



# 2013 BUSINESS LEADERSHIP CONFERENCE

**MARCH 11 AND 12, 2013**  
**I HOTEL AND CONFERENCE CENTER**  
**CHAMPAIGN, ILLINOIS**

# 2013 Illinois Business Leadership Conference

## *Destination Success*

March 11 and 12, 2013

I Hotel and Conference Center  
1900 South First Street, Champaign, Illinois 61820

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## **2013 Business Leadership Conference**

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

The theme for this year's conference is "Destination Success." 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

## 2013 Business Leadership Conference

### *PROGRAM SCHEDULE AT A GLANCE*

Day One – Monday, March 11, 2013		
7:45 - 8:30	<b>Registration / Continental Breakfast</b>	Breakfast – Illinois Ballroom
8:30 - 8:45	<b>Welcome and Opening Remarks</b> Maxine Sandretto, Assistant Vice President for Business and Finance (OBFS) Mike Bass, Senior Associate Vice President for Business and Finance (OBFS)	Illinois Ballroom
8:45 - 9:00	<b>Break</b>	
9:00 - 10:15	<b>Workshop Session 1</b>	
	Banner Finance and HR Tips and Tricks	Lincoln Room
	Fund Accounting 101	Technology Room
	Managing the Work-Life Balance	Quad Room
	Marketing Your Unit with Social Media	Knowledge Room
	Payments to Foreign Nationals	Alma Mater Room
	State Requirements Related to Procurement Processes and Responsible Vendors (1 <sup>st</sup> Half)	Chancellor’s Ballroom
10:15 - 10:30	<b>Break</b>	
10:30 - 11:45	<b>Workshop Session 2</b>	
	Best Options for Expense Reporting and Analysis	Lincoln Room
	Career Development for Business Leaders: A Roundtable Discussion	Humanities Room
	Current Issues in Sponsored Projects Administration	Quad Room
	Focusing Your Internal Control Efforts	Technology Room
	Self-Supporting Funds, Tax Issues and Beyond	Innovation Room
	State Requirements Related to Procurement Processes and Responsible Vendors (2 <sup>nd</sup> Half)	Chancellor’s Ballroom
11:45 - 12:00	<b>Break</b>	
12:00 - 12:30	<b>Chancellor’s Address</b> Phyllis Wise, Chancellor	Illinois Ballroom
12:30 - 1:30	<b>Lunch</b>	
1:30 - 1:45	<b>Break</b>	
1:45 - 3:00	<b>Workshop Session 3</b>	
	Banner Finance and HR Tips and Tricks	Lincoln Room
	Fund Accounting 101	Technology Room
	Managing the Work-Life Balance	Quad Room
	Marketing Your Unit with Social Media	Knowledge Room
	Payments to Foreign Nationals	Alma Mater Room
	State Requirements Related to Procurement Processes and Responsible Vendors (1 <sup>st</sup> Half )	Chancellor’s Ballroom
3:00 - 3:15	<b>Break</b>	
3:15 - 4:30	<b>Workshop Session 4</b>	
	Best Options for Expense Reporting and Analysis	Lincoln Room
	Career Development for Business Leaders: A Roundtable Discussion	Humanities Room
	Current Issues in Sponsored Projects Administration	Quad Room
	Focusing Your Internal Control Efforts	Technology Room
	Self-Supporting Funds, Tax Issues and Beyond	Innovation Room
	State Requirements Related to Procurement Processes and Responsible Vendors (2 <sup>nd</sup> Half)	Chancellor’s Ballroom
3:00 - 3:15	<b>Break</b>	
3:15 - 4:30	<b>Workshop Session 4</b>	
	Best Options for Expense Reporting and Analysis	Lincoln Room
	Career Development for Business Leaders: A Roundtable Discussion	Humanities Room
	Current Issues in Sponsored Projects Administration	Quad Room
	Focusing Your Internal Control Efforts	Technology Room
	Self-Supporting Funds, Tax Issues and Beyond	Innovation Room
	State Requirements Related to Procurement Processes and Responsible Vendors (2 <sup>nd</sup> Half)	Chancellor’s Ballroom
	Travel and Expense Management (TEM) Update: Tips and Tricks	Alma Mater Room

