UIC FORUM
April 5, 2018

2018 BRINGING ADMINISTRATORS TOGETHER CONFERENCE

TABLE OF CONTENTS

ABOUT THE CONFERENCE

Target Audience

The target audience for this conference is UIC academic fiscal officers and school/college/department administrators with high-level research, human resources, and business and finance responsibilities.

Mission

This professional development conference will strive to provide the target audience with knowledge, resources, and networking opportunities to enable them to manage the challenges they face and to pursue excellence in their roles at the University. The conference planning team defines professional excellence as:

- 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;
- having a firm understanding of the UIC environment by being aware of changes that significantly impact the University and implementing goals that support the UIC strategic plan.

Goals

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 this target audience and that can be passed down to their staff;
- to provide a forum for this target audience 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.

Conference Sponsors

- Michael Amiridis, Chancellor
- Susan Poser, Provost and Vice Chancellor for Academic Affairs
- Mitra Dutta, Vice Chancellor for Research
- Janet Parker, Associate Chancellor for Budget and Financial Administration
- Michael Ginsburg, Associate Vice Chancellor for Human Resources
- Gloria Keeley, Interim Assistant Vice President for Business and Finance

Conference Planning Team

- Dave Byers, OBFS, Associate Director for Business Solutions and Support
- Bernadette Rossmoore, OBFS, Coordinator of Business and Financial Services
- Seth Yoder, OBFS, Organizational Development Specialist
- Deborah Allen, OBFS, Organizational Development Specialist

REGISTRATION

Please contact the Conference Planning Team at uicadconf9@uillinois.edu with registration questions.

DIRECTIONS

The UIC Forum is located at **725 West Roosevelt Road** (on the corner of Roosevelt Road and Halsted Street). The main entrance to the building faces Halsted.

Driving Directions

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.

From the north: 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 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 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.

Parking

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, you 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. There is also a pay lot on Maxwell Street (MSPS). See map for details:

Public Transportation

The closest public transportation options are the following CTA buses (which can be taken to Blue, Green, Orange or Red 'L' lines), the Intracampus Shuttle, and the Halsted Street Metra Station:

North-South HALSTED BUS #8, Roosevelt Stop:
http://www.transitchicago.com/riding_cta/busroute.aspx?RouteId=167
- Southbound Halsted Bus #8 stops just south of the UIC Forum (Halsted & Roosevelt)
- Northbound Halsted Bus #8 stops just north of the UIC Forum (Halsted & Roosevelt)

East-West ROOSEVELT BUS #12, Halsted Stop:
http://www.transitchicago.com/riding_cta/busroute.aspx?RouteId=173
- Eastbound Roosevelt Bus #12 stops just east of Halsted, right in front of the UIC Forum
- Westbound Roosevelt Bus #12 stops just east of Halsted, across the street from the UIC Forum

Eastbound 16th-18th BUS #18, Halsted Stop:
http://www.transitchicago.com/riding_cta/busroute.aspx?RouteId=177
- Eastbound 16th-18th Bus #18 stops just east of Halsted, right in front of the UIC Forum

Intracampus Bus Service:
http://fmweb.fm.uic.edu/Trans/Intracampus_Weekday.pdf
- Stops on Halsted between Taylor and Roosevelt.

Halsted Street Metra Station (on Halsted between 15th & 16th streets):
https://metrarail.com/maps-schedules/train-lines/BNSF/stations/HALSTED

For more information, please visit:

