



2020 BRINGING ADMINISTRATORS TOGETHER CONFERENCE



MARCH 31, 2020



ISADORE AND SADIE
DORIN FORUM

TABLE OF CONTENTS

ABOUT THE CONFERENCE.....	1
REGISTRATION.....	3
DIRECTIONS.....	3
PROGRAM SCHEDULE – TUESDAY, MARCH 31, 2020	5
WORKSHOP DESCRIPTIONS	7
WORKSHOP AND CONFERENCE EVALUATIONS.....	19

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; and
- providing 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; and
- 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
- Joanna Groden, Vice Chancellor for Research
- Janet Parker, Associate Chancellor for Budget and Financial Administration
- Michael Ginsburg, Associate Vice Chancellor for Human Resources
- Gloria Keeley, Assistant Vice President for Business Services, Office of the CFO

Conference Planning Team

- Dave Byers, Interim Senior Associate Director, Office of Business Services, Business Solutions and Support, Office of the CFO
- Dana Librot, Coordinator of Business and Financial Services, Office of Business Services, Office of the CFO
- Bernadette Rossmoore, Coordinator of Business and Financial Services, Office of Business Services, Office of the CFO

- Seth Yoder, Senior Organizational Development Specialist, Office of Business Services, Business Solutions and Support, Office of the CFO

REGISTRATION

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

DIRECTIONS

The UIC Dorin 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 Street.

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 Dorin 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).

Public Transportation

The closest public transportation options are the following CTA buses (which can be taken to Blue, Green, Orange or Red 'L' lines) 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

Halsted Street Metra Station (on Halsted between 15th & 16th streets):

<https://metra.com/train-lines/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

<https://metra.com/>

PROGRAM SCHEDULE – TUESDAY, MARCH 31, 2020

7:30 am – 8:30 am	Registration (Lobby) / Breakfast (Main Hall AB)
8:30 am – 9:10 am	Welcome Address / Keynote Speaker (Main Hall AB)
9:10 am – 9:20 am	Break
9:20 am – 10:35 am	<p><u>Session 1</u></p> <ul style="list-style-type: none"> • UIC Leaders, System Leaders, and the Board are Looking at Your Financials: What Do They See?: (Room D) <i>Budget & Finance Track</i> • UIC Institutional Research Office: Overview of Data and Analytical Services Available: (Room E) <i>Data & Access Track</i> • Hiring at UIC - Part 1: (Room F) <i>Human Resource Track</i> • All About Contracts at UIC: (Room G) <i>Procurement Track</i> • Driving Engagement, Teamwork and Collaboration Within Your Unit: (Room H) <i>Professional Development Track</i> • Post-Award Management: (Room I) <i>Research Track</i>
10:35 am – 10:45 am	Break
10:45 am – 12:00 pm	<p><u>Session 2</u></p> <ul style="list-style-type: none"> • University Budget Models: RCM, Tuition Revenue Distribution, Hybrid Model: (Room D) <i>Budget & Finance Track</i> • Just the Tricks - Timesaving Tricks for EDDIE, MobiusView, Banner and My-UI-Financials: (Room E) <i>Data & Access Track</i> • Hiring at UIC - Part 2: (Room F) <i>Human Resource Track</i> • TEM tips and future roadmap: Suggestions and examples for improving efficiency and reducing frustration; current related activities (Source2Pay & TRIP): (Room G) <i>Procurement Track</i> • The Brain at Work: Applying Neuroscience to Leadership Competencies in Order to Effectively Communicate, Collaborate and Lead: (Room H) <i>Professional Development Track</i> • Compliance Oversight in Research: Export Controls, Sexual Harassment, Foreign Influence & COI: (Room I) <i>Research Track</i>
12:00 pm – 1:00 pm	Lunch (Main Hall AB)
1:00 pm – 1:10 pm	Break

PROGRAM SCHEDULE (Cont.)

1:10 pm – 2:25 pm	<p><u>Session 3</u></p> <ul style="list-style-type: none"> • Internal Controls & Prevention/Detection of Fraud: (Room D) <i>Budget & Finance Track</i> • PO Payments to Vendors: Tips for Submission and Tracking: (Room E) <i>Data & Access Track</i> • Employee Relations: (Room F) <i>Human Resource Track</i> • Procurement at UIC: Requirements under The Illinois Procurement Code and Rules: (Room G) <i>Procurement Track</i> • Leadership Roundtable Discussion: UI Business Leaders Provide Insight on Career Advancement Success: (Room H) <i>Professional Development Track</i> • Issues in Contracts for Sponsored Program Research: (Room I) <i>Research Track</i>
2:25 pm – 2:35 pm	<p>Break</p>
2:35 pm – 3:50 pm	<p><u>Session 4</u></p> <ul style="list-style-type: none"> • Overview of Risk Management and Insurance: (Room D) <i>Budget & Finance Track</i> • "Deep Dive" on Using Business Objects: (Room E) <i>Data & Access Track</i> • UIC Employment Cycle: (Room F) <i>Human Resource Track</i> • We all buy with iBuy! – Become an eProcurement Expert: (Room G) <i>Procurement Track</i> • Emotional Intelligence: Self-Awareness and Self-Management: (Room H) <i>Professional Development Track</i> • Payments to Students: (Room I) <i>Research Track</i>

