



UIC UNIVERSITY OF ILLINOIS
AT CHICAGO



Developing Professional Excellence

2ND ANNUAL

BRINGING ADMINISTRATORS TOGETHER CONFERENCE

MARCH 6 & 7, 2008

UIC FORUM

**2nd Annual UIC Bringing Administrators Together Conference:
*Developing Professional Excellence***

March 6 & 7, 2008

UIC Forum

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I. ABOUT THE CONFERENCE

We have an exciting conference planned for you. We changed the name of this second annual conference to “Bringing Administrators Together” because that is what this event is mainly about. This year’s theme, and motive for bringing you together, is “Developing Professional Excellence”.

We define professional excellence as the following:

- being proactive through forecasting and planning versus being reactive;
- being open to different ways of doing business and developing creative solutions to business problems;
- breaking down silos and establishing connections across disciplines;
- seeing the big picture and understanding one’s contribution to it;
- networking and collaborating both within one’s department, as well as with other departments and units;
- actively developing one’s professional career and the careers of staff members; and,
- having a firm understanding of the UIC environment – being aware of changes that significantly impact the University and implementing goals that support the UIC strategic plan.

You will hopefully see these elements of professional excellence reflected in the plenary and workshop sessions offered at this year’s conference. In addition, we hope that those of you who attended last year’s conference will see that we have attempted to make some of the improvements suggested to us via the conference evaluation form and informal verbal feedback. For example, a large number of participants noted that they would like to see more advanced/high level workshops, found networking to be one of the most valuable aspects of the conference, and were somewhat confused about the purpose and logistics of the “hot topics” session. For this year’s conference, we believe we have “upped” the level of the workshops so that they are not just training sessions, replaced the “hot topics” session with an “ask the experts” session (see the Program Schedule on page 5 for a description), and added a networking social event.

We encourage you to step outside your daily roles and take advantage of these opportunities to learn about other areas. We also encourage you to please take the time at the end of each workshop and at the end of the conference to complete the evaluations so that your feedback may further strengthen future conferences. Lastly, we hope you enjoy the conference!

– *Conference Planning Team*

CONFERENCE SPONSORS

R. Michael Tanner, Provost and Vice Chancellor for Academic Affairs
Larry Danziger, Interim Vice Chancellor for Research
Heather Haberaecker, Executive Assistant Vice President for Business & Finance
John Loya, Vice Chancellor for Human Resources

CONFERENCE PLANNING TEAM

Jacqueline Berger, OVCR, Communications Coordinator
Elizabeth Budzik, SPH, Asst. to the Director of the Div. of Epidemiology and Biostatistics
Jackie Finch, SPH, Director of Finance
Marelet Kirda, OVCR, Assistant to the Vice Chancellor for Research
Kim Laczynski, OBFS, Assistant Director for Change Management
Mary Malcolm, OBFS, Assistant Director for Technical Training
Michael Moss, OBFS, Senior Coordinator of Business and Financial Services

Courtney Parzych, OBFS, Assistant Director of Business and Finance
Julius Rhodes, HR, Interim Director of Organizational Effectiveness
Karen Sholeen, LAS, Assistant Dean
Bil Susinka, VCAA, Executive Assistant to the Provost
David Turkington, OVCR, Project Coordinator for the National Center for Data Mining

REGISTRATION

There are no registration fees for this conference. However, you must register your preference for each workshop session you plan on attending as well as your lunch choice for day one. The registration deadline is **Friday, February 22nd at 5 pm**. Please visit the [conference website](#) to register.

DIRECTIONS & PARKING

The UIC Forum is located at 725 West Roosevelt Road (on the corner of Roosevelt Road and Halsted Street). The campus shuttle and the CTA #8 South Halsted Bus provide service to the UIC Forum.

Driving directions are as follows:

From the north/O'Hare Airport: Take the Kennedy Expressway (I-90 E). Take the Taylor Street exit 52A toward Roosevelt Road. Stay straight to go onto South Union Avenue. Turn right onto Roosevelt Road.

From the west: Take the Eisenhower Expressway (I-290 E). Take the Ryan Expy/I-90 E/I-94 E exit toward Indiana. Take the Taylor Street exit 52A toward Roosevelt Road. Stay straight to go onto South Union Avenue. Turn right on Roosevelt Road.

