



2015 BUSINESS LEADERSHIP CONFERENCE

MARCH 9 AND 10, 2015

I HOTEL AND CONFERENCE CENTER

CHAMPAIGN, ILLINOIS

2015 Illinois Business Leadership Conference

A Shared Vision

March 9 and 10, 2015

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

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ABOUT THE CONFERENCE

The theme for this year's conference is "A Shared Vision." 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 and Vice Chancellor for Academic Affairs

Office of the Assistant Vice President for Business and Finance (OBFS)

2015 Illinois Business Leadership Conference

PROGRAM SCHEDULE AT A GLANCE

Day One – Monday, March 9, 2015 Full Conference Workshops		
7:45 - 8:15	Registration / Breakfast	Breakfast – Illinois Ballroom
8:15 - 8:45	Welcome and Opening Remarks Ginger Velazquez, Interim Assistant Vice President for Business and Finance Phyllis Wise, Chancellor	Illinois Ballroom
8:45 - 9:00	Break	
9:00 - 10:15	Breakout Workshop 1 Best Practices for Self-Supporting and Agency Funds	Alma Mater Room
	Collaborative Conversations	Innovation Room
	Current Issues in Sponsored Projects & Administration	Lincoln Room
	Equipment Management FUNdamentals: What Every Business Manager Needs to Know to Stay in Compliance	Loyalty Room
	Fraud Awareness in Higher Education	Humanities Room
	Purchasing Overview of Small Dollar Purchases	Technology Room
10:15 - 10:30	Break	
10:30 - 11:45	Breakout Workshop 2 Best Practices for Self-Supporting and Agency Funds	Alma Mater Room
	Collaborative Conversations	Innovation Room
	Current Issues in Sponsored Projects & Administration	Lincoln Room
	Equipment Management FUNdamentals: What Every Business Manager Needs to Know to Stay in Compliance	Loyalty Room
	Fraud Awareness in Higher Education	Humanities Room
	Purchasing Overview of Solicitations	Technology Room
11:45 – 12:45	Lunch	Illinois Ballroom
12:45 – 1:45	What’s New on the State and National Scene Randy Kangas, Associate Vice President for Planning and Budgeting	Illinois Ballroom
1:45 - 3:00	Breakout Workshop 3 Academic Unit Budget Resources and Allocation: Round Table Discussion	Lincoln Room
	Focusing Your Internal Control Efforts	Alma Mater Room
	Let’s Explore the New U of I Financial Report Distribution Tool	Chancellor Ballroom
	Payments to Foreign Nationals	Loyalty Room
	Presentation by Center for Wellness: Reducing Stress by Taming Your Mind	Humanities Room
	Uniform Guidance	Technology Room
3:00 - 3:15	Break	
3:15 - 4:30	Breakout Workshop 4 Academic Unit Budget Resources and Allocation: Round Table Discussion	Lincoln Room
	Focusing Your Internal Control Efforts	Alma Mater Room
	Let’s Explore the New U of I Financial Report Distribution Tool	Chancellor Ballroom
	Payments to Foreign Nationals	Loyalty Room
	Presentation by Center for Wellness: Reducing Stress by Taming Your Mind	Humanities Room
	Uniform Guidance	Technology Room
4:30 – 5:30	OBFS Meet & Greet	Illinois Ballroom

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Day One – Monday, March 9, 2015 Beginner Track Workshops		
1:00 – 1:10	Opening Remarks	Innovation Room Knowledge Room
1:10 – 2:10	Banner Tips & Tricks	Innovation Room
	Processing Payments Properly	Knowledge Room
2:15 – 3:15	Contracts 101	Innovation Room
3:15 – 3:30	Break	
3:30 – 4:30	Fund Accounting 101	Innovation Room
	iBuy Tips & Tricks	Knowledge Room
4:30 – 5:30	OBFS Meet & Greet	Illinois Ballroom

Day Two – Tuesday, March 10, 2015 Full Conference Workshops		
8:30 – 9:15	Registration / Breakfast	Illinois Ballroom
9:15 – 10:30	Breakout Workshop 5	
	Effort Reporting and Institutional Base Salary Discussion	Alma Mater Room
	Healthy Eating on the Go	Innovation Room
	Illinois Contract System (iCS) Tips & Tricks	Knowledge Room
	OneNote for All Your Note Taking Needs	Technology Room
	Success in Making Human Subject Payments	Humanities Room
	What's New in Business Objects Web Intelligence	Quad Room
10:30 – 10:45	Break	
10:45 – 12:00	Communicating and Leading Across the Generations Tim Moore , Generational Insights	Illinois Ballroom

