevada Chapter’s Interviewing – It All Starts with a Handshake event, scheduled for 11:30 am on Friday, January 26, 2018, is now open.

We are bringing in a new presenter for the kick-off of 2018’s CPE offerings. With 35+ years experience in Forensic Accounting and Law Enforcement, there will be significant industry knowledge from the speaker (see bio below).

Interviewing people is an art. In most organizations and colleges, interviewing is not something that is taught. In many cases, interviewing is not even discussed. Audit and accounting professionals are often thrown into the fire by having to interview clients on many different aspects and have no idea how an interview should be handled. Many people believe that simply asking questions on a check list is an interview; it is not.

By understanding that the interview actually starts at the moment the handshake takes place, gives the attendee an understanding how to then move forward on the interview and how their interaction with the individual might go.

**Location:**
IGT Training Room,

**Time:**
11:30 am - 1:30 pm

**Speaker:**
Doug Cash, MBA, CFE, CFI, CFCI - Manager-Forensic & Valuation Services, Eide Bailly LLP

**Instructional delivery method:** Live Group

**Field of Study:** Auditing

**CPE credit(s):** 2.0 hour(s)

**Course registration requirements:** To register for this event [https://eiseverywhere.com/301237](https://eiseverywhere.com/301237)

If you have any questions, you may contact Chapter Leadership at IIANorthernNevada@gmail.com.

**Speaker Bio:**
Over the past 35 (plus) years (10 years as a Forensic Accountant and 27 years in Law Enforcement) I have assisted businesses, individuals and governmental organizations with fraud detection and fraud prevention services. These services have included embezzlements, partner disputes, divorce matters, internal control examinations, internal investigations, employee interviews, deposition preparation, training, case consultation as well as expert witness engagements.

In 2007, I joined Eide Bailly Forensic Accounting & Valuation Services to assist businesses, organizations and individuals (clients as well as non-clients) in dealing with various types of fraudulent activity.

During my time as a detective, my emphasis was in white collar crime investigations. Upon my retirement from law enforcement, I conducted credit card fraud investigations as well as anti-money laundering and terrorist financing investigations for JP Morgan Chase Bank. I also conducted various types of investigations dealing with various forms of potential insurance fraud as a Special Agent for the State of Arizona, Department of Insurance, Fraud Unit.

I continue to strive in assisting businesses and/or individuals to protect themselves from fraud related activities, as well as using my expertise in the fraud world to hold people accountable for their actions, whether the incident being considered is a criminal or civil matter.

**SPECIALTIES:**
Embezzlement investigations, partner disputes, litigation support for divorce matters, fraud detection, fraud prevention (i.e. internal control examinations & internal investigation assistance), law enforcement liaison, interview training, deception identification, and public speaking on fraud related matters.
Picture Gallery: December 7, 2017
Program: Top 10 Soft Skills Needed for Success
Location: Holiday Inn Express Cal Expo
2224 Auburn Blvd, Sacramento, CA 95821
Picture Gallery: November 30, 2017
Seminar: Critical Communication Skills for Effective Auditors: Data Collection Interviewing, Overcoming Client Objections, and Negotiation
Location: DoubleTree Suites by Hilton Sacramento-Rancho Cordova
11260 Point East Drive, Rancho Cordova, CA 95742