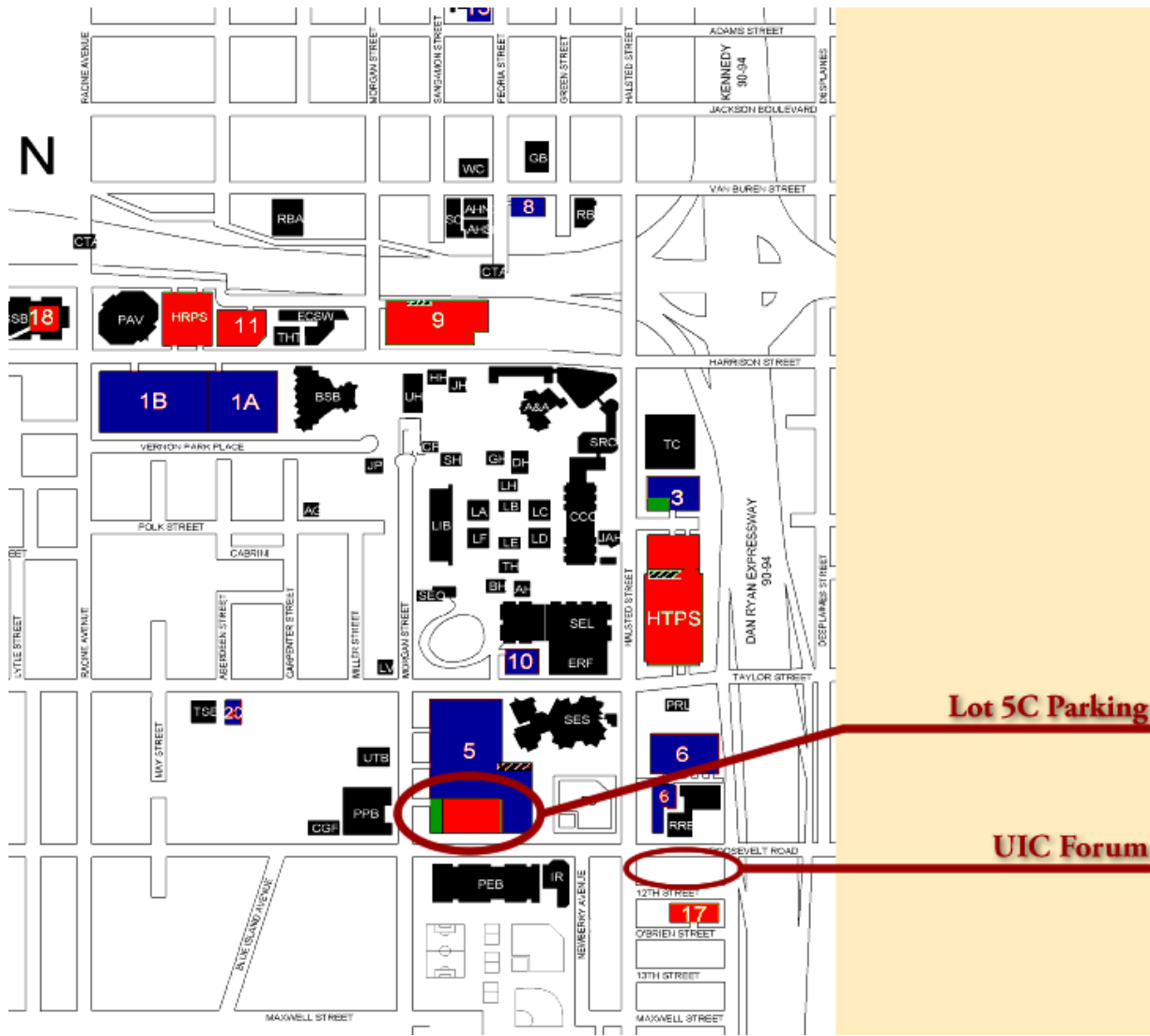
From the east: US – 41S/Edens Expressway becomes I-94 E. Merge onto I-90 E/I-94 E. Take the Taylor Street exit 52A toward Roosevelt Road. Stay straight to go onto South Union Avenue. Turn right on Roosevelt Road.