SESSION DESCRIPTIONS

Session One: 9:20 am – 10:35 am

UIC Leaders, System Leaders, and the Board are Looking at Your Financials: What Do They See? (Room D)

- Presenter:** **Janet Parker**, Associate Chancellor for Budget and Financial Administration
- Michael Moss**, Assistant Chancellor and Director, Office of Budget and Financial Analysis
- Mark McClellan**, Associate Director, Office of Budget and Financial Analysis
- Description:** This session will provide an overview of several key financial reports that are routinely prepared for various stakeholders – both internal and external audiences (such as UIC’s annual operating budget, IBHE cost study). The goal of the session is to increase knowledge around what financial information is communicated and how college and administrative unit financial staff can positively impact the accuracy and reliability of the information.
- Track:** Budget and Finance

UIC Institutional Research Office: Overview of Data and Analytical Services Available (Room E)

- Presenters:** **Bill Hayward**, Associate Vice Provost and Director, Office of Institutional Research
- Stephanie Estrada**, Senior Associate Director, Office of Institutional Research
- Anna Pasillas-Santoyo**, Associate Director, Office of Institutional Research
- Description:** An overview of data and analytical services offered by the Office of Institutional Research (OIR). Topics covered with include the OIR website and the interactive dashboards and static reports made available via the website. We will also cover the various data sets and data sources available via ad-hoc requests to OIR, including student cohort data. Case studies and examples will be included.
- Track:** Data and Access

Hiring at UIC - Part 1 (Room F)

Presenters: Shannon McGinnis, Deputy Director, Human Resources at UIC

Heather Ross, Deputy Director, Human Resources at UIC

Description: The session will focus on the Civil Service hiring processes for Permanent, Extra Help and Temporary Services with an emphasis on the multiple strategies UIC HR has in place to meet the hiring needs of departments and ensure that interested and qualified applicants have access to job opportunities at UIC.

Track: Human Resources

All About Contracts at UIC (Room G)

Presenters: Debra Matlock, Director of Purchasing, UIC Purchasing

Description: This session will provide an overview of different types of contracts executed at UIC, including which office should be contacted to process what types of contracts; the contracting process (forms, reviews, approvals); and how you can avoid delays in that process.

Track: Procurement

Driving Engagement, Teamwork and Collaboration Within Your Unit (Room H)

Presenter: Laurie Schellenberger, Human Capital Development Coordinator

Description: Team collaboration is the cornerstone of any successful organization. Collaborative workplaces see increased levels of trust, a more engaged workforce, and improved performance. Our discussion will focus on the key behaviors and strategies managers need to demonstrate to positively impact employee engagement.

Track: Professional Development

Post-Award Management (Room I)

Presenters: Karen McCormack, Executive Director, Office of Sponsored Programs

Mee Mee Lee-Choi, Director, Post Award Services, Office of Sponsored Projects

Description: This session will explore various hot topics in the post-award administration of sponsored projects that frequently surface during audits or other

compliance reviews. We will delve into topics such as cost transfers, overdrafts, subaward invoicing/monitoring, closeouts, etc. to help to identify and avoid common pitfalls and share best practices to successfully manage your unit's sponsored awards.

Track:

Research

Session Two: 10:45 am – 12:00 pm

University Budget Models: RCM, Tuition Revenue Distribution, Hybrid Model (Room D)

- Presenter:** **Janet Parker**, Associate Chancellor for Budget and Financial Administration
- Michael Moss**, Assistant Chancellor and Director, Office of Budget and Financial Analysis
- Colleen Kehoe**, Associate Director, Office of Budget and Financial Analysis
- Description:** This session will provide an overview of university budgeting and how it is implemented at UIC. We will review several university budget models, the pros and cons of each, and how a Hybrid RCM (Responsibility Center Management) model is used at UIC. Details of how the Tuition Revenue and ICR Revenue is budgeted will be discussed.
- Track:** Budget and Finance

Just the Tricks - Timesaving Tricks for EDDIE, MobiusView, Banner and My-UI-Financials (Room E)

