



2011 BUSINESS LEADERSHIP CONFERENCE

APRIL 6 AND 7, 2011

I HOTEL AND CONFERENCE CENTER

CHAMPAIGN, ILLINOIS

2011 Illinois Business Leadership Conference

Business Leadership at Illinois: Partnering to Meet New Challenges

April 6 and 7, 2011

I Hotel and Conference Center

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2011 Business Leadership Conference

ABOUT THE CONFERENCE

The theme for this year's conference is "Business Leadership at Illinois: Partnering to Meet New Challenges." The mission of the conference is to give you knowledge, resources, and networking opportunities to enable you to manage the challenges you face and pursue excellence in your role at the University.

GOALS

The primary goals of the conference are:

- to facilitate the sharing of best practices, new knowledge, tips, and tools that are relevant to business leaders and that can be passed to 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.

CONFERENCE SPONSORS

Office of the Chancellor

Office of the Provost

Office of Business and Financial Services

2011 Business Leadership Conference

PROGRAM SCHEDULE AT A GLANCE

Day One – Wednesday, April 6, 2011		
7:45 - 8:30	Registration / Continental Breakfast	Breakfast – Illinois Ballroom
8:30 - 8:45	Welcome and Opening Remarks Maxine Sandretto, Assistant Vice President for Business and Finance (OBFS)	Illinois Ballroom
8:45 - 9:00	Break	
9:00 - 10:15	Workshop Session 1	
	Current Issues in University Payroll and Benefits	Innovation Room
	Effort Reporting and Cost Sharing (Part 1)	Lincoln Room
	iBuy Tips and Best Practices	Technology Room
	Purchasing 101 (Part 1)	Chancellor’s Ballroom
	Sole Source Strategies	Humanities Room
	Top 10 Accounting Mistakes and How to Avoid Them	Quad Room
Travel Expense Management System Overview	Alma Mater Room	
10:15 - 10:30	Break	
10:30 - 11:45	Workshop Session 2	
	Activity Reporting System (ARS) – Beyond Checking the Boxes	Humanities Room
	Banner Finance and HR/Payroll Tips and Tricks	Quad Room
	Best Options for Expense Reporting and Analysis	Alma Mater Room
	Effort Reporting and Cost Sharing (Part 2)	Lincoln Room
	Fraud Awareness – A Deconstruct of Recent Fraud Cases	Innovation Room
	Purchasing 101 (Part 2)	Chancellor’s Ballroom
Suggestions for Unit Financial Management	Technology Room	
11:45 - 1:30	Networking Lunch	Illinois Ballroom
1:30 - 1:45	Break	
1:45 - 3:00	Workshop Session 3	
	Current Issues in University Payroll and Benefits	Innovation Room
	Effort Reporting and Cost Sharing (Part 1)	Lincoln Room
	iBuy Tips and Best Practices	Technology Room
	Purchasing 101 (Part 1)	Chancellor’s Ballroom
	Sole Source Strategies	Humanities Room
	Top 10 Accounting Mistakes and How to Avoid Them	Quad Room
Travel Expense Management System Overview	Alma Mater Room	
3:00 - 3:15	Break	
3:15 - 4:30	Workshop Session 4	
	Activity Reporting System (ARS) – Beyond Checking the Boxes	Humanities Room
	Banner Finance and HR/Payroll Tips and Tricks	Quad Room
	Best Options for Expense Reporting and Analysis	Alma Mater Room
	Effort Reporting and Cost Sharing (Part 2)	Lincoln Room
	Fraud Awareness – A Deconstruct of Recent Fraud Cases	Innovation Room
	Purchasing 101 (Part 2)	Chancellor’s Ballroom
Suggestions for Unit Financial Management	Technology Room	