From the south: Take the Dan Ryan Expressway (I-94 W). Take Exit 52B toward Roosevelt Road/Taylor Street. Stay straight to go onto Ruble Street. Turn left onto West Roosevelt Road.

The main parking lot for the UIC Forum is Lot 5C (located at 1135 South Morgan St. on the corner of Morgan & Roosevelt). In order to receive free relocation, will need to present your current parking hang tag to the cashier upon exit. For those who do not have a valid UIC parking assignment, there will be a fee to park.

See the following page for a map of the parking lots.

MAP



























II. PROGRAM SCHEDULE AT A GLANCE





Thursday, March 6, 2008		
8:00 AM - 9:00 AM	Check In & Light Breakfast	Atrium
9:00 AM - 10:30 AM	Opening Remarks & Provost Tanner's Presentation on the State of the Campus <i>In his presentation, Provost Tanner will speak about the major issues currently impacting UIC and some of the key initiatives going on that are helping UIC meet its strategic goals.</i>	Main Hall
10:30 AM - 10:45 AM	Break	
10:45 AM - 12:00 PM	Workshop Breakout Session 1:	
	- New and Upcoming Business & Finance Policy Changes: Cell Phones, Internet, P-Card and More	Room D
	- The Big Picture: Resource Allocation at UIC	Room E
	- Grad Students as Employees and the GEO Collective Bargaining Agreement	Room F
	- Demystifying the Institutional Review Board (IRB) Process	Room G
	- A Day in the Life of a Business Manager Using Banner	Room H
	- Addressing Conflict and Managing Stress in the Workplace	Room I
12:00 PM - 1:00 PM	Lunch & Conference Sponsors' Presentation on Key Issues/Organizational Changes <i>During lunch, Vice Chancellor for HR John Loya, Interim Vice Chancellor for Research Larry Danziger and Executive Assistant Vice President for Business & Finance Heather Haberaecker will each give a brief presentation on the key issues impacting their areas as well as recent organizational changes.</i>	Main Hall
1:00 PM - 2:00 PM	Ask the Experts Session <i>This session will provide you with an opportunity to speak with subject matter experts from various UIC support units face-to-face in order to get certain questions answered, learn more about a unit, share concerns and ideas, and/or simply to meet individuals you normally communicate with via phone or email. More information about this session, such as the units that will be present, will be forthcoming.</i>	Main Hall
2:00 PM - 2:15 PM	Break	
2:15 PM - 3:30 PM	Workshop Breakout Session 2:	
	- Current Issues in Accounting	Room D
	- Indirect Cost Recovery Revenue Distribution at UIC	Room E
	- Staff Disciplinary and Non-Reappointment Considerations	Room F
	- The Recruitment and Payment of Human Subjects	Room G
	- Information Solutions for the Smaller Unit	Room H
	- Developing New Academic Programs	Room I
3:30 PM - 5:00 PM	Networking Social <i>A primary purpose of this conference is to "bring administrators together" and the Networking Social is your opportunity to mingle with colleagues from across the University. Light hors d'oeuvres and beer/wine/soda will be provided.</i>	Main Hall

Friday, March 7, 2008		
8:00 AM - 9:00 AM	Check In & Light Breakfast	Atrium
9:00 AM - 10:15 AM	Opening Remarks & President White's Presentation on Leadership <i>In his book, The Nature of Leadership: Reptiles, Mammals, and the Challenge of Becoming a Great Leader, President White discusses the sometimes reptilian and sometimes mammalian characteristics of good leaders. In his presentation, President White will discuss what it means to be a leader at the University of Illinois.</i>	Main Hall
10:15 AM - 10:30 AM	Break	
10:30 AM - 11:45 AM	Workshop Breakout Session 3:	
	- Internal Controls You Can Implement to Protect Your Department and Mitigate Risks	Room D
	- Case Studies in Financial Planning: Assessing Program Viability	Room E
	- Addressing Compensation Strategies and Pay Administration at UIC	Room F
	- The Life of an Award: Pre to Post Award Practices & Pitfalls - PART 1	Room G
	- Best Options for Expense Reporting in the Data Warehouse	Room H
	- Helping Your Department Head and Faculty Manage Conflict of Interest Issues	Room I
11:45 AM - 12:00 PM	Break (a light snack will be provided)	Main Hall
12:00 PM - 1:15 PM	Workshop Breakout Session 4:	
	- Purchasing Contracts: The Importance of a Well-Defined Scope of Services	Room D
	- Solutions to Common Payroll Problems	Room E
	- The Faculty Search and Appointment Process	Room F
	- The Life of an Award: Pre to Post Award Practices & Pitfalls - PART 2	Room G
	- Strategies for Managing Projects	Room H
	- Bridging the Finance-Human Resources Communications Gap	Room I