UIC Campus map:
http://maps.uic.edu/

UIC Forum website:
http://www.uic.edu/depts/uicforum/directions.shtml

Chicago Transit Authority website:
http://www.transitchicago.com/

Metra
http://metrarail.com/metra/en/home.html

PROGRAM SCHEDULE – THURSDAY, APRIL 5, 2018

8:00 am – 9:00 am	**Registration (Lobby) / Breakfast (Main Hall AB)**
9:00 am – 10:00 am	**Welcome Address (Main Hall AB)** • Welcome: Janet Parker, Associate Chancellor for Budget and Financial Administration, and Gloria Keeley, Interim Assistant Vice President for Business and Finance • Keynote Speaker: Michael Popowits, Director of Student Professional Development and Senior Lecturer, Department of Accounting, College of Business Administration, University of Illinois at Chicago, Presentation Title is "Leadership as a Performance Art"
10:00 am – 10:15 am	**Break**
10:15 am – 11:15 am	**Workshop Session 1** • Quarterly and Annual Financial Reports: How to Read, Understand and Use the Information to Improve Your Effectiveness **(Room D)** • Take a Walk and Lose the Waste – How to Identify Process Waste **(Room E)** • Reporting Toolbox: So Many Tools, Which One Should I Use? **(Room F)** • Civil Service Hiring Overview **(Room G)** • Dimensions of a Business Decision **(Room H)** • Little Mistakes Can Cause Big Headaches: Common Errors/Omissions at Sponsored Project Proposal Time **(Room I)**
11:15 am – 11:30 am	**Break**
11:30 am – 12:30 pm	**Workshop Session 2** • RCM Budget Model: Understand UIC's Tuition Distribution Methodology **(Room D)** • Business Process Improvement (BPI) Shared Services - Helping You Save Resources **(Room E)** • Reporting Toolbox: Tricks Behind the Tools **(Room F)** • HR Reports **(Room G)** • Leadership Panel Discussion – Advancing Your Career **(Room H)** • New ORS Electronic Proposal Development System & myResearch Portal Enhancements **(Room I)**
12:30 pm – 1:30 pm	**Lunch (Main Hall AB)**
1:30 pm – 1:45 pm	**Break**

PROGRAM SCHEDULE (Cont.)

1:45 pm – 2:45 pm	**Workshop Session 3** • Improving Financial Data and Reporting: Why Does it Matter What Type of Fund or Program Code I Use? **(Room D)** • Business Process Improvement (BPI) Project Panel Discussion – Hear How Your Colleagues Use BPI to Powerfully Improve HR, Finance and Operations Functions **(Room E)** • How to Get Started with Tableau and Sample Dashboards **(Room F)** • Academic Professional Hiring Overview **(Room G)** • Leadership Essentials **(Room H)** • myProposals Warehouse Data for Web Intelligence Reporting and Analytics **(Room I)**
2:45 pm – 3:00 pm	**Break**
3:00 pm – 4:00 pm	**Workshop Session 4** • UIC's Budget Calendar & Budget Development Process **(Room D)** • Mapping Your Processes - Using Process Maps to Develop an Understanding of the Work you Perform **(Room E)** • A "Deep Dive" into Using EDDIE/Web Intelligence for Financial Reporting **(Room F)** • Crucial Conversations in the Workplace **(Room G)** • Shared Services Model **(Room H)** • Managing Service Centers and Setting Service Rates Intro **(Room I)**

WORKSHOP DESCRIPTIONS

Workshop Session One: 10:15 am – 11:15 am

Quarterly and Annual Financial Reports: How to Read, Understand and Use the Information to Improve Your Effectiveness (Room D)

Presenter:	• **Mark McClellan,** Associate Director, Budget & Financial Analysis
	• **Alejandra Davidson,** Senior Coordinator, Budget and Financial Analysis
Description:	The goal of this session is to provide an overview of various quarterly and annual financial reports that are prepared and distributed to various constituents such as the Board of Trustees (BOT), Deans and Academic Fiscal Officers. The session will cover the Budget Summary for Operations (BSO) presented to the BOT, the Annual College Financial Statements & Management Reports (Budget Grey Books) presented to the Deans and AFOs, as well as others.
Track:	Budget and Finance

Take a Walk and Lose the Waste - How to Identify Process Waste (Room E)

Presenters:	• **Kristi Moore,** Senior Business Analyst, Administrative Information Technology Services
	• **Amy Glenn,** Interim Assistant Director, Business Process Improvement Shared Service
Description:	The longer you have worked in a system/process the harder it is to see the waste around you. Taking a waste walk make the waste visible again. Come learn how to identify the 8 common wastes in today's business processes and begin seeing your business how you never seen it before.
Track:	Innovation and Business Process Improvement

Reporting Toolbox: So Many Tools, Which One Should I Use (Room F)

Presenters:	• **Kasey Wilken,** CPA, MAS, Financial Accounting & Reporting Specialist, University Accounting & Financial Reporting
	• **Jason Bane,** Sr. Business & Financial Coordinator, University Accounting & Financial Reporting
Description:	Overwhelmed by all the systems, reports, and on-going demand for financial information. Join us as we build a reporting tool box. We will flip through the owner's manual on several of the tools to see how they operate. Then we will identify those essential reports to help meet the on-going demand for financial information. My-UI-Financials, ViewDirect, EDDIE.
Track:	Data Access and Analysis