- Presenters:** **Jerry Myers**, Functional Area Coordinator, AITS
- Jason Bane**, Senior Business and Finance Coordinator, UAFR
- Description:** Many of you use these tools every day. Are you taking full advantage of their capabilities and their shortcuts? This session covers some of the tricks to make our financial tools easier and more efficient to use. By attending this session, you will be able to:
- Schedule EDDIE reports to gain valuable time lost running monthly standard reports
 - Alter existing reports using Web Intelligence to meet your needs
 - Customize Banner, Mobius View and, EDDIE to quickly access your favorite pages and reports
 - View aggregated financial information and a 5-year data comparison
- Track:** Data and Access

Hiring at UIC - Part 2 (Room F)

- Presenters:** **Keana Galloway**, Associate Director, Office for Access and Equity

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

Track: Human Resources

TEM tips and future roadmap: Suggestions and examples for improving efficiency and reducing frustration; current related activities (Source2Pay & TRIP) (Room G)

Presenters: **Jim Martinie**, Senior Director, University Payables
Susie Baker, Senior Associate Director, University Payables
Darren Strater, Associate Director, Support Services, University Payables

Description: See how to avoid inefficiency and frustration with the current reimbursement process....including examples of the most common situations. Current related project activities and timelines (Source2Pay and TRIP) will also be presented

Track: Procurement

The Brain at Work: Applying Neuroscience to Leadership Competencies in Order to Effectively Communicate, Collaborate and Lead (Room H)

Presenter: **Dave Byers**, Interim Senior Associate Director, Office of Business Services, Business Solutions and Support, Office of the CFO

Description: We are all leaders, some formal and some informal and have the capability to impact others and outcomes in the workplace. To best impact others, we need to understand and incorporate the neuroscience of effective communication and collaboration. This is best accomplished when we create conditions where others are open to our ideas and we create shared understandings. Current research reveals that effective leaders have developed eleven competencies found inside four categories: self - development, interpersonal development, organization and group development, and transitional development. This session will cover the neuroscience that supports those four developmental areas in order to more effectively communicate, collaborate and lead.

Track: Professional Development

Compliance Oversight in Research: Export Controls, Sexual Harassment, Foreign Influence & COI (Room I)

Presenters: **Patricia Pfister**, Export Controls Compliance Officer, Office of the Vice Chancellor for Research

Jacquelyn Jancius, Director, Conflict of Interest, Office of the Vice Chancellor for Research

Description: The topic of foreign influence in federally sponsored research has been given significant attention by multiple government agencies. The term foreign influence relates to economic and political espionage, and the protection of the intellectual property and scholarship of U.S. researchers from exploitation by “foreign governments and external entities.” While the University of Illinois at Chicago (UIC) strongly supports affiliations with foreign institutions, collaborative research and scholarly exchanges, UIC must comply with U.S. laws and regulations that govern how international engagements are managed.

In addition, UIC is committed to creating and maintaining an educational, research, working, and living environment free from all forms of unlawful harassment and sexual misconduct. Two federal granting agencies have strengthened guidelines for reporting sexual misconduct and harassment by investigators and key personnel named in a notice of award.

Track: Research

Session Three: 1:10 pm – 2:25 pm

Internal Controls & Prevention/Detection of Fraud (Room D)

Presenter: **Neal Crowley**, Director, Office of University Audits

Jeff Kulik, Director of Business and Finance, Office of the Vice Chancellor for Administrative Services

Deborah Rahn, Director, Customer Service and Cashier Operations, University Student Financial Services and Cashier Operations

Jeff Weaver, Senior Director, Property Accounting, University Accounting and Financial Reporting

Description: A panel discussion highlighting the different processes, procedures and best practices for setting up internal controls. Will include information on University audits, managing charts of accounts, equipment management, reporting, SecApp, cash/check handling and reconciliations. Will also include best practices from a unit business management perspective. Case studies and examples will be included.

Track: Budget and Finance

PO Payments to Vendors: Tips for Submission and Tracking (Room E)

Presenters: **Angela Bensyl**, Senior Coordinator, Payment Operations, University Payables

Leah Hamilton, Specialist, Payment Operations, University Payables

Description: This session will provide direction on PO invoice submission and on tracking invoice payments in Banner and BDM. We will also discuss how to resolve held invoices, and how to research unpaid or rejected invoices.

Track: Data and Access

Employee Relations (Room F)

Presenters: **Monica Holt**, Human Resource Associate, Human Resources at UIC

Milan Valuch, Human Resource Associate, Human Resources at UIC

Description: The session will highlight best management practices and employee relations services provided by UIC HR and will provide leaders with general direction for managing workplace concerns and employee relations cases in a fair and consistent manner. The presentation will provide an overview of “A Supervisor’s Guide to Employee Relations” which is a leadership handbook that explains the University’s system of corrective and progressive discipline, documentation that is needed to support a case, and how to determine when discipline is necessary.

