



*Leadership Lived: Partners in Excellence*



*April 22, 2015*

**2015 ADMINISTRATIVE LEADERSHIP CONFERENCE**

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

**APRIL 22, 2015**

**2015 Administrative Leadership Conference**

*Leadership Lived: Partners in Excellence*

April 22, 2015

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## **2015 Administrative Leadership Conference**

### ***ABOUT THE CONFERENCE***

The theme of the 2015 Administrative Leadership Conference is “*Leadership Lived: Partners in Excellence*”. The conference will be held on Wednesday, April 22, 2015 from 8:30 a.m. to 4:15 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 SPONSORS***

Office of Business and Financial Services

**Michael Bloechle**, Director of UIS Business Services

**Michael Bass**, Senior Associate Vice President for Business and Finance and Deputy Comptroller

### ***CONFERENCE COORDINATORS***

**Cheryl Churchill**, Business Manager, UIS-OBFS Business Services

**Mary Howard Malcolm**, Associate Director, Administrative Services - OBFS Training, Performance Development, Communications and Policy

## 2015 Administrative Leadership Conference

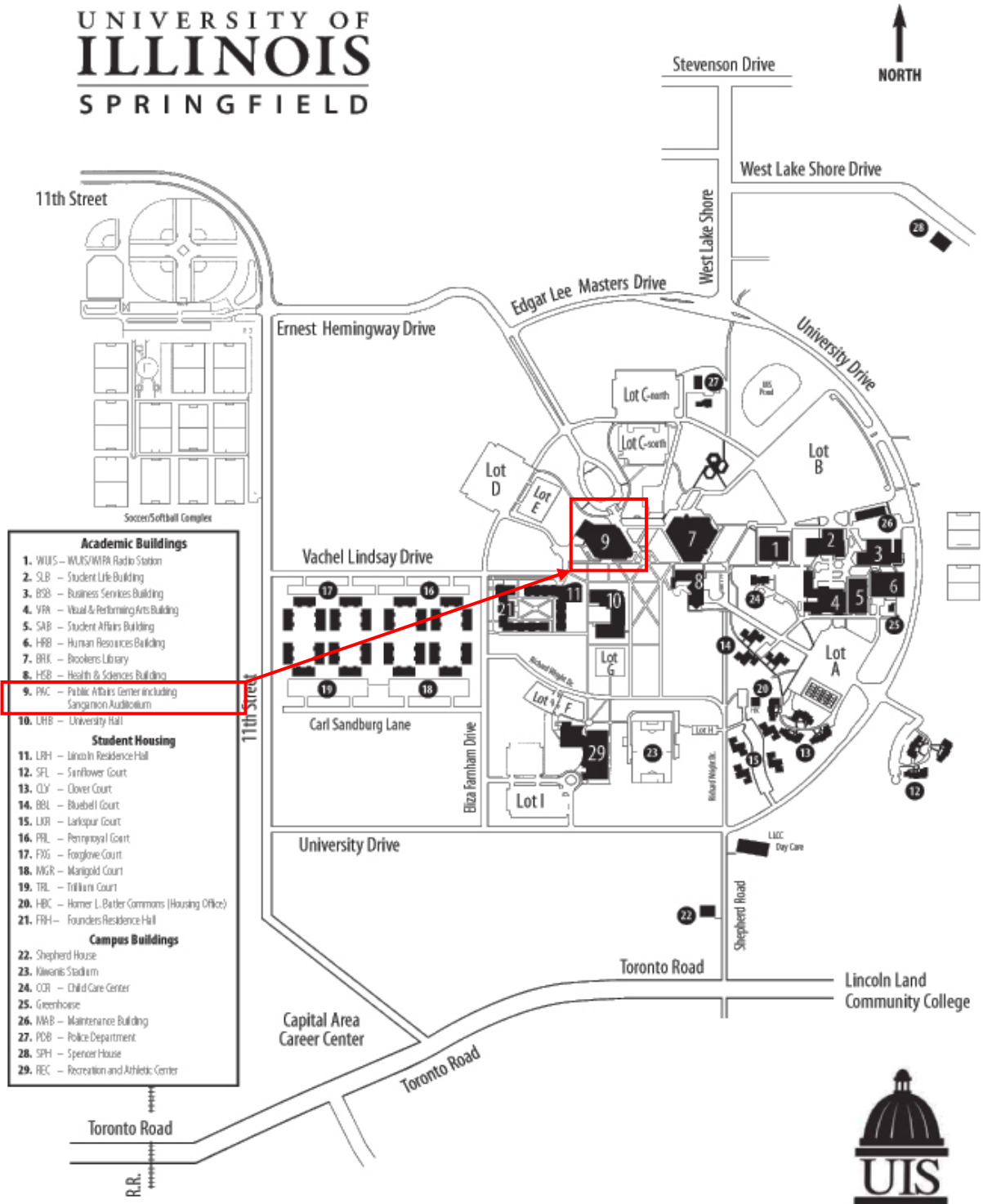
### *PROGRAM SCHEDULE AT A GLANCE*

Wednesday, April 22, 2015		
8:30 – 9:00	<b>Registration / Continental Breakfast</b>	Brookens Lounge
9:00 – 9:15	<ul style="list-style-type: none"> <li>• <b>Welcome and Opening Remarks</b> – Mike Bloechle, Director of UIS Business Services (OBFS)</li> <li>• <b>Speaker</b> – Donna McNeely, Executive Director, University Ethics and Compliance Office</li> </ul>	Brookens Auditorium
9:15 – 9:30	<b>Break</b>	
9:30 – 10:45	<b>Workshop Session 1</b>	
	Banner Finance Tips and Tricks <b>(R)</b>	PAC G
	Fund Accounting 101	PAC E
	Using the Right Purchasing Method <b>(R)</b>	PAC F
	What Can UPAY Do For You?	PAC H
10:45 – 11:00	<b>Break</b>	
11:00 – 12:15	<b>Workshop Session 2</b>	
	The Brain at Work: Conversations That Drive Positive Change <b>(R)</b>	PAC H
	Internal Controls and Fraud Prevention	PAC F
	Let's Explore the New U of I Financial Report Distribution Tool <b>(R)</b>	PAC G
	Records and Information Management System (RIMS): We're Here to Help! <b>(R)</b>	PAC E
12:15 – 1:15	<b>Lunch / Conference Address</b>	PAC C / D