I HOTEL AND CONFERENCE CENTER MAP



FULL CONFERENCE WORKSHOP DESCRIPTIONS

DAY ONE – MONDAY, MARCH 9, 2015

Workshop 1 – 9:00 – 10:15

Workshop 2 – 10:30 – 11:45

BEST PRACTICES FOR SELF-SUPPORTING AND AGENCY FUNDS

For business managers who work with self-supporting and/or agency funds, join University Accounting and Financial Reporting to discuss best practices as it relates to these fund types. Discussions will focus on the differences between these funds, reporting requirements for self-supporting funds, and agency fund policy.

Learning Objectives:

- Understand the difference between self-supporting and agency funds.
- Learn about the new policy relating to agency funds.
- Discuss best practices related to self-supporting funds.

Presenter:

- **Roger Fredenhagen**, Self-Supporting and Financial Analysis Coordinator, University Accounting and Financial Reporting
- **Michelle Flack**, Financial Accounting and Reporting Analyst, University Accounting and Financial Reporting
- **Bridget To**, Financial Accounting and Reporting Analyst, University Accounting and Financial Reporting

COLLABORATIVE CONVERSATIONS

Collaborative Conversations, a highly interactive workshop, combines the best ideas from neuroscience and communication leaders, and is appropriate for all audiences. The workshop investigates ways to create a mutually desired future by making better choices through shared decision-making, and encourages people to take responsibility for what they create together. Effective communication requires recognizing that how people talk is just as important, if not more important, than the topic they are discussing. To better understand and work together we create conditions where we explore challenging and complex issues. We design conversations that:

- Foster trust and accountability among all stakeholders.
- Encourage and support diverse perspectives and thinking.
- Bring attention to what we create when we are together.
- Use divergence and dissent to open new possibilities.

Resources and job aids are provided to support conversations that are not just transactional but transformational.

Learning Objectives:

- Recognize potential triggers that can put others in a fight, flight, or freeze mode.
- Learn how to move from an I-focus to a We-focus by changing the questions you ask and the approach you use.
- Apply the principles of effective conversations that create greater understanding and build better relationships.

Presenter:

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

CURRENT ISSUES IN SPONSORED PROJECTS AND ADMINISTRATION

Attendees will learn about current and emerging issues at the national and State level related to sponsored projects from both the pre-award and post-award perspectives. Specific Federal and State agencies will be highlighted.

Learning Objectives:

- Receive up-to-date information about national and State topics of interest related to sponsored project administration that will aid workshop participants in performing their research administration job duties.
- Receive information related to specific agencies.

Presenters:

- **Charles Alsbury**, Assistant Director of Audit and Compliance, Grants and Contracts Office
- **Sarah Lorbiecki**, Assistant Director of NSF Awards, Grants and Contracts Office
- **Presenter** from the Office of Sponsored Programs

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.

Presenters:

- **Jeff Weaver**, Senior Associate Director, University Accounting and Financial Reporting
- **Marti Conrad**, Financial Accounting and Reporting Analyst, University Accounting and Financial Reporting
- **Cheryl Dodge**, Account Technician III, University Accounting and Financial Reporting
- **Tosha Waller-Mumm**, Assistant Director, Closeout and Award Management, Grants and Contracts Office

FRAUD AWARENESS IN HIGHER EDUCATION

This workshop will focus on some fraud scenarios that occur inside higher education in order to provide all attendees with a basic awareness of how fraud can occur and common internal control weaknesses.

This will be a formal presentation and will be targeted for any level of attendee.

Learning Objectives:

- Learn about common fraud scenarios in higher education.
- Learn how these common fraud scenarios occur within our specific environment.
- Learn about the correlation of common red flags to the most common frauds.
- Learn how fraud and internal controls relate.
- Learn where to start when you have fraud concerns.