Civil Service Hiring Overview (Room G)

Presenters:
- **Shannon McGinnis,** Deputy Director, Temporary Services/Extra Help
- **Heather Ross,** Deputy Director, Recruitment and Staffing

Description: The focus of the session will be on the Civil Service hiring process with an emphasis on the multiple strategies UIC HR has in place to meet the hiring needs of departments while ensuring interested and qualified applicants have access to job opportunities at UIC. The session will provide an overview of status Civil Service hiring and new business practices related to extra help and temporary staffing.

Track: Human Resources

Dimensions of a Business Decision (Room H)

Presenter:
- **Gloria Keeley,** Interim Vice President, Office of Business and Financial Services

Description: Utilizing real UIC case studies, we will explore decision-making frameworks used when addressing challenging issues within our complex environment. Balancing institutional policy and procedures, state and federal regulations and statutes, with the needs and interests of various stakeholders, requires a multi-dimensional perspective when engaging in business matters on a daily basis.

Track: Leadership Development

Little Mistakes Can Cause Big Headaches: Common Errors/Omissions at Sponsored Project Proposal Time (Room I)

Presenters:
- **Katrina Lopez,** Assistant Director of Compliance, GCO
- **Mee Mee Lee-Choi,** Sr. Assistant Director, GCO
- **Peggy Diskin,** Associate Director, ORS
- **Beth Skendrovic,** Assistant Director, ORS

Description: This session will provide an overview of common errors or omissions at sponsored project proposal time and the issues these may cause down the road if the project is awarded. Participants will be provided with examples and tips to help avoid such errors in the future.

Track: Research

Workshop Session Two: 11:30 am – 12:30 pm

RCM Budget Model: Understanding UIC's Tuition Distribution Methodology (Room D)

Presenter:	• **Thomas Warfield,** Associate Director, Budget & Financial Analysis
Description:	The goal of this session is to provide an overview of the tuition distribution methodology, followed by in-depth discussion on various aspects of the model that impact the flow of tuition revenue to the Colleges.
Track:	Budget and Finance

Business Process Improvement (BPI) Shared Services - Helping You Save Resources (Room E)

Presenters:	• **Amy Glenn,** Interim Assistant Director, Business Process Improvement Shared Service • **Rona Dealy,** Process Improvement Coordinator, Business Process Improvement Shared Service
Description:	Looking to improve your unit's customer service, save staff time or cut costs? The Business Process Improvement Shared Service can lead your improvement project by facilitating discussions, analyze performance, brainstorm and prioritize solutions. Learn about the different types of projects that have been completed at UIC and how the BPI Shared Service can help you.
Track:	Innovation and Business Process Improvement

Reporting Toolbox: Tricks Behind the Tools (Room F)

Presenters:	• **Jerry Myers,** Functional Area Coordinator AITS-Decision Support • **Jason Bane,** Sr. Business & Financial Coordinator, University Accounting & Financial Reporting
Description:	Perhaps you're new to the University or maybe you've been using these reporting tools for years, but are you using their full potential? Join us to discover the tricks behind these tools; like how to schedule your monthly reports, and create personal folders. Get the most from these tools: My-UI-Financials; ViewDirect; EDDIE; Business Objects.
Track:	Data Access and Analysis

HR Reports (Room G)

Presenter:
- **Ken Scott,** Manager, HRIS

Description: This presentation will cover how users can get access to various Human Resource related reporting solutions. We will navigate through some already prepared reports in the HR Reporting portal. We will also discuss how and why we need to keep employee data secure.

Track: Human Resources

Leadership Panel Discussion: Advancing Your Career (Room H)

Presenters:
- **Rich Alpern,** Associate Dean, Administration, College of Liberal Arts and Sciences
- **Kathleen Engstrom,** Associate Dean for Administration, College of Urban Planning and Public Affairs (CUPPA)
- **Dale E. Rush,** CGFM, Associate Dean for Administrative Affairs, College of Pharmacy Privacy Officer, Office of the Dean, College of Pharmacy
- **Todd Van Neck,** Associate Dean for Administration UI College of Medicine
- **Daniel Williams,** CPA, Executive Associate Director of Campus Auxiliary Services, Assistant to the Vice Chancellor for Student Affairs

Description: Successful UIC business leaders will provide their insights on how others at the university might advance their careers. The session will be an open format with a moderator and provide attendees the opportunity to participate in a question and answer process with the panel. Registrants will also have the opportunity to send in individual questions in advance of the April 5th panel discussion.