	<ul style="list-style-type: none"> <li>• <b>Speaker</b> – Michael Bass, Senior Associate Vice President for Business and Finance and Deputy Comptroller (OBFS)</li> </ul>	
1:15 – 1:30	<b>Break</b>	
1:30 – 2:45	<b>Workshop Session 3</b>	
	Banner Finance Tips and Tricks <b>(R)</b>	PAC G
	Equipment Management FUNdamentals: What Every Business Manager Needs to Know to Stay in Compliance	PAC E
	Using the Right Purchasing Method <b>(R)</b>	PAC F
	What's New in Business Objects Web Intelligence?	PAC H
2:45 – 3:00	<b>Break – Refreshments will be served</b>	
3:00 – 4:15	<b>Workshop Session 4</b>	
	The Brain at Work: Conversations That Drive Positive Change <b>(R)</b>	PAC H
	Let's Explore the New U of I Financial Report Distribution Tool <b>(R)</b>	PAC G
	Navigating the Different HR Policies for Academic Professional vs. Civil Service Employees	PAC F
	Records and Information Management System (RIMS): We're Here to Help! <b>(R)</b>	PAC E

**(R) = Workshop is repeated during another session**

# 2015 Administrative Leadership Conference

## UNIVERSITY OF ILLINOIS SPRINGFIELD MAP



## 2015 Administrative Leadership Conference

### *WORKSHOP DESCRIPTIONS*

#### **Workshop Session 1 – 9:30 a.m. – 10:45 a.m.**

##### ***BANNER FINANCE TIPS AND TRICKS***

Learn how to utilize Banner to get the maximum results! We'll decode the crazy Banner form names, show which Banner form to use for different processes, and shortcuts and tips to use Banner for searches and so much more!

##### **Learning Objectives:**

- Use Banner more efficiently utilizing shortcuts and tips provided.
- Identify the correct Banner form to use for different processes.

##### **Presenters:**

- **Sherri Faith**, Associate Director, University Accounting and Financial Reporting
  - **Rebecca Jones**, Assistant Director, Grants and Contracts Office
  - **Jason Bane**, Senior Business & Finance Coordinator, University Accounting and Financial Reporting
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##### ***FUND ACCOUNTING 101***

Let's discuss Fund Accounting at the University of Illinois! What are state funds, institutional funds, self-supporting funds, and gift funds? What are the best practices for these funds? Join University Accounting & Financial Reporting as we provide an overview of these funds, limitations on use, common mistakes and ways to avoid them.