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Day Two – Thursday, April 7, 2011		
8:00 - 8:30	Registration / Continental Breakfast	Breakfast - Illinois Ballroom
8:30 - 9:00	Chancellor's Address Robert Easter, Interim Chancellor	Illinois Ballroom
9:00 - 9:15	Break	
9:15 - 10:30	Workshop Session 5	
	Consolidated Faculty Analysis Product	Humanities Room
	Facilities and Administrative (F&A) Rate – A Glimpse Inside the Rate Calculation	Quad Room
	Motivating and Rewarding Staff in Turbulent Times	Alma Mater Room
	Overview of the Annual External Audit	Lincoln Room
	Procurement Communications Reporting – New Requirements	Chancellor's Ballroom
	Proposal Submission Guidance for Departmental Administrators	Innovation Room
	Requisition vs. Invoice Voucher – Which is the Right One?	Technology Room
10:30 - 10:45	Break	
10:45 - 12:00	Workshop Session 6	
	Consolidated Faculty Analysis Product	Humanities Room
	Facilities and Administrative (F&A) Rate – A Glimpse Inside the Rate Calculation	Quad Room
	Motivating and Rewarding Staff in Turbulent Times	Alma Mater Room
	Overview of the Annual External Audit	Lincoln Room
	Procurement Communications Reporting – New Requirements	Chancellor's Ballroom
	Proposal Submission Guidance for Departmental Administrators	Innovation Room
	Requisition vs. Invoice Voucher – Which is the Right One?	Technology Room
12:00 - 12:15	Conference Wrap Up	Illinois Ballroom

I HOTEL AND CONFERENCE CENTER MAP



WORKSHOP DESCRIPTIONS

DAY ONE – WEDNESDAY, APRIL 6, 2011

Session 1 – 9:00- 10:15

Session 3 – 1:45-3:00

CURRENT ISSUES IN UNIVERSITY PAYROLL AND BENEFITS (UPB)

This workshop will offer updates on the following topics:

- 403(b) and 457 plans (Social Security alternative / terminal benefit payouts)
- Retirees: Social Security and Medicare
- Mandatory direct deposit and electronic earnings statements (award payments)
- Substantial Presence Test (SPT) and how it affects benefit eligibility (what is SPT / health insurance requirements for foreign nationals before they take SPT / HRFE transactions and changes due to SPT)
- Overpayment service fee

Learning Objective:

- Become informed of UPB policies and procedures.

Presenters:

- **Jim Davito**, Director of Benefits, OBFS UPB Benefits Services
- **Brenda Butts**, Assistant Director, OBFS UPB Benefits Services
- **Carole Devaney**, Supervisor, OBFS UPB Benefits Services
- **Pam Hatton**, Payroll Manager, OBFS UPB Payroll
- **Don Smith**, Payroll Manager, OBFS UPB Payroll
- **Laura Barnett**, Assistant Director, OBFS UPB Payroll
- **Kassaundra Hester**, Associate Director, OBFS UPB Payroll

EFFORT REPORTING AND COST SHARING (PART 1 OF 2)

This workshop will provide guidance to departmental business leaders in understanding cost sharing, including what resources are appropriate and allowable for cost sharing commitments. Topics include a history of cost sharing, types and allowability of costs, and contributed effort. **(Please register for both part 1 and part 2.)**

Learning Objectives:

- Gain a better understanding of what cost sharing is and the types of cost sharing.
- Review the acceptable resources for cost sharing and the impact of volunteering University resources as cost sharing.
- Know the expectations of OSPRA and GCO Post-Award when cost sharing commitments are included in proposals and awards.

Presenters:

- **Jayne Goby**, Associate Director, OBFS Grants and Contracts Post-Award Office
- **Penny Weaver**, Assistant Director, Office of Sponsored Programs and Research Administration

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iBUY TIPS AND BEST PRACTICES

This workshop will provide information about how to use the iBuy system more effectively. Based on information received from service desk tickets, we will review areas that are most challenging to users. Also, we will include helpful tips to improve your shopping experience.

Learning Objectives:

- Set up a profile to ensure the accuracy of the requisition, including finding shipping addresses.
- Review enhanced search functionality to find suppliers and products.
- Use requisition history to locate returned requisitions and/or rejected purchase orders.

Presenters:

- **Barb Roemer**, Associate Director, Production Support, OBFS Business Information Systems
 - **Lauri Quick**, Senior Coordinator / Software Analyst, Production Support, OBFS Business Information Systems
 - **Cindy Dillman**, Director of Business Services, Vet Medicine Administration
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PURCHASING 101 (PART 1 OF 2)

In today's dynamic environment, departments are challenged to keep up-to-date with procurement processes and requirements. This workshop will focus on providing faculty and staff with the essential information needed for completing a successful University procurement. Learn and understand the process from the point of identifying a need to receipt and payment of the service or product. The formal presentation and question-and-answer period will involve areas of compliance that all departments should recognize and understand. **(Please register for both part 1 and part 2.)**

Learning Objectives:

- Understand the University processes to acquire goods and services from identification of need through payment.
- Identify existing compliance issues and how they affect the procurement timetable.
- Increase awareness of how handling potential issues up front results in a best business practice and a successful procurement.