Track: Leadership Development

New ORS Electronic Proposal Development System & myResearch Portal Enhancements (Room I)

Presenters:
- **Mike Anderson,** Sponsored Project Specialist, Office of Research Services
- **Beth Skendrovic,** Assistant Director, Office of Research Services
- **Peggy Diskin,** Associate Director, Office of Research Services
- **Andrew Tefft,** Analyst, Administrative Information Technology Services

Description: Have you ever had to remind people to get their signatures on your PAFs? During this session, we will provide an overview of the new myProposals system which will enable you to create, route, and submit sponsored research proposals electronically. We will also cover functionality of myResearch Portal, and we will discuss new enhancements to the Portal which will roll out with the new myProposals system. Learning objectives

include recognizing the benefits of moving to an electronic proposal submission system; recalling enhancements being made to myResearch Portal; and navigating to the START myResearch website to locate tips, training materials, and project updates.

Track: Research

Workshop Session Three: 1:45 pm – 2:45 pm

Improving Financial Data and Reporting: Why Does it Matter What Type of Fund or Program Code I Use? (Room D)

Presenters:	• **Nikki Melander,** MSA, CPA, Asst. Director University Accounting & Financial Reporting • **John Laroe,** CPA, Director University Accounting & Financial Reporting
Description:	Aren't all fund codes and program codes basically the same? Can't I just deposit my money anywhere? Can't I just pay my expenses with any old C-FOP I have lying around? Unfortunately, the answer to all of these questions is a resounding NO! Come to this session to find out WHY there are differences between the types of fund codes and the types of program codes we use. We'll give an overview of fund accounting within the University environment. Plus an overview of the NACUBO functions assigned to program codes and explain why understanding this is so important for reporting.
Track:	Budget and Finance

Business Process Improvement (BPI) Project Panel Discussion – Hear How Your Colleagues Use BPI to Powerfully Improve HR, Finance and Operations Functions (Room E)

Presenter:	• **Rona Dealy,** Process Improvement Coordinator, Business Process Improvement Shared Service
Description:	This panel discussion will offer perspectives on how the Business Process Improvement (BPI) Shared Service has helped free up staff time, improve customer service, reduce total cost and deliver services faster for various units across campus, spanning HR, Finance, University and Operations functions. Colleagues will share their project experiences, successes, challenges overcome and much more. Don't miss this exciting discussion!
Track:	Innovation and Business Process Improvement

How to Get Started with Tableau & Sample Dashboards (Room F)

Presenters:	• **Dimuthu Tilakaratne,** Assistant Vice President for Decision Support, Administrative Information Technology Services • **Marissa King,** Associate Director, Budget and Finance, College of Pharmacy
Description:	Tableau is an intuitive drag-and-drop data visualization tool that can provide new and innovative ways to explore and share your financial, HR, alumni, student, or research data. Learn how to quickly get started with

Tableau and get ideas from sample dashboards used by the College of Pharmacy and AITS for department-level, college-level, and external audiences. We will also give you an overview of the University Tableau server that can be used to share your visualizations with the public or university groups.

Track: Data Access and Analysis

Academic Professional Hiring Overview (Room G)

Presenter: • **Keana Galloway,** Associate Director, Office for Access and Equity

Description: This session is intended for anyone responsible for conducting academic searches. The session will provide a thorough overview of the role of OAE in the hiring process. It will also highlight the required HireTouch forms and processes, explanations of the affirmative action procedures required to fill a position and the relevance of law and UIC policy to those procedures.

Track: Human Resources

Leadership Essentials (Room H)

Presenters: • **Laurie Schellenberger,** Human Capital Development Coordinator

Description: An outline of the workshop "Leadership Essentials" facilitated by UIC Human Resources will be shared. Participants will engage in an activity to clarify the difference between the role of a manager and the role of a leader and to identify behaviors that are expected as one moves towards a leadership role.