##### **Learning Objectives:**

- Identify the basics of Fund Accounting.
- Review best practices for state, institutional, self-supporting, and gift funds.
- Examine methods to avoid common mistakes.

##### **Presenter:**

- **Tim Parrish**, Financial Accounting & Reporting Analyst, University Accounting and Financial Reporting

### ***USING THE RIGHT PURCHASING METHOD***

The workshop will cover the various purchasing methods and options available for setting up contracts, how bids/RFPs are processed and when to use them, and how to determine which methods will work best for your procurement requirements.

#### **Learning Objectives:**

- Determine the most appropriate methods to procure items.
- Review the types of contracts available and the required contract elements.
- Discuss the bid/RFP process and general purchasing information to help make your job easier.

#### **Presenters:**

- **Debi Barr-Holquist**, Contract Coordinator, Purchasing Office
  - **Jill Menezes**, Senior Contract Coordinator, Purchasing Office
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### ***WHAT CAN UPAY DO FOR YOU?***

University Payables will provide information on the year-end closing, tips for processing payments properly, and helpful hints and reminders for TEM, T-Card and iTravel.

#### **Learning Objectives:**

- Prepare for fiscal year-end activities.
- Recognize how to avoid employee reimbursement rejections.
- Avoid T-Card non-compliance.
- Receive iTravel updates.

#### **Presenters:**

- **Melissa Plotner**, Assistant Director of Payment Operations, University Payables
- **Tammy Ziegler**, Coordinator of Direct Payments, University Payables
- **Cathy Young**, Senior Coordinator of Outreach, Education, Communication, Travel Management Office, University Payables

## 2015 Administrative Leadership Conference

### Workshop Session 2 – 11:00 a.m. – 12:15 p.m.

#### ***THE BRAIN AT WORK: CONVERSATIONS THAT DRIVE POSITIVE CHANGE***

Are you tired of trying to help your staff see how to improve their work performance or to embrace new ideas or changes in the workplace? Or you feel there must be a better way to have conversations that impact positive change? If you want dramatically different results then you need to have significantly different conversations. This workshop will provide you with an introduction to tools needed to achieve powerful improvements in your employees' performance through presenting unique and highly effective approaches to coaching and communicating.

This workshop combines the best ideas of current experts in neural science, coaching, communication and leadership with a focus on communicating in ways that best work with brain function and how people think. Leaders, managers and supervisors will have the opportunity to learn how to have conversations that facilitate positive change in employees.

#### **Learning Objectives:**

- Discuss the effects of communication and coaching in the workplace.
- Apply some foundational communication and coaching skills in your daily conversations with employees in order to facilitate positive change in their performance.

#### **Presenter:**

- **David Byers**, Associate Director for Performance Development, AS Training, Performance Development, Communications and Policy

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#### ***INTERNAL CONTROLS AND FRAUD PREVENTION***

This workshop will cover primary internal controls that should be implemented within University units for major University business cycles. We will also provide information about common fraud scenarios that occur in higher education and discuss internal controls that can be introduced to mitigate fraud risk.

#### **Learning Objectives:**

- Identify primary internal controls for major University business processes, including the most common weaknesses noted in University internal audits.
- Discover tips to assess various control options when resources are limited.
- Examine common fraud scenarios in higher education and how these scenarios occur within our specific environment at the University.
- Determine how fraud and internal controls relate.

#### **Presenter:**

- **Jessica Hoppe**, Enterprise-wide Auditor, Office of University Audits



## 2015 Administrative Leadership Conference

### ***LET'S EXPLORE THE NEW U OF I FINANCIAL REPORT DISTRIBUTION TOOL***

Have you heard the buzz about the new U of I Financial Report Distribution tool and wondered what it was? Do you struggle with printing month-end financial reports and distributing them to faculty and principal investigators? Join University Accounting & Financial Reporting and Grants & Contracts as we demonstrate this new report distribution tool. We will demonstrate the all-funds and grants tabs, the drill-down to transaction capabilities, the interface to the month-end financial reports, and the Report View Module.

#### **Learning Objectives:**

- Review the functionality of the U of I Financial Report Distribution tool.
- Determine if this tool meets the needs of your department.

#### **Presenters:**

- **Sherri Faith**, Associate Director, University Accounting and Financial Reporting
- **Amy Roessler**, Associate Director, Grants and Contracts Office (Post-Award)
- **Toni Langdon**, Business Manager, Illinois Issues / Center Publications

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### ***RECORDS AND INFORMATION MANAGEMENT SYSTEM (RIMS): WE'RE HERE TO HELP!***

When is a record not a record and why should it matter to me? This workshop will outline your responsibilities for managing records and information. Topic include how to dispose of records, store records, and how to transfer records to the University Archives. In addition, we will discuss how to create a Records and Administrative Data Management Plan.