Presenters:

- **Darla Hill**, Director, Office of University Audits
 - **Jill Verdeyen**, Enterprise Wide Auditor, Office of University Audits
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PURCHASING OVERVIEW OF SMALL DOLLAR PURCHASES—WORKSHOP 1

This workshop will provide an overview of the small dollar purchasing and mechanisms available.

Presenters:

- **Brad Henson**, Associate Director, Urbana Purchasing
- **Teri Merrell**, Contract Coordinator, Urbana Purchasing

Facilitators:

- **Janet Milbrandt**, Director, Urbana Purchasing
 - **Justin Johnston**, Associate Director, Urbana Purchasing
 - **Jay Simpson**, Senior Contract Coordinator, Urbana Purchasing
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PURCHASING OVERVIEW OF SOLICITATIONS—WORKSHOP 2

This workshop will provide an overview of the solicitation process

Presenters:

- **Justin Johnston**, Associate Director, Urbana Purchasing
- **Jay Simpson**, Senior Contract Coordinator, Urbana Purchasing

Facilitators:

- **Janet Milbrandt**, Director, Urbana Purchasing
 - **Brad Henson**, Associate Director, Urbana Purchasing
 - **Teri Merrell**, Contract Coordinator, Urbana Purchasing
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DAY ONE – MONDAY, MARCH 9, 2015

Workshop 3 – 1:45 – 3:00

Workshop 4 – 3:15 – 4:30

ACADEMIC UNIT BUDGET RESOURCES AND ALLOCATION: ROUND TABLE DISCUSSION

Budget and resource allocation policies and practices associated with college level budget plans are complex and vary significantly among academic units. This workshop will feature a senior panel of campus and academic unit budget leaders who will be available to discuss areas including funding allocation methodologies, budget cut approaches, and best practices for promoting long term unit financial stability. This is a panel discussion with a focus on attendee participation and engagement. Specific questions will be requested from registered attendees in advance of the panel discussion and will be given top priority. Any other questions will be addressed as time permits. Come prepared to engage and learn from your peers across the academic unit spectrum.

Learning Objectives:

- To participate and share in a collaborative discussion on current academic unit budget allocation and resource issues.
- Understand the ways in which budgeting practices are similar and divergent across campus units.

Presenters:

- **Suzanne Rinehart**, Budget Director and Assistant Vice Provost, OBFS Budget Office
- **Susan Elliott**, Associate Dean of Administration, College of Business
- **Barbara J. Geissler**, Executive Assistant Dean of Business Operations, College of Education
- **William G. Goodman**, Assistant Dean for Administration and Technology, College of Applied Health Sciences
- **Patrick Hoey**, Director of Budget and Resource Planning, College of Liberal Arts and Sciences
- **John Lockmiller**, Executive Assistant Dean for Administration, College of Agricultural, Consumer and Environmental Sciences
- **Brandy Meid**, Assistant Dean for Administration, College of Engineering

FOCUSING YOUR INTERNAL CONTROL EFFORTS

This workshop will focus on covering the basic and primary internal controls that should be implemented within the unit for each of the University's business cycles.

This workshop will consist of a formal presentation and brainstorming workshop and will be targeted for any level of attendee.

Learning Objectives:

- Learn about the critical controls within the University's general business cycles (for example, self-supporting, gifts, payroll).
- Learn about the most common weaknesses noted in University internal audits.
- Learn tips in assessing various control options when resources are limited within one of these areas.

Presenters:

- **Carla Jones**, Enterprise-Wide Auditor, Office of University Audits
 - **Teri Travis**, Enterprise Wide Auditor, Office of University Audits
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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 and Financial Reporting and Grants and 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:

- Understand 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
 - **Scott Morris**, Associate Director, School of Earth, Society and Environment
-

PAYMENTS TO FOREIGN NATIONALS

This presentation will provide guidance for processing payments to foreign nationals successfully.

Learning Objectives:

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

Presenters:

- **Kelly Sellers**, Assistant Payroll Manager, University Payroll & Benefits Services
 - **Kami Van Bellehem**, Payroll Specialist, University Payroll & Benefits Services
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PRESENTATION BY THE CENTER FOR WELLNESS: REDUCING STRESS BY TAMING YOUR MIND

This workshop will provide participants with the basics of stress management. Participants will build awareness of their ability to control how stress affects them, and how to address stress. The program is very interactive; participants will be taught practical skills that they can use in their daily lives.