III. WORKSHOP GRID

The purpose of this grid is to give you an overview of all the workshops being offered at the conference and to assist you in deciding which ones to attend. The icons are there to depict the type/level of content that will be presented in each workshop. These workshops are not meant to be training sessions. Therefore, we encourage you to broaden your horizons and explore topic areas you don't necessarily deal with on a day-to-day basis.

WORKSHOP TITLES						
Session 1 Thursday 10:45 - 12:00	New and Upcoming Business & Finance Policy Changes: Cell Phones, Internet, P-Card and More 	The Big Picture: Resource Allocation at UIC 	Grad Students as Employees and the GEO Collective Bargaining Agreement 	Demystifying the Institutional Review Board (IRB) Process 	A Day in the Life of a Business Manager Using Banner 	Addressing Conflict and Managing Stress in the Workplace 
Session 2 Thursday 2:15 - 3:30	Current Issues in Accounting 	Indirect Cost Recovery Revenue Distribution at UIC 	Staff Disciplinary and Non-Reappointment Considerations 	The Recruitment and Payment of Human Subjects 	Information Solutions for the Smaller Unit 	Developing New Academic Programs 
Session 3 Friday 10:30 - 11:45	Internal Controls You Can Implement to Protect Your Department and Mitigate Risks 	Case Studies in Financial Planning: Assessing Program Viability 	Addressing Compensation Strategies and Pay Administration at UIC 	The Life of an Award: Pre to Post Award Practices & Pitfalls PART 1 	Best Options for Expense Reporting in the Data Warehouse 	Helping Your Department Head and Faculty Manage Conflict of Interest Issues 
Session 4 Friday 12:00 - 1:15	Purchasing Contracts: The Importance of a Well-Defined Scope of Services 	Solutions to Common Payroll Problems 	The Faculty Search and Appointment Process 	The Life of an Award: Pre to Post Award Practices & Pitfalls PART 2 	Strategies for Managing Projects 	Bridging the Finance-Human Resources Communications Gap 

LEGEND:	
	Process / Policy / Departmental Overview
	Tips & Tools / Best Practices / Creative Solutions
	Policy / Procedure Instructions
	Big Picture

IV. WORKSHOP DESCRIPTIONS

SESSION 1: THURSDAY, MARCH 6, 2008 FROM 10:45 TO 12:00

NEW AND UPCOMING BUSINESS & FINANCE POLICY CHANGES: CELL PHONES, INTERNET, P-CARD AND MORE

Presented by: Sandra Ehler, Executive Director, University Payables
Terry Thompson, Director, University Tax
Stephen Wiggs, Director, Corporate Card Operations

Audience: Business Managers of units that provide cell phones or reimbursements to employees; P-Card users and administrators

Description: This workshop will present the new cell phone/PDA/Internet policy. The benefits of the stipend program versus the labor intensive documentation processes required of reimbursements/University-provided phones will be thoroughly discussed. In addition, an overview of the recent changes to the University's P-Card program and the FY07 audit results will be given. Specific areas to be covered will be recent changes to OBFS Policies & Procedures - Section 7.6, the University P-Card, and the successful implementation of the self-paced on-line P-Card training.

THE BIG PICTURE: RESOURCE ALLOCATION AT UIC

Presented by: Frank Goldberg, Vice Provost for Resource Planning & Management

Audience: Anyone wishing an overview of the financial picture for UIC

Description: This session will cover the condition of the national and state economies as they affect UIC, the condition of and trends in the higher education industry generally, the State funding environment, cost drivers on the campus, how the campus determines what resources are available, where they go, and how those allocation decisions are made.