## 2013 Business Leadership Conference

Day Two – Tuesday, March 12, 2013		
8:00 - 8:30	<b>Registration / Continental Breakfast</b>	Breakfast - Illinois Ballroom
8:30 - 9:00	<b>President's Address</b> <b>Robert Easter</b> , President	Illinois Ballroom
9:00 - 9:15	<b>Break</b>	
9:15 - 10:30	<b>Workshop Session 5</b> The Brain at Work: Conversations That Drive Positive Change	Lincoln Room
	Determining Benefit Eligibility and the Impact on Payroll	Knowledge Room
	Effort Reporting and Institutional Base Salary Discussion	Quad Room
	Opposites Attract... If You Understand Their Personality	Humanities Room
	Overview of the Illinois Contract System (iCS)	Alma Mater Room
	Payments to Students	Technology Room
	Service Center Rates – Update on Useful Tools That Assist Departments With Rate Calculations	Innovation Room
10:30 - 10:45	<b>Break</b>	
10:45 - 12:00	<b>Plenary Session: What's New on the State and National Scene?</b> <b>Randy Kangas</b> , Associate Vice President for Planning and Budgeting	Illinois Ballroom
12:00 - 1:30	<b>Networking Lunch</b>	Illinois Ballroom
1:30 - 1:45	<b>Break</b>	
1:45 - 3:00	<b>Workshop Session 6</b> The Brain at Work: Conversations That Drive Positive Change	Lincoln Room
	Determining Benefit Eligibility and the Impact on Payroll	Knowledge Room
	Effort Reporting and Institutional Base Salary Discussion	Quad Room
	Opposites Attract... If You Understand Their Personality	Humanities Room
	Overview of the Illinois Contract System (iCS)	Alma Mater Room
	Payments to Students	Technology Room
	Service Center Rates – Update on Useful Tools That Assist Departments With Rate Calculations	Innovation Room
3:00 - 3:15	<b>Break</b>	
3:15 - 4:30	<b>Keynote Address: Lessons from the Wheelhouse</b> <b>Cam Marston</b> , Generational Insights	Illinois Ballroom

*I HOTEL AND CONFERENCE CENTER MAP*



## *WORKSHOP DESCRIPTIONS*

### *DAY ONE – MONDAY, MARCH 11, 2013*

**Session 1 – 9:00 - 10:15**

**Session 3 – 1:45 - 3:00**

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

Are there faster ways to get the information you need from Banner? 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!

#### **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, Budget and Resource Planning, Department of Mathematics
  - **Sherri Faith**, Associate Director, OBFS 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.

#### **Presenters:**

- **Jason Bane**, Senior Business & Financial Coordinator, OBFS University Accounting and Financial Reporting
  - **Tim Parrish**, Financial Accounting & Reporting Analyst, OBFS University Accounting and Financial Reporting
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***MANAGING THE WORK-LIFE BALANCE***

Work-life balance is now the second most important driver of employee attraction and commitment, according to Corporate Executive Board research. In the current economic environment, employees are increasingly feeling stretched and stressed by the pull of work and home obligations. Lack of work-life balance is cited as a major stressor by workers. This workshop will help people gain some tools for getting back a sense of equilibrium between their professional and personal lives.

**Learning Objectives:**

- Identify what capsizes your boat and what keeps you afloat.
- Distinguish what work life balance is and what it is not.
- Appreciate the importance of self-care at home and at work.
- Discover twelve tips for regaining life balance.
- Receive additional resources for achieving work life balance.

**Presenter:**

- **Michele Guerra**, MS, CHES, Director, University of Illinois Wellness Center
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***MARKETING YOUR UNIT WITH SOCIAL MEDIA***

Organizations are developing an increased presence on the web through social media platforms. Would your unit benefit from social channels? Is your unit already using social media, but you aren't sure of its value? Do you wonder what best practices units should follow when developing a presence on **Facebook, Twitter, Pinterest**, or one of many other social media sites? This workshop will cover ways to have a dynamic presence on a social media platform to help get the word out on all the great things happening in your unit. Workshop attendees will see examples of social media use and benefits from campus, and will learn about upcoming social initiatives at the University of Illinois and elsewhere in the country.

**Learning Objectives:**

- Discover which social media platforms might be best for your unit.
- Hear how your unit can benefit from social media.
- Determine how to (and not to) manage social media.
- Receive tips and tricks.

**Presenters:**

- **Joel Steinfeldt**, Academic Brand Manager, Public Affairs
  - **Katie Blum**, Interim Senior Director, Annual Giving, University of Illinois Foundation
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***PAYMENTS TO FOREIGN NATIONALS***

This workshop will provide guidance to process payments to foreign nationals successfully.