Learning Objectives:

- Understand how your perceptions and thoughts impact your stress level.
- Learn to identify and stop distressing thoughts when they occur.
- Discover how to replace distressing thought patterns with stress reducing thought patterns.
- Practice an affirmation technique.

Presenters:

- **Michele Guerra**, Director, Center for Wellness
-

UNIFORM GUIDANCE

We will provide an update on the status of the Uniform Guidance. Included will be significant changes, status of technical corrections, and Research Terms and Conditions. Guidance will be given on exceptions granted to specific Federal Agencies.

Learning Objectives:

- Receive up-to-date information related to the changes in Federal Regulations as related to Uniform Guidance.
- Receive information on where to find Uniform Guidance and tools to assist in grant administration.
- Receive an outline of the hot topics related to Uniform Guidance.

Presenters:

- **Ruth Boardman**, Associate Director, Grants and Contracts Office
 - **Linda Learned**, Associate Director, Office of Sponsored Programs
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BEGINNER TRACK WORKSHOP DESCRIPTIONS

DAY ONE – MONDAY, MARCH 9, 2015

1:00 to 4:30

BANNER TIPS & 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.
- Know the correct Banner form to use for different processes.

Presenters:

- **Jason Bane**, Senior Business and Financial Coordinator, University Accounting and Financial Reporting
- **Sherri Faith**, Associate Director, University Accounting and Financial Reporting
- **Matt Murphy**, Assistant Director, NIH Awards Grants and Contracts Office, Post-Award
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CONTRACTS 101

This workshop will cover all the basic information that a user new to processing contracts on the Urbana campus needs to know. Topics will include basic contract elements, forms and templates, contract routing and execution, and will introduce users to the Illinois Contract System (iCS).

Learning Objectives:

- Inform users new to working with University contracts with the basic information they need to initiate and route a contract.
- Provide information about additional resources related to contract processing.

Presenters:

- **Julie Townsend**, Coordinator of University Contracts, Contract Services Office
 - **Danny Lienard**, Assistant Director, Urbana Purchasing
-

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 and 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:

- **Jason Bane**, Senior Business and Financial Coordinator, University Accounting and Financial Reporting
 - **Tim Parrish**, Financial Accounting and Reporting Analyst, University Accounting and Financial Reporting
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iBUY TIPS & TRICKS

This workshop covers iBuy best practices, helpful hints, and tricks. We will review solutions detailed in our frequently asked questions (FAQs) and discuss our top service desk requests. Also, we will provide an overview of available training and highlight features of the upcoming iBuy release available at the end of March 2015.

Learning Objectives:

- Identify iBuy frequently asked questions and solutions.
- Find and complete the Service Request Form.
- Locate the iBuy website and training resources.

Presenters:

- **Jeannine Reese**, Associate Applications Analyst, AS Business Information Systems
 - **Tyler Tanaka**, Instructional Designer, AS Training, Performance Development, Communications and Policy
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PROCESSING PAYMENTS PROPERLY

This workshop will cover how to determine the proper process/method for payments and how to use the available systems and tools to accomplish the desired transaction most efficiently.

Learning Objectives:

- Provide newer employees with a basic background of the payment process at the University of Illinois.
- Share and discuss existing University resources (websites, job aids, etc.) that provide instructions and guidance needed to initiate and conduct a transaction.
- Provide a Q&A session to discuss specific examples of situations.

Presenters:

- **Kandra Miller**, Assistant Director, University Payables, Procurement Services
 - **Tammy Ziegler**, Business Administrative Associate, University Payables, Procurement Services
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FULL CONFERENCE WORKSHOP DESCRIPTIONS

DAY TWO – TUESDAY, MARCH 10, 2015

Workshop 5 – 9:15 – 10:30

EFFORT REPORTING AND INSTITUTIONAL BASE SALARY DISCUSSION

This workshop will provide guidance on how to ensure that the effort you have committed to a sponsored project is appropriately recorded in University systems.

Learning Objectives:

- Review Institutional Base Salary Definition and proposed CAM Effort Policy.
- Discuss the University’s Activity Reporting System and its role in recording effort.
- When does effort become cost sharing and discuss how that is tracked and reported.