Presenters:

- **Mike Devocelle**, Director, OBFS Contracts and Purchases
 - **Jim Martinie**, Director, OBFS University Payables
 - **Liz Clawson**, Associate Director for Business Operations, Applied Health Sciences Administration
 - **Ruth Boardman**, Associate Director for Compliance, OBFS Grants and Contracts Post-Award Office
 - **Jason McArthur**, Contract Coordinator, OBFS Purchasing
 - **Kandra Miller**, Corporate Card Coordinator, OBFS University Payables
 - **Mike Rudzinski**, Associate Director for Finance and Administration, NCSA
 - **Dan Szajna**, Contract Coordinator, OBFS Purchasing
 - **Megan Wells**, Systems Training and Support Specialist, OBFS Purchasing
 - **Cathy Young**, Travel Programs Coordinator, OBFS University Payables
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SOLE SOURCE STRATEGIES

With the current economic environment, as well as changes in the Illinois Procurement Code, sole source strategies can be contentious, but there are instances where a sole source procurement is the only option on the table. Join us to learn when it's appropriate to pursue a sole source strategy and follow the step-by-step process of a successful sole source procurement.

Learning Objectives:

- Understand when it is appropriate to use the sole source process for a procurement.
- Review the sole source justification form.
- Learn the timetable for successfully processing a sole source procurement.

Presenters:

- **Lisa Cunningham**, Procurement Specialist, OBFS Purchasing
 - **Kim Porter**, Contract Coordinator, OBFS Purchasing
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TOP 10 ACCOUNTING MISTAKES AND HOW TO AVOID THEM

Join the staff of University Accounting & Financial Reporting to learn our "Top 10" list of accounting mistakes. Discover what resources and step-by-step instructions are available to prevent these from occurring in your organization. A question and answer period will be available at the end of the session to ask your "how-to" questions.

Learning Objective:

- Improve efficiency by avoiding common accounting errors.

Presenters:

- **Jason Bane**, Business and Financial Coordinator, OBFS University Accounting and Financial Reporting
 - **Roger Wade**, Business and Financial Coordinator, OBFS University Accounting and Financial Reporting
 - **John Laroe**, Business and Financial Coordinator, OBFS University Accounting and Financial Reporting
 - **Amy Pendle**, Resource and Policy Analyst, OBFS University Accounting and Financial Reporting
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TRAVEL EXPENSE MANAGEMENT SYSTEM OVERVIEW

This workshop will offer an overview of the upcoming Travel Expense Management system, which will replace the paper employee reimbursement and miscellaneous vouchers.

Learning Objectives:

- Obtain an overview of the new Travel Expense Management system.
- Learn about the system's approval process.
- Find out the plans for the system's implementation and roll-out.

Presenters:

- **Sandra Ehler**, Executive Director, OBFS University Payables
 - **Steve Wiggs**, Director of Corporate Card Travel Management, OBFS University Payables
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DAY ONE – WEDNESDAY, APRIL 6, 2011

Session 2 – 10:30 – 11:45

Session 4 – 3:15 – 4:30

ACTIVITY REPORTING SYSTEM (ARS) – BEYOND CHECKING THE BOXES

Do you understand the data in the Activity Reporting System (ARS) and what it is used for? This system reflects data that is critical for campus profile, state reporting, capture of cost share for sponsored projects and drives much of the calculation of the Facilities and Administrative (F&A) rate for campus research. It is the source of full-time employee (FTE) detail used for many purposes. This workshop will focus on the “theory” of the system and goes beyond the Division of Management Information’s ARS training session content.

Learning Objectives:

- Understand the importance of ARS data as used for various processes and reports.
- Learn about interfaces of the ARS with other systems.
- Discover best practices for ARS use and data entry.

Presenters:

- **Julie Jarvis**, Senior Director, Office of Government Costing
 - **Carol Livingstone**, Associate Provost for Management Information, Office of the Provost and Vice Chancellor for Academic Affairs
 - **OBFS Grants and Contracts Post-Award Office**
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BANNER FINANCE AND HR/PAYROLL TIPS AND TRICKS

For the most part, we have all adjusted to Banner. But are there faster ways to get the information you need? Are there shortcuts to move through forms? What are the search options? And what do those form names mean? This workshop will introduce Banner users to aspects of the system that may still be untapped, and could very likely improve efficiency and reduce aggravation! **(This workshop will contain many topics presented during the 2009 conference workshop.)**

Learning Objectives:

- Obtain information about shortcuts, form naming conventions, queries, navigation, and other tips and tricks to help the user with Banner.
- Improve efficiency and decrease aggravation in the office by utilizing more features of Banner on a daily basis.