**Learning Objectives:**

- Determine the intent of the payment.
- Determine eligibility to receive payment.
- Identify the process used to submit a payment request.

**Presenters:**

- **Denise Esworthy**, Assistant Payroll Manager, OBFS University Payroll & Benefits Services
  - **Kami Van Bellehem**, Payroll Specialist, OBFS University Payroll & Benefits Services
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***STATE REQUIREMENTS RELATED TO PROCUREMENT PROCESSES AND RESPONSIBLE VENDORS (PART 1 OF 2)***

**Part I** will focus on processes and problems related to normal procurement activities. Discussion will include roles and responsibilities of the various parties, drafting specifications, methods of source selection, issues with evaluation and contracting, plus related matters such as transparency and record-keeping.

**Part II** will focus on the elements that must be considered in determining whether a vendor is “responsible” under the requirements of the Illinois Procurement Code, the associated procurement rules and other laws. Much of the discussion will concentrate on Article 50, the Ethics Article of the Procurement Code, touching such topics as the anti-bribery certification to a more detailed discussion on conflicts of interest, financial disclosures, campaign contribution and prohibited assistance. This will include the restrictions imposed by the General Assembly on universities and agencies with a goal that we contract with clearly qualified vendors that are not ethically-challenged. This session will include time for questions and answers.

**Please Note:** *The State Requirements Related to Procurement Processes and Responsible Vendors morning workshop lasts from 9:00 to 11:45 and the afternoon workshop lasts from 1:45 to 4:30. If you are attending the morning workshop, you must register for both AM sessions. If you are attending the afternoon workshop, you must register for both PM sessions.*

**Learning Objective:**

- Examine the statutory and regulatory requirements necessary to meet university needs to result in better understanding what we all must do to address the requirements and meet the goal of the General Assembly with regard to contracting with clearly qualified vendors.

**Presenters:**

- **Ben Bagby**, Chief Procurement Officer for Higher Education
  - **Steve Rotello**, State Procurement Officer (Champaign-Urbana Campus)
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***UNDERSTANDING THE VISA PROCESS***

The University is currently home to over 1200 international faculty, staff and scholars. If your department hasn't navigated the visa process with a prospective visitor or employee yet, chances are you will need to soon! Come learn about visa statuses available for your international visitors, as well as general information about visa processes and timelines.

**Note:** This workshop is designed to provide general information only. It will not be a "how to" session, as International Student and Scholar Services (ISSS) offers specialized training for departmental liaisons who prepare visa requests.

**Learning Objective:**

- Gain an overview of the visa process and immigration statuses available to international faculty, staff and visitors at the University of Illinois.

**Presenters:**

- **Cheryl Hinkel**, Assistant Director, International Student and Scholar Services
  - **Briaunna Ponder**, Assistant Director, International Student and Scholar Services
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## 2013 Business Leadership Conference

*DAY ONE – MONDAY, MARCH 11, 2013*

**Session 2 – 10:30 – 11:45**

**Session 4 – 3:15 – 4:30**

### ***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. We will highlight a tool for trending expenditures, the Expense Trends OLAP Cube in Excel. Additionally, AITS and OBFS are commencing a project to review the Finance standard reports. Part of the workshop will include an interactive assessment of existing standard reports.

#### **Learning Objectives:**

- Provide a better understanding of the universes that contain expenses.
- Review expenditure analysis via Excel and the Expense Trends cube.
- Assist users in identifying the best tool(s) to use based on their needs.
- Participate in assessment of existing reports.
- Identify the future direction for report distribution of standard finance reports.

#### **Presenter:**

- **Mandy Bodine**, Functional Area Coordinator, Decision Support, Administrative Information Technology Services

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### ***CAREER DEVELOPMENT FOR BUSINESS LEADERS: A ROUNDTABLE DISCUSSION***

This workshop will provide you an opportunity to participate in a discussion about a career development program for business leaders on this campus. What would make such a program a success? How should it be structured? Who should be the target group to participate and how would they be selected?

#### **Learning Objectives:**

- Learn about possibilities for a career development program for business managers on this campus.
- Contribute your ideas for a successful program.

#### **Presenters:**

- **Mike Andrechak**, Associate Chancellor and Vice Provost, Budgets and Resource Planning
  - **Maxine Sandretto**, Assistant Vice President for Business and Finance, Office of Business and Financial Services (**Facilitator**)
-

***CURRENT ISSUES IN SPONSORED PROJECTS ADMINISTRATION***

The workshop will provide an update on recent highlights and topics of interest related to sponsored project administration, including but not limited to PHS FCOI (one year later), NSF policy revisions, proposed OMB reforms, and more.