Presenters:

- **Jayne Goby**, Associate Director, Grants and Contracts Office
- **Linda Gregory**, Associate Director, Grants and Contracts Office
- **Liz Stern**, Associate Director, Division of Management Information
- **Lori Willoughby**, Executive Director of Engineering Human Resources
- **Sandy Jones**, Associate Director, Office of Academic Human Resources

HEALTHY EATING ON THE GO

Learn the best strategies to stick to your healthy diet goals when out to eat, traveling for business, or just trying to get through a hectic workday. From planning low-cal lunches to using your smartphone to stay on track, pick up simple tips, tricks, and “life hacks” to make the healthy choice the easy choice.

Learning Objectives:

- Learn how productivity, energy levels, and appetite relate to healthy eating.
- Identify proper portion sizes for different food groups.
- Receive examples of snacks with the proper protein : carbohydrate ratio
- Discover websites and other sources for healthy meal ideas.
- Identify lower-calorie menu items.
- Identify healthier menu substitutions.
- Use smartphone apps to track diet and physical activity.
- Receive examples of behavioral modification techniques that can be used to support a healthy lifestyle.

Presenter:

- **Leia Kedem**, Registered Dietician, University of Illinois Extension

ILLINOIS CONTRACT SYSTEM (iCS) TIPS AND TRICKS

This workshop will provide an update for users of the Illinois Contract System (iCS). Included will be tips and best practices regarding user set up, contract development, routing, approval and signature processes, searching and reporting. You will be able to submit questions in advance of the workshop.

Learning Objectives:

- Discuss best practices for using iCS.
- Improve efficiency and decrease frustration by learning more about iCS features and navigation.

Presenters:

- **Jennifer Erickson**, Contract Coordinator, OBFS University Contract Records Office
 - **Hanna Richmond**, Coordinator of University Contract Programs and Resources, OBFS Urbana AVP Office
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ONENOTE FOR ALL YOUR NOTE TAKING NEEDS

Is your monitor covered in Post-It Notes? Are you always looking for that piece of paper with your meeting notes? Do you wish there was a way to keep everything in one place and easy to find?

Come to this workshop to learn how OneNote can help you keep everything in order in one, central, easy-to-search system. In this workshop, you will learn how to take notes during a Lync phone call with one keyboard click; how to take automatic attendance of conference calls; how to organize a project in one place; import files to OneNote; send Outlook tasks to yourself from OneNote that link up with your OneNote notes; and much, much more. You'll wonder how you ever survived without it!

Learning Objectives:

- Understand the fundamentals of how to set up and use OneNote.
- Understand how OneNote can work in conjunction with other Microsoft Office products.

Presenter:

- **Stacey Ballmes**, Coordinator of University Contracts, Contract Services Office
-

SUCCESS IN MAKING HUMAN SUBJECT PAYMENTS

This workshop will compare different types of payment options available to researchers and their departmental support staff in conducting human subject research. Newer options such as electronic gift cards and micro-payments (i.e., Mechanical Turk) from Amazon.com will be discussed along with traditional options such as cash incentives and plastic gift cards. We'll also provide first-person accounts of how the newer payment technologies are being successfully used for a wide variety of research studies at UIUC.

Learning Objectives:

- Understand the human subject payment options available to departments and PIs and how to choose among them.
- Become familiar with the many different and often conflicting compliance requirements affecting human subject research (e.g., IRB, IRS, OBFS units, Internal Audit).
- Be able to assist faculty in choosing payment mechanisms to enhance their research efforts and improve participant satisfaction.

Presenters:

- **Steven Gangloff**, Director of Cash Management, Treasury Operations
 - **Marc Henkel**, Director of Merchant Card Services, Treasury Operations
 - **Dr. Leanne Knobloch**, Professor of Communications
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WHAT'S NEW IN BUSINESS OBJECTS WEB INTELLIGENCE

The Business Objects upgrade is just around the corner. In fact, Business Objects will be upgraded the weekend of March 13. EDDIE and Web Intelligence will have a new look and feel. This workshop will walk through the changes you can expect and highlight new features.

Learning Objectives:

- Familiarize EDDIE and Web Intelligence users of the new features offered in the Business Objects upgrade.
- Familiarize EDDIE and Web Intelligence users of the new navigation in EDDIE and Web Intelligence.

Presenter:

- **Trish Curry**, Training Specialist, Administrative Information Technology Services (AITS)
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