Presenters:

- **Wendy Harris**, Director of Budget and Resource Planning, Department of Mathematics
 - **Sherri Faith**, Assistant Director, OBFS University Accounting and Financial Reporting
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BEST OPTIONS FOR EXPENSE REPORTING AND ANALYSIS

We will compare and contrast existing expense reporting universes in the Data Warehouse. We will explain universe options available for various reporting needs. Also, we will highlight a new tool for trending expenditures, the *Expense Trends OLAP Cube in Excel*. Sample reports will be provided.

Learning Objectives:

- Provide a better understanding of the universes that contain expenses.
- Premiere expenditure analysis via Excel.
- Assist users in identifying the best tool(s) to use based on their needs.

Presenters:

- **Beth Ladd**, Assistant Director, Business Information, AITS
 - **Mark Pollard**, Functional Area Coordinator, AITS
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EFFORT REPORTING AND COST SHARING (PART 2 OF 2)

This workshop will provide guidance to departmental business leaders in understanding cost sharing, including what resources are appropriate and allowable for cost sharing commitments. Topics include a history of cost sharing, types and allowability of costs, and contributed effort. **(Please register for both part 1 and part 2.)**

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- **Jayne Goby**, Associate Director, OBFS Grants and Contracts Post-Award Office
 - **Penny Weaver**, Assistant Director, Office of Sponsored Programs and Research Administration
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FRAUD AWARENESS – A DECONSTRUCT OF RECENT FRAUD CASES

This workshop will share tips from recent fraud investigations on campus to assist in fraud awareness, detection, and prevention. We will talk about commonalities and differences in each fraud case, what difficulties were present in detecting the fraud, how the frauds were identified, and share tips from lessons learned.

Learning Objectives:

- Identify common fraud schemes that happen repeatedly and tips on what to review in your own unit.
- Recognize new fraud schemes and what changes might need to be made to traditional internal controls to prevent or detect fraud.

Presenters:

- **Darla Hill**, Director of Audits, Office of University Audits
 - **Carla Jones**, Enterprise-wide Auditor, Office of University Audits
 - **Teri Travis**, Enterprise-wide Auditor, Office of University Audits
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PURCHASING 101 (PART 2 OF 2)

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- **Mike Rudzinski**, Associate Director for Finance and Administration, NCSA
- **Dan Szajna**, Contract Coordinator, OBFS Purchasing
- **Megan Wells**, Systems Training and Support Specialist, OBFS Purchasing
- **Cathy Young**, Travel Programs Coordinator, OBFS University Payables

SUGGESTIONS FOR UNIT FINANCIAL MANAGEMENT

The workshop will discuss several topics that are important considerations in unit financial management, possibly including, but not limited to the nature of funding sources (e.g., recurring/non-recurring, restricted/unrestricted) and the implication for unit finances, evaluating unit-level financial sustainability, revenue and expense forecasts and trends, useful financial and operational management information sources, and unit-level financial reporting.

Learning Objective:

- Receive resources and information useful if involved with unit-level financial management.

Presenters:

- **Patrick Hoey**, Director, OBFS Budget Operations and Analysis
 - **Barbara Geissler**, Assistant Dean for Administration and Finance, College of Education
 - **Robert Kessler**, Assistant to the Head, Agricultural and Consumer Economics
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DAY TWO – THURSDAY, APRIL 7, 2011

Session 5 – 9:15-10:30

Session 6 – 10:45-12:00

CONSOLIDATED FACULTY ANALYSIS PRODUCT

Because faculty represent one of an academic college's most critical and valuable assets, senior decision makers in the academic colleges need an easier way to get integrated information about faculty activities across HR, Grants, Payroll, and Course Registration to support promotion and tenure decisions, evaluate research and teaching productivity, and ensure effective resource allocation. Decision Support's Faculty Analysis product provides a means to allow decision makers to quickly and easily explore and analyze their data from multiple perspectives without complex programming.

Learning Objectives:

- Receive an overview of available faculty-related data.
- View appropriate uses and live examples.

Presenter:

- **Beth Ladd**, Assistant Director, Business Information, AITS
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FACILITIES AND ADMINISTRATIVE (F&A) RATE – A GLIMPSE INSIDE THE RATE CALCULATION

Have you heard researchers complain about that nuisance “tax” or “fee” that takes dollars away from their important research work? And why don't they get all those F&A dollars back? After all, the University gets those dollars because of their projects, right? Come and learn more about what the F&A rate represents so that you can better respond when faced with such comments. This session will use the model for calculation of the FY12 rate proposal to show the basics of F&A rate components. It will also provide a glimpse into future rate setting for the FY12-15 rate period.