**Learning Objective:**

- Receive updates on sponsored project administration issues.

**Presenters:**

- **Linda Learned**, Interim Director / Associate Director, Office of Sponsored Programs and Research Administration
  - **Sandra Moulton**, Senior Director, OBFS Grants and Contracts
- 

***FOCUSING YOUR INTERNAL CONTROL EFFORTS***

This workshop is designed to cover common and newly identified internal control weaknesses and ways to assess and address those within your unit. We will walk through the concepts of risk assessment for internal control activities using some case study material.

**Learning Objectives:**

- Assess your unit's internal controls against the most common internal control weaknesses.
- Evaluate your unit's internal controls against new internal control issues as identified in the most recent internal audits.
- Apply a risk assessment methodology on the current internal control activities within your unit.

**Presenters:**

- **Darla Hill**, Director, Office of University Audits
  - **Ryan Holmes**, Enterprise-Wide Auditor, Office of University Audits
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***SELF SUPPORTING FUNDS, TAX ISSUES AND BEYOND***

Is your self-supporting fund required to collect sales tax? Is it subject to Unrelated Business Income Tax (UBIT)? What is deferred income and why is it important to track? Attend this workshop to find out the answer to these questions and much more!

**Learning Objectives:**

- Identify when a self-supporting fund is required to collect sales tax.
- Recognize when a self-supporting fund is subject to UBIT.
- Review year-end reporting requirements.

**Presenters:**

- **Roger Fredenhagen**, Business & Financial Specialist, OBFS University Accounting and Financial Reporting
  - **Michelle Flack**, Financial Accounting & Reporting Analyst, OBFS University Accounting and Financial Reporting
  - **Nikki Melander**, Financial Accounting & Reporting Analyst, OBFS University Accounting and Financial Reporting
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**STATE REQUIREMENTS RELATED TO PROCUREMENT PROCESSES AND RESPONSIBLE VENDORS (PART 2 OF 2)**

**Part I** will focus on processes and problems related to normal procurement activities. Discussion will include roles and responsibilities of the various parties, drafting specifications, methods of source selection, issues with evaluation and contracting, plus related matters such as transparency and record-keeping.

**Part II** will focus on the elements that must be considered in determining whether a vendor is “responsible” under the requirements of the Illinois Procurement Code, the associated procurement rules and other laws. Much of the discussion will concentrate on Article 50, the Ethics Article of the Procurement Code, touching such topics as the anti-bribery certification to a more detailed discussion on conflicts of interest, financial disclosures, campaign contribution and prohibited assistance. This will include the restrictions imposed by the General Assembly on universities and agencies with a goal that we contract with clearly qualified vendors that are not ethically-challenged. This session will include time for questions and answers.

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**Learning Objective:**

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**Presenters:**

- **Ben Bagby**, Chief Procurement Officer for Higher Education
- **Steve Rotello**, State Procurement Officer (Champaign-Urbana Campus)

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**TRAVEL AND EXPENSE MANAGEMENT (TEM) UPDATE: TIPS AND TRICKS**

This workshop will provide an update on working with the University’s new Travel and Expense Management (TEM) system. Included will be best practices regarding system set up, roles within the system, the approval processes, system functionality and processes. Also covered will be information for working with the travel card. You will be able to submit questions in advance of the workshop.

**Learning Objectives:**

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

**Presenters:**

- **Darren Strater**, Associate Director, OBFS University Payables
  - **Kandra Miller**, Assistant Director, OBFS University Payables
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**DAY TWO – TUESDAY, MARCH 12, 2013**

**Session 5 – 9:15 - 10:30**

**Session 6 – 1:45 - 3:00**

***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. The presentation will provide leaders, managers and supervisors with 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:**

- **Dave Byers**, Associate Director for Performance Development, OBFS Training, Performance Development, Communications, and Policy

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***DETERMINING BENEFIT ELIGIBILITY AND THE IMPACT ON PAYROLL***

This workshop will present the State Department of Central Management Services' benefit eligibility requirements including how foreign national tax status affects eligibility.

**Learning Objective:**

- Review the impact of benefit eligibility requirements.

