



Leadership Lived by Taking Care of Business through Professional Excellence



October 24, 2012

2012 ADMINISTRATIVE LEADERSHIP CONFERENCE

**UNIVERSITY OF ILLINOIS
PAC CONFERENCE CENTER
SPRINGFIELD, ILLINOIS**

OCTOBER 24, 2012

2012 Administrative Leadership Conference

Leadership Lived by Taking Care of Business through Professional Excellence

October 24, 2012

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2012 UIS Administrative Leadership Conference

ABOUT THE CONFERENCE

The theme of the 2012 Administrative Leadership Conference is “*Leadership Lived by Taking Care of Business through Professional Excellence*”. The conference will be held on Wednesday, October 24, 2012 from 8:30 a.m. to 4:30 p.m. in the PAC Conference Center at the University of Illinois Springfield.

This leadership conference is sponsored by the Office of Business and Financial Services (OBFS) with the purpose of providing departmental business managers and administrators with knowledge, resources, and networking opportunities to enable them to manage the challenges they face and pursue excellence in their roles at the University. The conference planning team defines professional excellence as:

- being proactive through forecasting and planning;
- being open to different ways of doing business and developing creative solutions to business problems;
- understanding one’s contribution to the success of the individual unit and the University as a whole;
- sharing best practices and methods through collaboration and networking;
- actively developing one’s professional career and the careers of staff members.

The primary goals of the conference include the following:

- to facilitate the sharing of best practices, new knowledge, tips, and tools that are relevant to business leaders and that can be passed to their staff members;
- to provide a forum for business leaders to share problems and concerns and develop possible solutions for some of the most challenging issues they face;
- to encourage networking and collaboration across units, departments, and schools/colleges;
- to recognize the importance of the work being done by this group of administrators and foster a greater sense of purpose and camaraderie.

We encourage you to take time at the end of each workshop, and after the conference, to complete the evaluations so that your feedback may further strengthen future conferences. We hope that you enjoy the conference!

CONFERENCE COORDINATORS

Beth Gorsich, Business Manager I, OBFS Business Services

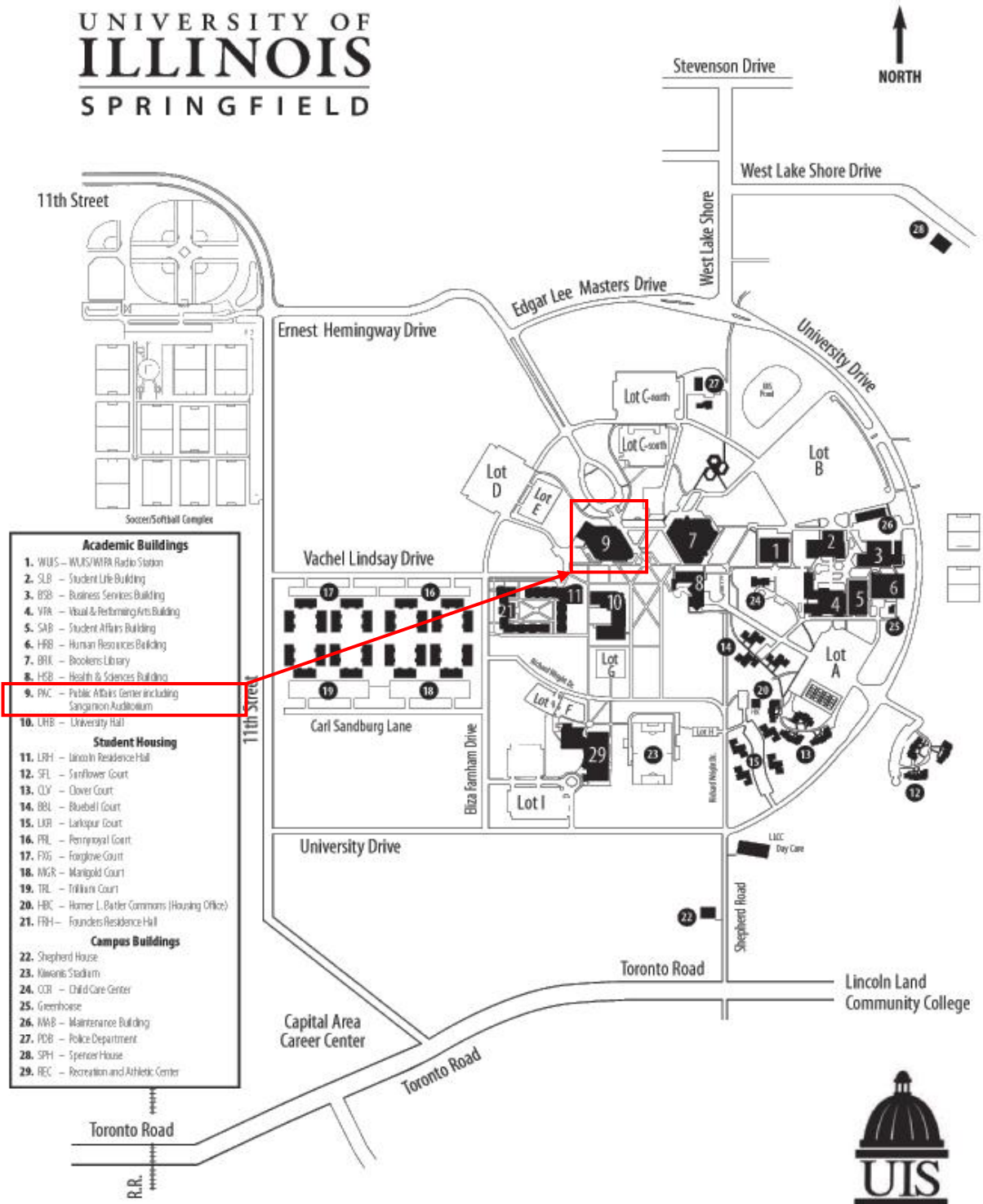
Mary Howard Malcolm, Associate Director, OBFS Training, Performance Development, Communications and Policy