GRAD STUDENTS AS EMPLOYEES AND THE GEO COLLECTIVE BARGAINING AGREEMENT

Presented by: Tom Riley, Director, Labor & Employee Relations
Amy Levant, Associate Dean for Administration, Graduate College

Audience: Administrators within units employing Graduate Assistants (GAs) and Teaching Assistants (TAs)

Description: The collective bargaining agreement between the University and the Graduate Employees' Organization covering TAs and GAs at UIC is the largest and newest bargaining unit on campus, and one that impacts almost every department. This presentation will cover the history of how the assistants unionized, the bargaining of the first contract, and the substance, procedures and practical tips relegated to the provisions of the new collective bargaining agreement. In addition, participants will receive information regarding resources available to address relevant issues.

DEMYSTIFYING THE INSTITUTIONAL REVIEW BOARD (IRB) PROCESS

Presented by: Cynthia Tom-Klebba, Associate Director, Office for the Protection of Research Subjects
Teresa Johnston, Assistant Director, IRB #1

Audience: Administrators involved in the IRB process

Description: This is a presentation for individuals involved in the IRB process - not on the level of an investigator, but on the administrative level - preparing the applications, tracking protocols, and managing the documents for the investigator. The IRB process is not complicated; our goal is to clarify the process and the elements involved and create a basic level of understanding in managing IRB protocols.

A DAY IN THE LIFE OF A BUSINESS MANAGER USING BANNER

Presented by: Bill Schmilke, Assistant to the Head, Department of Chemical Engineering

Audience: Banner users who would like information about useful Banner forms

Description: We will demonstrate commonly used Banner forms from the Finance, HR/Payroll and Student modules and how they can help you in your daily business operations. Participants are encouraged to e-mail the presenter (Bill Schmilke at schmilke@uic.edu) by February 12, with questions that they would like to have addressed during the workshop.

ADDRESSING CONFLICT AND MANAGING STRESS IN THE WORKPLACE

Presented by: Julius Rhodes, Interim Director, Organizational Effectiveness (HR)

Audience: Individuals who must work through others to resolve operational issues

Description: Conflict and stress in the workplace are natural and the ability to deal effectively with both is a requirement in today's organizational environment. This workshop will examine the root causes of conflict and stress and will provide practical strategies to minimize and overcome their existence.

CURRENT ISSUES IN ACCOUNTING

Presented by: **Sherri Faith**, Assistant Director, Accounting Information Management, University Accounting and Financial Reporting
John Laroe, Business and Financial Specialist, University Accounting and Financial Reporting
Roger Wade, Business and Financial Specialist, University Accounting and Financial Reporting
Denise Stanley, Director, University Property Accounting and Reporting, University Accounting and Financial Reporting

Audience: Business Managers and other personnel with fiscal responsibilities

Description: University Accounting staff members will share information on topics such as self-supporting issues, sales tax in fund raising efforts, gift policies, UBIT guidelines and recent property issues. A moderator will facilitate the discussion around the prepared topics and time will be allotted to address questions from the audience. Participants are encouraged to bring questions for the presenters.

INDIRECT COST RECOVERY REVENUE DISTRIBUTION AT UIC

Presented by: **Todd Van Neck**, Director, Budgeting & Program Analysis (VCAA)
Deborah Starks, Analyst, Budgeting & Program Analysis (VCAA)
Russ Bishop, Director, Budget & Financial Analysis (OBFS)
Mee Mee Lee-Choi, Associate Director, Grants & Contracts (OBFS)

Audience: Department Business Managers and College Fiscal Officers, and anyone with grants management responsibilities

Description: This workshop will cover distribution of the Indirect Cost Recovery (ICR) revenue, including how ICR funds are forecasted, budgeted, and allocated to units. It will deal with the PAF, which affects distribution of the original 30% of ICR distributed to units. It will also deal with the 20% more recently being distributed, which is done a different way. It will address the different distribution schemes used within the different colleges. It will also include a short discussion of how the Federal F&A rate is calculated and negotiated. Participants will leave with a detailed understanding of ICR distribution at UIC.

STAFF DISCIPLINARY AND NON-REAPPOINTMENT CONSIDERATIONS

Presented by: **Steve Holz**, Associate Director, Labor & Employee Relations
Mirta Mendez, Associate Director, Employment
Taycine McInnis, HR Assistant Manager, Labor & Employee Relations
Gladys Black, HR Assistant Manager, Employment

Audience: Supervisors, Managers, HR Administrators, and Department Heads

Description: This workshop will provide an overview of what you need to know when you have to discipline or let someone go. Different rules apply to Academic Professional employees than to Civil Service employees. All managers and supervisors should familiarize themselves with the rules affecting each type of employee. This presentation will address the nature, policies, and rules of those types of appointments, and policy and operational considerations for discipline, dismissals, job eliminations, and non-reappointments.