**Presenters:**

- **Carole Devaney**, Benefits Manager , OBFS University Payroll & Benefits Services
  - **Denise Esworthy**, Assistant Payroll Manager, OBFS University Payroll & Benefits Services
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***EFFORT REPORTING AND INSTITUTIONAL BASE SALARY DISCUSSION***

This workshop will provide a case study and related information regarding discussions underway on the Urbana campus to determine policies and procedures for establishing a definition of institutional base salary, effort tracking and reporting. Representatives of the committee, which is being chaired by Maxine Sandretto, will provide information along with requesting your input and comments.

**Learning Objectives:**

- Review current compensation and faculty personnel budgeting practices across the campus and the associated risks.
- Receive a comprehensive understanding of how the University's Activity Reporting System impacts other university issues, including the calculation of the F&A rate.
- Recognize the impact of these functions and practices on grant budgeting and administration, faculty compensation and audit risk.

**Panel Discussion Led By:**

- **Maxine Sandretto**, Assistant Vice President for Business and Finance, Office of Business and Financial Services
- **Barb Geissler**, Executive Assistant Dean, College of Education

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***OPPOSITES ATTRACT...IF YOU UNDERSTAND THEIR PERSONALITY***

Effective communication in the workplace takes understanding, determination, and above all patience. Tools such as the *DiSC Personality Profile* assist you in understanding and flexing your personality style to work productively with others. Special emphasis is placed on strategies to work effectively with your most opposite style.

**Learning Objectives:**

- Examine the 4 *DiSC Personality Profile Styles*, how they relate to the workplace, where you fit, and how to flex your style to create productive relationships.
  - Dominance (Get it done)
  - Influence (Get Recognition)
  - Conscientiousness (Get it Right)
  - Steadiness (Get Along)
- Create strategies to work effectively with all personalities – especially your direct opposite boss, co-workers, customers, family, and friends - by using scenarios, short case studies, and role plays.

**Presenters:**

- **Sue Stewart**, Director, Center for Training and Professional Development
  - **Tiy Goddard**, Manager, Professional Development, Center for Training and Professional Development
  - **Renee Lyell**, Manager, Marketing & Communications, Center for Training and Professional Development
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***OVERVIEW OF THE ILLINOIS CONTRACT SYSTEM (ICS)***

You've heard about it, now see it in action! OBFS will present an overview of the new Illinois Contract System, known as iCS. This will include highlights of the system, its functionality, and possibly include representatives from Urbana campus pilot units to share their iCS implementation experiences.

**Learning Objectives:**

- Define what iCS is and how it will be used.
- Review the unit implementation process, including training, security, and technical requirements.
- Receive suggestions from units already live in iCS on the best way to prepare your unit for go live.

**Presenters:**

- **Danny Lienard**, Assistant Director, OBFS Purchasing
  - **Nicole Stewart**, Assistant Director, Business and Finance, OBFS
  - **Sara Williamson**, Senior Coordinator, University Contract Records, OBFS
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***PAYMENTS TO STUDENTS***

This workshop will provide information about the various types of student payments that are made at the University and how those payments should be processed to ensure compliance with tax reporting and financial aid requirements. The panel discussion will include current processing methods and proposed changes that will broaden the use of the DAWS (financial aid) system for all student payments other than reimbursements and non-qualified Foreign National Payments.

**Learning Objectives:**

- Identify the current processing requirements for various types of student payments.
- Learn about the proposed new DAWS processing for student payments.

**Presenters:**

- **Christy Devocelle**, Associate Vice President for Accounting and Gift Administration, U of I Foundation
  - **Sandy Ehler**, Executive Director, OBFS University Payables
  - **John Hockersmith**, Associate Director, OBFS University Student Financial Services and Cashier Operations
  - **Dan Mann**, Director, Student Financial Aid
  - **Erin Rosenthal**, Senior Student Financial Aid Administrator
  - **Terry Thompson**, University Director of Tax
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***SERVICE CENTER RATES – UPDATE ON USEFUL TOOLS THAT ASSIST DEPARTMENTS WITH RATE CALCULATIONS***

The calculation of service center (3E fund types) rates can be very challenging for units with limited resources and staff. However, the consequences of improper calculations can come in the form of unallowed costs to sponsored projects or potential audit findings and penalties. The Office of Government Costing routinely provides training on proper rate calculations as part of the OBFS training program. However, this workshop will focus on useful tools and checklists that have proven helpful to campus units. During this workshop, we will also cover common questions asked by campus units and dispel myths related to service center rate calculations.

**Learning Objective:**

- Identify the tools available to units/departments for performing service center rate calculations.

**Presenter:**

- **Shelly Benson**, Associate Director, Office of Government Costing
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