Learning Objectives:

- Understand the F&A rate calculation process and costs recovered through the rate.
- Assist faculty in understanding the types of costs recovered through the F&A rate.
- Learn about issues impacting the FY12-15 F&A rates.

Presenters:

- **Julie Jarvis**, Senior Director, Office of Government Costing
 - **Melanie Loots**, Associate Vice Chancellor for Research, Office of the Vice Chancellor for Research
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MOTIVATING AND REWARDING STAFF IN TURBULENT TIMES

A nationally-known model is used to frame a discussion on motivating and rewarding staff in turbulent times. Taken from the bestseller, *First Break All the Rules*, the authors reveal 12 questions managers must answer to attract, focus, and keep the most talented employees. The most current thoughts in rewarding and recognizing employees are shared to demonstrate you don't have to use monetary gifts or trips to the Caribbean to keep your employees satisfied.

Learning Objectives:

- Discover a basic yet powerful model/strategy that guides managers in coaching toward their employees' strengths, rather than expecting improvement in their weaknesses.
- Learn about four types of employee motivation and match them to your employees' motivational preferences.
- Share ways to provide no cost-low cost rewards and recognition that are appreciated, impactful, and keep your employees satisfied.

Presenters:

- **Sue Stewart**, Interim Director, The Center for Training and Professional Development
 - **Tiy Goddard**, Manager of Professional Development, The Center for Training and Professional Development
 - **Renee Lyell**, Manager of Marketing and Communications, The Center for Training and Professional Development
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OVERVIEW OF THE ANNUAL EXTERNAL AUDIT

This workshop will provide an overview of the University external audit conducted under the Illinois Office of the Auditor General. Information regarding all three sections of the audit (financial, state and federal compliance) will be presented.

Learning Objective:

- Understand the audit process and its importance.

Presenters:

- **Ginger Velazquez**, Executive Director for Business and Finance, Office of the Assistant Vice President for Business and Finance
 - **Janet Ford**, Assistant Controller, OBFS University Accounting and Financial Reporting
 - **Sandra Moulton**, Director, OBFS Grants and Contracts Post-Award Office
 - **Brent Rasmus**, Associate Director, OBFS University Accounting and Financial Reporting
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PROCUREMENT COMMUNICATIONS REPORTING – NEW REQUIREMENTS

Effective January 1, 2011, as a result of Senate Bill 51, University of Illinois employees are required to report, via a web-based tool, all written or oral communications with those outside the University that impart or request material information or make a material argument regarding potential action concerning a procurement matter. We will explore those communications that are exempt from reporting and those that require public reporting. Information will be provided regarding the latest reporting interpretations, JCAR rules, and system security and accessibility.

Learning Objectives:

- Develop a functional understanding of the reporting requirements.
- Learn how and where to access the reporting system.
- Identify where to obtain interpretative assistance.

Presenter:

- **Donna McNeely**, University Ethics Officer
-

PROPOSAL SUBMISSION GUIDANCE FOR DEPARTMENTAL ADMINISTRATORS

This workshop will provide you with tips and guidance that you can use to assist your faculty in preparing their applications for external funding. It will also help you to navigate through the proposal submission process and find out what OSPRA looks for during the proposal review process.

Learning Objectives:

- Gain a better understanding of the UIUC proposal submission process.
- Receive insight into what OSPRA considers during the proposal review process.
- Learn tips for proposal preparation.

Presenters:

- **Kimberly Walsh**, Coordinator, Office of Sponsored Programs and Research Administration
 - **Penny Weaver**, Assistant Director, Office of Sponsored Programs and Research Administration
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REQUISITION VS. INVOICE VOUCHER - WHICH IS THE RIGHT ONE?

Do you struggle with knowing when you should use a requisition and when you should use an invoice voucher? What happens to it when it leaves your office? Attending this session will shine some light on these mysteries. This workshop will provide some guidelines for use of each type of document and outline the workflow once it leaves your hands.

Learning Objective:

- Understand when to use a requisition and when to use an invoice voucher.

Presenters:

- **Janet Milbrandt**, Associate Director, OBFS Purchasing
 - **Darren Strater**, Assistant Director, OBFS University Payables
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