Track: Leadership Development

myProposals (Kuali Coeus) Warehouse Data for Web Intelligence Reporting and Analytics (Room I)

Presenters: • **Jerry Myers,** Functional Area Coordinator for Finance, Administrative Information Technology Services
     • **Erika Lopez,** Grants and Contracts Associate, Office of Research Services

Description: Are you looking for more reporting options than the myProposals standard reports provide? This presentation is an introduction to the new data sources available in the data warehouse and EDDIE for Proposals, Awards, and Sub-awards. Learning objectives include identifying the different sources of information and understanding the use and business rules applied to the data.

Track: Research

Workshop Session Four: 3:00 pm – 4:00 pm

UIC's Budget Calendar & Budget Development Process (Room D)

Presenter:	• **Mary Ellen Korman,** Associate Director, Budget & Financial Analysis
Description:	The goal of this session is to provide an overview of the "cradle-to-grave" budget cycle, followed by in-depth discussion on using the Budget Development System and the Budget Queries module.
Track:	Budget and Finance

Mapping Your Processes - Using Process Maps to Develop an Understanding of the Work You Perform (Room E)

Presenter:	• **Kristi Moore,** Senior Business Analyst, Administrative Information Technology Services
Description:	If a picture says a thousand words, what value would you put on the picture? Come learn how to create a picture of your business process to communicate to your team how your business work flows. You will learn about the tools used to process map, how to create a map of your business process, and identifying opportunities for improvement in your business
Track:	Innovation and Business Process Improvement

A "Deep Dive" into Using EDDIE / Web Intelligence for Financial Reporting (Room F)

Presenters:	• **Brian Shim,** Assistant to Head - Financial, Department of Physics • **Sabah Basrawi,** Institute for Health Research and Policy • **Mint Simagrai,** Director of Operations, Office of International Services
Description:	Are you ready to take the next step from running EDDIE / Web Intelligence reports to creating your own? This session will be a live demonstration of how to create your own custom financial report, using real-world examples from the UIC Reporting Subcommittee. We will also give an overview of popular Finance universes in the data warehouse, and show you how to use reports in the Solution Library as a starting point to create your own custom reports.
Track:	Data Access and Analysis

Crucial Conversations in the Workplace (Room G)

Presenter:
- **Laurie Schellenberger,** Human Capital Development Coordinator

Description: The training teaches skills for communicating when the stakes are high, opinions vary and emotions run strong. This session introduces participants to Crucial Conversations and teaches one skill from the training that can be used in difficult situations. Crucial Conversations is a proprietary training created by VitalSmarts and the authors of the book Crucial Conversations: Tools for Talking When Stakes are High and is facilitated by a certified instructor.

Track: Human Resources

Shared Services Model (Room H)

Presenters:
- **Amber Munds,** Director, Business Solutions and Support, Office of Business and Financial Services
- **Brad DeMent,** Partner, ScottMadden Management Consultants

Description: Join us in this session to explore the ideas and best practices behind shared service centers and working models within higher education. We will navigate the vision behind their creation, support structure, and continued process improvement that makes the shared service center model beneficial to public and private institutions alike. By attending, you will take away ideas on shared service opportunities and the resources available to start your journey into learning more.

Track: Leadership

Managing Service Centers and Setting Service Rates Intro (Room I)

Presenters:
- **Shelly Benson,** Senior Director of Government Costing (OBFS)
- **Anne Marshall,** Assistant Director of Government Costing (OBFS)
- **Maureen Johnson,** Assistant Director of Government Costing (OBFS)

Description: Storeroom and service centers (3E fund types) are established primarily to provide goods or services to other internal University departments. Each service center is its own business operation and must calculate and charge rates for the services and/or products they provide. Many of these 3E service activities charge federal and other sponsored projects, and as a result, the University must comply with Federal costing principles and State regulations for service centers.

The workshop session will summarize the various Federal and State regulations, outline methods service center managers should use when identifying costs, determining usage/base, identifying an over/under recovery, setting rates, and charging users.

Track: Research

Workshop and Conference Evaluations

Please take a few minutes after each workshop to complete the workshop evaluation. This will give the workshop presenters feedback on what was valuable to you and will identify opportunities for improvement.

Following the conference, you will receive an email with a link to the conference evaluation. Again, we encourage you to complete the evaluation to let us know if the conference program met your needs and fulfilled your expectations. Your comments and suggestions are very valuable to us, and we appreciate receiving your opinions.