2012 UIS Administrative Leadership Conference

PROGRAM SCHEDULE AT A GLANCE

Wednesday, October 24, 2012		
8:30 – 9:00	Registration / Continental Breakfast	Brookens Lounge
9:00 – 9:15	Welcome and Opening Remarks <ul style="list-style-type: none"> Susan J. Koch, Chancellor Michael Bloechle, Director of UIS Business Services (OBFS) 	Brookens Auditorium
9:15 – 9:30	Break	
9:30 – 10:45	Workshop Session 1	
	Life in the Post-Travel and Expense Management (TEM) World	H
	HireTouch Navigation and the Hiring Process	G
	UIS Contracts Processing / Purchasing Compliance Requirements	F
	Successfully Managing Self-Supporting Funds	E
10:45 – 11:00	Break	
11:00 – 12:15	Workshop Session 2	
	Demystifying the Vendor Payment Process	H
	Current Issues in University Payroll & Benefits (UPB)	G
	Illinois Contract System (iCS) Overview and Demonstration	F
	Reporting and Analysis Highlights	E
12:15 – 12:55	Lunch	Rooms C / D
12:55 – 1:15	Afternoon Address <ul style="list-style-type: none"> Michael Bass, Senior Associate Vice President for Business and Finance (OBFS) Michael Bloechle, Director of UIS Business Services (OBFS) 	Rooms C / D
1:15 – 1:30	Break	
1:30 – 2:45	Workshop Session 3	
	Life in the Post-Travel and Expense Management (TEM) World	H
	HireTouch Navigation and the Hiring Process	G
	UIS Contracts Processing / Purchasing Compliance Requirements	F
	Successfully Managing Self-Supporting Funds	E
2:45 – 3:00	Break	
3:00 – 4:15	Workshop Session 4	
	Demystifying the Vendor Payment Process	H
	Current Issues in University Payroll & Benefits (UPB)	G
	Illinois Contract System (iCS) Overview and Demonstration	F
	Reporting and Analysis Highlights	E
4:15 – 4:30	Conclusion <ul style="list-style-type: none"> Business Manager resource information will be available at this time. 	Studio Theater Concourse

UNIVERSITY OF ILLINOIS SPRINGFIELD MAP



WORKSHOP DESCRIPTIONS

Wednesday, October 24, 2012

Session 1 – 9:30 a.m. – 10:45 a.m.

Session 3 – 1:30 p.m. – 2:45 p.m.

LIFE IN THE POST-TRAVEL AND EXPENSE MANAGEMENT (TEM) WORLD

This workshop will provide an update on working with the University's new travel and expense management system. Included will be best practices regarding system set up, roles within the system, the approval processes, system functionality and process, and the travel card. You will be able to submit questions in advance of the workshop.

Learning Objectives:

- Discuss best practices for working with the Travel and Expense Management System.
- Receive information for how to resolve travel and expense issues.

Presenters:

- **Steve Wiggs**, Director, OBFS University Payables
 - **Darren Strater**, Assistant Director, OBFS University Payables
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HIRETOUCH NAVIGATION AND THE HIRING PROCESS

This workshop will guide campus users through the HireTouch applicant tracking system. We will cover helpful features available to be used in the hiring process. There will be a demonstration of working with the necessary job forms needed for the Academic Professional hiring process.

Learning Objectives:

- Identify tools used to navigate the application.
- Determine the status of a position request.
- Track, manage, and view information about applicants.