RECRUITMENT AND PAYMENT OF HUMAN SUBJECTS

Presented by: **Sandra Ehler**, Executive Director, University Payables
Sheila Williams, Supervisor, University Payables
Chuck Hoehne, Assistant Director, Office for the Protection of Research Subjects

Audience: Administrators within units that utilize human subjects in conducting various research studies

Description: This workshop will focus on the policy and procedures associated with paying Human Subjects for participation in research studies. The goal is to help the audience understand the rules and regulations associated with these payments in order to alleviate the confusion surrounding the process. In addition, information will be provided as to the procedures to be used when recruiting research subjects.

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INFORMATION SOLUTIONS FOR THE SMALLER UNIT

Presented by: **Mary Lelik**, Director of Institutional Research, Office of the Vice Provost for Resource Planning and Management
Ed Valentine, Coordinator, Business Systems User Service, Office of the Vice Provost for Resource Planning and Mgmt.

Audience: Assistant to Dean / Assistant to Department Heads of small or mid-sized units and those who work as the only Business Manager serving their unit

Description: In many small and mid-sized units, business staff persons are often responsible for retrieving and using data from a wide variety of functional areas. (For example, one could be responsible for monitoring most finance transactions, budget or HR and occasional student tasks.) This workshop focuses on tools for those with these "generalist" functions, typically with "Assistant to Dean/Head" titles or serving as the only Business Manager for a unit. The presentation will show resources, including Banner query forms, standard reports and highlighted resources in the Decision Support Solutions Library. Participants are encouraged to bring the references they find time-saving because the group discussion will include a sharing of end user-endorsed quick tips. This workshop also includes an overview by the Office of Institutional Research, which provides services that take data developed for campus-wide initiatives (revenue measurement or enrollment management) and makes that data usable for deans, department heads and their staff.

DEVELOPING NEW ACADEMIC PROGRAMS

Presented by: **Midge Grosch**, Director of Programs & Academic Assessment, Office of Planning & Programs
Kim Hubalik Neumann, Assistant Director for Academic Programs, Office of Planning & Programs
John Fyfe, Visiting Director of Program Management, Global Campus Initiative
Arkalgud Ramaprasad, Ph.D., Associate Vice Chancellor for Academic Affairs, Office of Graduate & Continuing Educ.
Nancy Van der Griend, Associate Director, Office of Student Systems Services

Audience: Department Business Managers and College Fiscal Officers, and anyone involved in the development of academic programs

Description: This session will cover the categorization of program proposals (e.g., what is a new program vs. expansion of existing), the submission of such proposals through Academic Affairs/Senate/Grad Exec Committee/BOT/IBHE, and will include a discussion of the financial info required for such proposals. This session will also cover the development of Global Campus programs, including 1) program definition and market assessment; 2) the UIC Campus/Global Campus agreement for program development and support; and 3) the administrative requirements for a successful implementation. Topics include marketing plans, budgeting and revenue sharing, staffing, online course development, academic approvals, admission requirements, course offerings, class schedules, instructor assignment, enrollment verification, degree audit, tuition assessment, financial aid, reporting, and other student services. The presentation will also review the Program Development Checklist developed by UIC's Student Systems Business Owners to help insure the coordination of the many, various UIC administrative activities required for successful Global Campus program implementation.

INTERNAL CONTROLS YOU CAN IMPLEMENT TO PROTECT YOUR DEPARTMENT AND MITIGATE RISKS

Presented by: Neal Crowley, Director, Office of University Audits at UIC

Audience: Administrators with responsibilities for business processes

Description: The workshop will detail the specific internal controls that various business processes management can implement contingent upon their resources. We will cover the internal controls that should be employed at all levels of the organization to provide management assurance for completeness in revenue, expenditures, gift administration, cash, accounts receivable, grants and contracts, P-Card, moveable equipment, personnel and payroll, information technology, inventory, purchasing, contracting, leasing, organization, management, budgeting, accounting, and reporting (OMBAR). Also, we will discuss the methods that management can employ to perform a risk assessment for their unit. We will present techniques that administrators can proactively employ to identify risks and create an action plan to mitigate the risks.

