

Interoffice Communication

Date: May 20, 2021
To: Operations and Finance Divisional Staff
From: Pam Cain, Senior Vice President for Operations and Finance
Subject: Leadership Retirement and Division Reassignments

Joan Piscitello, Associate Vice President for Central Finance and Treasurer, will retire on June 30, 2021. Joan's many significant contributions to the university over 33 years have positioned us for a positive future. In addition to her vital Treasurer/Receivables role, Joan in recent years took on several other major leadership roles within our division, including Controller's Office, Procurement Services, and Workday Finance Business Analysts.

Please join me in expressing our sincere appreciation for everything Joan has done for Iowa State University. We will celebrate her and her accomplishments on Tuesday afternoon, June 29.

Joan's retirement provides an opportunity for us to again evaluate our overall structure and workload of finance units within our division. It's an opportunity to build on the division restructuring of several years ago that included Finance Delivery.

After careful consideration, with valuable input from many campus and division leaders, we will be reassigning the responsibilities of Joan's position to four other finance leaders, effective July 1, 2021. The changes are summarized here, and a revised division organizational chart is attached for reference:

- Heather Paris, Associate Vice President for Finance and Support Services, will take on responsibilities for the Central Finance operations (Controller's Office, Procurement, and Accounts Receivable) to provide more synergies and coordination for the financial functions, including finance delivery.
- Bonnie Whalen, Associate Vice President for Institutional Financial Strategy, will oversee the Treasury functions (investments, borrowing/bonding, cash flow, etc.) along with her current responsibilities for budget development and institutional financial analyses.

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- Tim Ashley, Interim Assistant Vice President for Payroll, Tax, and Benefits will be responsible for tax-related items currently in Accounts Receivable and the Controller's Office, in addition to his current tax oversight. These duties align with his other duties for payroll operations, fringe benefits accounting and compliance, and health insurance administration.
- Jake Wilson, Director of Divisional Business Operations, will oversee the Workday Business Analysts who focus on specific functions within Workday. Aligning these responsibilities with other divisional fiscal and strategic business planning will help to attain a consistent perspective to all Workday Finance functions (finance, payroll and planning).

I thank Heather, Bonnie, Tim, and Jake for their commitment to move us forward to even more effective and efficient fiscal responsibility, a heightened sense of stewardship for all our resources, and strengthened accountability necessary to achieve our university priorities.

To this end, these four finance leaders will share leadership responsibilities for the newly established Finance Leaders Alliance Group (FLAG), which will coordinate and focus financial policies, procedures, functions, and strategies.

Thank you for your support as we make these important transitions. Please do not hesitate to reach out to me with any questions you may have.

Once again, let's plan to celebrate Joan Piscitello's many years of dedicated service to Iowa State, and also join me in providing encouragement and support to Heather, Bonnie, Tim and Jake in the coming weeks and months.

cc: Administrative Officers