Presenter:

- **Melanie Trimm**, Employment Services Manager, Human Resources

UIS CONTRACTS PROCESSING / PURCHASING COMPLIANCE REQUIREMENTS

This workshop will focus on how to navigate the University contracting process. The presenters will define types of contracts, content requirements, and signature policies and procedures. The presenters will review the compliance requirements of the Illinois Procurement Code, the Procurement Policy Board, and the University Board of Trustees as well as subsequent legislation provided by Senate Bill 1750 (Public Act 97-0643) and Senate Bill 2958 (Public Act 97-0895).

Learning Objectives:

- Review the process for handling various types of contracts.
- Receive a foundation for understanding the myriad of compliance issues.
- Identify issues involved with prospective vendors throughout the contracting process.

Presenters:

- **Beth Gorsich**, Business Manager I, OBFS Business Services
 - **Jill Menezes**, Senior Contract Coordinator, OBFS Business Services
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SUCCESSFULLY MANAGING SELF-SUPPORTING FUNDS

Managing self-supporting funds presents many challenges for busy business managers. Learn the results of the FY11 financial and state compliance audits and how to remain compliant. Best practices for year-end reporting and use of self-supporting funds will be discussed.

Learning Objectives:

- Recognize the impact that year-end reporting has on self-supporting funds.
- Describe how to complete the year-end Fact Sheet properly.
- Locate resources available for self-supporting funds.

Presenter:

- **Jason Bane**, Senior Business and Financial Coordinator, OBFS University Accounting and Financial Reporting

WORKSHOP DESCRIPTIONS

Session 2 – 11:00 a.m. – 12:15 p.m.

Session 4 – 3:00 p.m. – 4:15 p.m.

DEMYSTIFYING THE VENDOR PAYMENT PROCESS

Do you struggle with knowing when to use a purchase requisition and when to use an invoice voucher? Do you understand when to use the Special Payment Form? Do you know why sometimes your payment requests don't get paid quickly? This workshop will provide guidelines for avoiding payment issues and will enable you to apply the proper rules and steps for payments. You will be able to submit questions in advance of the workshop.

Learning Objectives:

- Differentiate when to use a purchase order requisition and when to use an invoice voucher.
- Avoid payment snafus so that transactions can get paid on a timely basis.
- Identify payment methods and forms related to payments.

Presenters:

- **Mike Bloechle**, Director, UIS Business Services
 - **Sandy Ehler**, Executive Director, OBFS University Payables
 - **Jim Martinie**, Director, OBFS University Payables
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CURRENT ISSUES IN UNIVERSITY PAYROLL & BENEFITS (UPB)

A panel of UPB subject matter experts will address timely payroll and benefits issues. We will provide information on new systems and discuss how to prevent common problems from occurring. Time allowing, we will answer questions from the audience.

Learning Objectives:

- Review current and upcoming changes in payroll processing regarding awards and timesheet approvals.
- Examine how taxable tuition waivers impact student income.
- Discuss hot topics regarding employee benefits.
- Review Foreign Nationals issues and how to make payments.
- Identify issues relating to payroll, benefits and the end of the tax year.
- Discover the use of the Payroll Adjustment Request Interface System (PARIS) for now and later.

Presenters:

- **Don Smith**, Payroll Manager, University Payroll and Benefits
- **Carole Devaney**, Manager, University Payroll and Benefits
- **Deanna Boyer**, Assistant Manager, University Payroll and Benefits

ILLINOIS CONTRACT SYSTEM (iCS) OVERVIEW AND DEMONSTRATION

This workshop will provide a presentation of the Illinois Contract System (iCS). iCS will streamline contract processes across the University, provide a system for tracking contracts through the approval process, simplify the retention of contracts and provide a centralized, easily accessible system in which attachments and other contract-related documents will be stored. This workshop will include a system demonstration, information about training opportunities, and the iCS Resource Page. This session will familiarize UIS Business Managers with the iCS and prepare them for the Spring 2013 system implementation.

Learning Objectives:

- Relate the processes of the Illinois Contract System (iCS).
- Review the Spring 2013 implementation plan and activities for the iCS.

Presenters:

- **Beth Gorsich**, Business Manager I, OBFS Business Services
 - **Jill Menezes**, Senior Contract Coordinator, OBFS Business Services
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REPORTING AND ANALYSIS HIGHLIGHTS

This workshop will review reports such as the College and Department Multifund reports and the Single Grant Overview (for a PI or Sponsored Research Administrator). Also, there will be an introduction to Excel-based analysis tools: Expense Trends (multi-year expenditure analysis) and FTE Headcount (multi-year employee headcount or FTE analysis).

Learning Objectives:

- Receive an overview of reports for managing funds at a summary level in the department/college.
- Review newest grant management report for a PI or research manager.
- Review Excel-based tools for performing analysis of personnel and non-personnel expenditures as well as associated employee FTE and headcounts.
- Identify appropriate reporting and analysis tools based on needs.

Presenter:

- **Beth Ladd**, Assistant Director, AITS Decision Support
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CONFERENCE PRESENTER DIRECTORY

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