CASE STUDIES IN FINANCIAL PLANNING: ASSESSING FINANCIAL VIABILITY

Presented by: Cordelia Maloney, Director, Office of Continuing Education

Jim Carson, Administrative Director, Pathology Lab

Todd Van Neck, Director, Budgeting & Program Analysis (VCAA)

Audience: Anyone with responsibility for managing a program's finances

Description: As resources get tighter, units must rigorously evaluate the financial performance of their programs. New programs in particular must be financially self-supporting. This session will present case studies from various units that have recently launched new programs, or closed existing programs, and the analysis templates they used to assess each program's finances. Participants will learn how to develop a financial pro forma for break-even analysis.

ADDRESSING COMPENSATION STRATEGIES AND PAY ADMINISTRATION AT UIC

Presented by: Anniese Lemond, Director, Compensation

Audience: Managers and HR Administrators responsible for pay administration

Description: During this workshop, we will review the compensation philosophy and strategy. Participants will gain an introduction to base pay. The presentation will address strategic concepts associated with job analysis, documentation and evaluation, examine market-based and content-based job evaluations (quantitative and non-quantitative methods) and the role of the compensation professional.

THE LIFE OF AN AWARD: PRE TO POST AWARD PRACTICES & PITFALLS (PART 1)

Presented by: Vanessa Peoples, Director, Grants & Contracts

Luis Vargas, Executive Director, Office of Research Services

Mee Mee Lee Choi, Associate Director, Grants & Contracts

Fuller Lyons, Associate Director, Grants & Contracts

Amneh Kiswani, Assistant Director, Office of Research Services

Patti Pfister, Legal Coordinator & Interim Assistant Director, Office of Research Services

Audience: Business Managers and Research Administrators with a basic understanding of grants

Description: This is a two session collaborative effort between Grants & Contracts and the Office of Research Services to walk workshop participants through a complete cycle of the life of an award. We will incorporate frequently asked questions and potential problem areas for research administrators as we give an interactive overview of the process and potential pitfalls. ***Participants must attend both part 1 and part 2.***

BEST OPTIONS FOR EXPENSE REPORTING IN THE DATA WAREHOUSE

Presented by: Beth Ladd, Functional Area Coordinator - Finance, Decision Support

Mark Pollard, Functional Area Coordinator - Human Resources, Decision Support

Audience: Individuals such as Business Managers, Financial Managers, and Principal Investigators who have an interest in personnel and non-personnel expenditure reporting

Description: This workshop is intended for the Data Warehouse user who has written reports utilizing the Business Objects tool against two or more Finance and/or HR universes. We will compare and contrast existing expense reporting universes in the Data Warehouse. We will explain which universe is best for various reporting needs. Sample reports will be provided. Reporting samples may focus on Fund types to illustrate best practices. A variety of information from detailed transactions to summaries will be illustrated.

continued ...

HELPING YOUR DEPARTMENT HEAD AND FACULTY MANAGE CONFLICT OF INTEREST ISSUES

Presented by: **Rebecca Ann Lind, Ph.D.**, Assistant Vice Chancellor for Research, Office of the Vice Chancellor for Research

Audience: Individuals involved in the process of reviewing and managing financial conflicts of interest (COI) for their academic faculty or staff at the University

Description: This presentation and brainstorming workshop will explain how financial conflicts of interest (COI), whether “real,” “apparent,” “potential” or “perceived,” must be managed. Our goal is to help participants recognize the importance of disclosing and managing COI, as well as to provide participants with practical tips and tools on how to better coach their department heads and faculty on COI issues. We will consider conceptual/definitional issues and provide practical advice for efficiently and effectively managing conflicts. The presentation is geared towards creating a basic level of understanding and managing COI.