Track: Human Resources

Procurement at UIC: Requirements under The Illinois Procurement Code and Rules (Room G)

Presenters: **Arlene Shorter**, Senior Assistant Director, UIC Purchasing

Description: This session will provide an overview of the various methods for procuring goods and services. The focus of the session will be on Competitive Procurements (Invitation for Bids, Request for Proposals), Small Purchases, Sole Sources, Emergencies, and Exemptions. Learning objectives include identifying the reasons for each method and rules that are applicable.

Track: Procurement

Leadership Roundtable Discussion: UI Business Leaders Provide Insight on Career Advancement Success (Room H)

Presenter: **Caryn Bills-Windt**, Associate Chancellor, Office for Access and Equity

Michael Moss, Assistant Chancellor and Director, Office of Budget and Financial Analysis

Kimberly Miller, Director of Finance and Administration, Office of the Dean, School of Public Health

Description: Successful UIC business leaders will provide insight 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 March 31st panel discussion.

Track: Professional Development

Issues in Contracts for Sponsored Program Research (Room I)

Presenters: **Peggy Diskin**, Director, Pre-Award Services, Office of Sponsored Programs

Kevin Wleklinski, Sponsored Project Specialist, Office of Research Services

Description:

This session will offer participants an opportunity to take a look at some fundamental contracting concepts and then delve into more complex issues associated with terms and conditions. Topics to be covered include processing Confidential Disclosure Agreements, Non-Disclosure Agreements, Subcontracts and Clinical Trials. The discussion will include examples of what to watch out for as well as potential negative impacts to the institution. The session will also propose strategies for mitigating risk associated with these contract terms: Publication, Indemnification, Intellectual Property/Patents and Ownership of Data.

Track:

Research

Session Four: 2:35 pm – 3:50 pm

Overview of Risk Management and Insurance (Room D)

Presenter: Tina Harlan, Director, Risk Management, Office of the Treasury

Description: An overview of services provided by the Office of Risk Management, and a review of the University's insurance programs and related areas that may impact your units' programs

Track: Budget and Finance

"Deep Dive" on Using Business Objects: (Room E)

Presenters: Sabeh Basrawi, Administrative Assistant, Cancer Center

Jerry Myers, Functional Area Coordinator, AITS

Brian Shim, Assistant to the Head, Financial, Department of Physics

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 and Access

UIC Employment Cycle (Room F)

Presenters: Michael Ginsburg, Associate Vice Chancellor for Human Resources

Description: This session will examine the full employment cycle, highlighting best practices for on-boarding employees, managing employees and off-boarding. A focus of the session will include policies, procedures and transactions as they relate to the employment cycle.

Track: Human Resources

We all buy with iBuy! – Become an eProcurement Expert (Room G)

Presenters: **Aaron Rosenthal**, Senior Assistant Director, UIC Purchasing

Description: This session will provide an overview of the iBuy eProcurement solution and teach you how to leverage iBuy to successfully address your department's purchasing needs. Topics will include: 1) catalog v. non-catalog orders; 2) differences between the various iBuy forms; 3) workflow status to identify exactly where your work is; and 4) search/reporting capabilities. Along the way, we'll share potential pitfalls, how to avoid them, and tips & tricks for becoming an iBuy power user. Also tune-in for a sneak peek at what's planned for the future of iBuy through the Source2Pay "iBuy Optimization" effort.

Track: Procurement

Emotional Intelligence: Self-Awareness and Self-Management (Room H)

Presenter: **Teresa Oliszewicz**, Director, Organizational Development, System Human Resource Services
Jackie Billhymer, HR Coordinator, System Human Resource Services

Description: We likely know people who seem to have a lot of awareness about their own emotional state who also seem to know how to manage their emotions (and themselves) when it really counts. They also seem adept at building and maintaining relationships through effective use of empathy and key social skills. Those people would be described as having high Emotional Intelligence (EI), and it can be easy to view them as having some kind of special gift or natural ability that makes them effective. The good news is that we can all raise our emotional self-awareness and develop skills to improve our relationships with others. Attend this session to learn a few tips and hints on how to do so!

Track: Professional Development

Payments to Students (Room I)

Presenters: **William Patterson**, Senior Director, University Student Financial Services and Cashier Operations

Description: This session will highlight recent changes to OBFS guidance regarding Payments to Students, with emphasis on newly published Policies and Procedures, a new Payment Selector Tool, Research and Travel payments, and payments to foreign national students. Time will also be reserved for audience discussion, questions and answers.

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.