#### **Learning Objectives:**

- Identify where to go for detailed information about University records.
- Define obligations for managing records and other information assets.
- Describe how to initiate a request for records disposals or transfers.
- Name the steps to create a department-level Records and Administrative Data Management Plan.

#### **Presenters:**

- **Jordan Phoenix**, Assistant Director, Records & Information Management Services
- **Linnea Knapp**, Assistant Director, Records & Information Management Services
- **Thomas Wood**, University Archivist

## 2015 Administrative Leadership Conference

### Workshop Session 3 – 1:30 p.m. – 2:45 p.m.

#### ***BANNER FINANCE TIPS AND TRICKS***

Learn how to utilize Banner to get the maximum results! We'll decode the crazy Banner form names, show which Banner form to use for different processes, and shortcuts and tips to use Banner for searches and so much more!

#### **Learning Objectives:**

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  - **Rebecca Jones**, Assistant Director, Grants and Contracts Office
  - **Jason Bane**, Senior Business & Finance Coordinator, University Accounting and Financial Reporting
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#### ***EQUIPMENT MANAGEMENT FUNDAMENTALS: WHAT EVERY BUSINESS MANAGER NEEDS TO KNOW TO STAY IN COMPLIANCE***

This workshop will provide an overview of State and Federal regulations and compliance issues along with related University Equipment Management policies and procedures. You will receive tips and tools to better manage equipment inventory, avoid common problems, and prevent and detect errors and fraud.

#### **Learning Objectives:**

- Review the equipment management responsibilities of the Business Manager.
- Identify key regulations and policies related to Equipment Management.
- Examine helpful tips and tools for Inventory Management that can be applied to your department's processes.

#### **Presenter:**

- **Jeff Weaver**, Senior Associate Director, University Accounting and Financial Reporting

### ***USING THE RIGHT PURCHASING METHOD***

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#### **Learning Objectives:**

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#### **Presenters:**

- **Debi Barr-Holquist**, Contract Coordinator, Purchasing Office
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### ***WHAT'S NEW IN BUSINESS OBJECTS WEB INTELLIGENCE?***

The Business Objects upgrade is here! In fact, Business Objects was upgraded the weekend of March 13. EDDIE and Web Intelligence both have a new look and feel. This workshop will walk through the changes and highlight new features.

#### **Learning Objectives:**

- Introduce EDDIE and Web Intelligence users to the new features offered in the Business Objects upgrade.
- Describe the new navigation in EDDIE and Web Intelligence to EDDIE and Web Intelligence users.

#### **Presenter:**

- **Trish Curry**, Training Specialist, AITS

## 2015 Administrative Leadership Conference

### Workshop Session 4 – 3:00 p.m. – 4:15 p.m.

#### ***THE BRAIN AT WORK: CONVERSATIONS THAT DRIVE POSITIVE CHANGE***

Are you tired of trying to help your staff see how to improve their work performance or to embrace new ideas or changes in the workplace? Or you feel there must be a better way to have conversations that impact positive change? If you want dramatically different results then you need to have significantly different conversations. This workshop will provide you with an introduction to tools needed to achieve powerful improvements in your employees' performance through presenting unique and highly effective approaches to coaching and communicating.

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- **Toni Langdon**, Business Manager, Illinois Issues / Center Publications

***NAVIGATING THE DIFFERENT HR POLICIES FOR ACADEMIC PROFESSIONAL VS. CIVIL SERVICE EMPLOYEES***

Is there really a difference in how you apply policies to Academic Professional employees versus Civil Service employees? Is everyone eligible for overtime compensation? What kind of leave of absence options do I have?

Attend this workshop to get these questions answered as well as other information, such as:

- Differences between exempt and non-exempt employees
- Differences between Academic Professional, negotiated Civil Service, and open range Civil Service employees
- Leave of absence options beyond FMLA
- Reporting leave time appropriately

**Learning Objectives:**

- Compare the different policies for Academic Professional and Civil Service employees.
- Apply and track leave of absences appropriately.

**Presenters:**

- **Jami Painter**, Assistant Vice President for Human Resources, University Human Resources
- **Angela Foster**, Associate Director for Human Resources, University Human Resources

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