PURCHASING CONTRACTS: THE IMPORTANCE OF A WELL-DEFINED SCOPE OF SERVICES

Presented by: **Maria de Lourdes Coss**, Director, Purchasing
Patricia Kale, Director, Risk Management
John Alsterda, Associate University Counsel
Jamie Haberichter, Assistant University Counsel

Audience: Business Managers and personnel responsible for or regularly involved in the contracting process

Description: Many contracts rely upon separate scope of services or scope of work documents to define the goods and/or services that are being procured under the agreement. The scope of services is a critical contract component that is supposed to embody the parties' "meeting of the minds" as to the specific obligations of performance and delivery that each may expect from the other. All too often, however, the scope of services is treated like the forgotten child of the main contract document. Attendees will participate in a fun scope development exercise aimed at developing a comprehensive scope of services document from scratch and will benefit from a panel discussion addressing business considerations, legal ramifications, and risk assessment issues associated with the scope of services. We will also identify the important components to include in a scope of services document and discuss how a well-defined "scope of services" can help to reduce the timeframe for contract processing and approval.

SOLUTIONS TO COMMON PAYROLL PROBLEMS

Presented by: **Laurie Pitner**, Executive Director, University Payroll
Kassandra Hester, Associate Director, University Payroll
Laura Barnett, Assistant Director, University Payroll
Larry Hanyzewski, Assistant Director, University Payroll
Melvin Fason, Assistant Manager, University Payroll
Don Smith, Manager, University Payroll

Audience: Payroll Administrators

Description: Based on the results of a brief survey that University Payroll will distribute to conference invitees, a panel of Payroll subject matter experts will address the most common problems and issues identified. We will provide tips and tools on solutions and how to prevent these problems from occurring. Time allowing, we will answer questions from the audience as well.

THE FACULTY SEARCH AND APPOINTMENT PROCESS

Presented by: **Angela Yudt**, Acting Director, Faculty Affairs HR
Patricia Gill, Associate Chancellor, Office for Access & Equity

Audience: Individuals who handle faculty searches, such as HR Administrators, Business Managers, Academic Coordinators, etc.

Description: This workshop will provide an overview of the position search process and its requirements, as well as the process for initiating the appointment process (i.e., what actions and documentation are required for the various types of faculty appointments and faculty/administrative appointments). Included will be a discussion of Provost and Board of Trustees required approval.

THE LIFE OF AN AWARD: PRE TO POST AWARD PRACTICES & PITFALLS (PART 2)

Presented by: **Luis Vargas**, Executive Director, Office of Research Services
Vanessa Peoples, Director, Grants & Contracts
Mee Mee Lee Choi, Associate Director, Grants & Contracts
Fuller Lyons, Associate Director, Grants & Contracts
Amneh Kiswani, Assistant Director, Office of Research Services
Patti Pfister, Legal Coordinator & Interim Assistant Director, Office of Research Services

Audience: Business Managers and Research Administrators with a basic understanding of grants

Description: This is a two session collaborative effort between Grants & Contracts and the Office of Research Services to walk workshop participants through a complete cycle of the life of an award. We will incorporate frequently asked questions and potential problem areas for research administrators as we give an interactive overview of the process and potential pitfalls.
Participants must attend both part 1 and part 2.

continued ...

STRATEGIES FOR MANAGING PROJECTS

Presented by: **Jack McEnery**, Director, HRIS/Shared Services
Alan Scott, Specialist, Organizational Effectiveness (HR)

Audience: Coordinators and Assistant Directors (those who have not had to manage a large scale project or need improvement)

Description: This workshop will focus on a number of aspects of project management: defining the project, developing the solution, planning the implementation of the solution, developing milestones, tracking/reviewing progress, along with utilizing technology to support project management. For each aspect of project management, we will identify the challenges, rewards, and tools of working with the project team. We will show an example of using Microsoft Excel as a project management tool.

BRIDGING THE FINANCE-HUMAN RESOURCES COMMUNICATIONS GAP

Presented by: **John Brach**, Director of Human Resources, Institute for Health Research and Policy
Leticia Sanchez, Director of Human Resources, College of Applied Sciences
Paul Racinski, Assistant Director of Business Affairs, Institute for Health Research and Policy
Mary Berta, Business Manager, College of Applied Health Sciences

Audience: Business Administrators and Human Resources Administrators

Description: How can Finance Managers and Human Resources Managers make each other aware of pertinent hurdles and timeframes for processing human resources transactions and ensuring proper grant activity? The panel will attempt to define current campus practices, operating procedures and communication links between Finance and Human Resources and how they affect transaction processing. Discussion will focus on ways to improve communication between these often segregated functions.

V. CONFERENCE PHONEBOOK

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