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Introduction

2011-2012 represents the fourth year of operation for the University Business Institute (UBI), established to assist the university and its constituents in responding to the increasing complexity of managing the university’s resources. One thousand one hundred and eighty four (1,184) participants across campus shared in professional development opportunities designed to improve understanding and application of university financial and human resource management policies and procedures as well as personal and professional proficiency in 2011-2012. Four hundred and thirty two unique individuals attended at least one UBI session.

Key Highlights of the University Business Institute 2011-2012:

- Introduced the Productivity Enhancement category with the following supporting sessions:
  - Two new Peer Learning Communities, one for Excel and one for iPad
  - An Event Planning workshop
  - Three Brown Bag Lunch & Learn webcasts
  - Four UBI By the Book discussions
- The Peer Learning Community format was introduced to foster a collaborative discovery approach to learning and improving. Individuals gather monthly to explore resources and tools while connecting with peers to discover better ways of conducting business. Technical skills are enhanced and best practices are uncovered.
- The Communication Skills category expanded to include 3 additional workshops in the Social Media series and 9 additional individual workshops.
- The 3-part Train the Trainer series designed for workshop trainers, facilitators, or presenters as well as those involved in developing workshop or presentation content was well received by 20 individuals. Eleven individuals completed the series.
- The Personal Development and Wellness category expanded to include four additional individual workshops.
- Two staff members join the five staff from last year in completing the ten-module Managing Funds and Accounts Certificate Program. Eleven additional staff are
actively enrolled in the Managing Funds and Accounts certificate program during 2012-13.

- UBI By the Book completed a full year following the launch in April 2011 with 66 individuals requesting membership which avails them of the reading material posted on the UBI By the Book TITANium Community site. One hundred and six (36 unique participants) discussed one or more of the eleven books featured this year related to effective resource management, communication, motivation and personal and professional development.

- The monthly Brown Bag Lunch & Learn webcasts completed its first year with 93 (53 unique) participants in nine American Management Association webcasts and discussions.

**Historical Perspective**

Professional Development session offerings have progressed from 27 (2008-09) to 75 (2009-10), 92 (2010-11), to 159 (2011-12) which represents over a 400% increase in offerings since inception. Similarly, participation in UBI offerings has progressively increased from 268 (2008-09), 439 (2009-10), 951 (2010-11), to 1184 (2011-12) 2011-12 representing a 342% increase since UBI’s inception in 2008-09*. 

Longitudinal Participation Analysis

*Participation in legally-mandated workshops offered in the Health & Safety category by EHS are included in the 2009/10 and 2010/11 statistics but were not available 2011-12 at time of publishing.
Longitudinal Analysis of UBI Session Delivery Formats

One hundred and fifty-nine UBI sessions were offered in 2011-12 to 1,184 participants. The traditional face-to-face individual workshop format (123 sessions) remained the dominating delivery format but this year we introduced two Peer Learning Communities (16 sessions) and the monthly Brown Bag Lunch & Learn webcasts and discussions (9 sessions). The monthly UBI By the Book continued with a core contingent and new members emerging periodically. The following graph includes the Health and Safety workshop offerings (14 sessions).
2011-12 Participation by Category

Participation numbers for those who attended related health and safety training designed to improve understanding and application of campus health and safety management policies and procedures were not available at the time of printing.
Most of the programs are designed for all campus employees except for the Optimizing Staff Performance Certificate program which is designed for MPPs and Department Chairs exclusively. Subsequently, 70% of the participants are non-MPP staff.
2011-12 UBI Sessions by Format and Category

One hundred and fifty nine UBI workshops and other sessions were offered during 2011-12, including ten By the Book sessions. The overwhelming majority (92%) of UBI sessions were offered via workshop format, with almost 60% of total UBI sessions focused on financial resource management or human resource management:

- **Financial Resource Management**
  - Workshops: 15

- **Human Resource Management**
  - Workshops: 17

- **Communication Skills**
  - Workshops: 19 (24 sessions)
  - By the Book: 3
    - How to Win Friends and Influence People (Dale Carnegie)
    - Crucial Conversations: Tools for Talking When Stakes are High (Kerry Patterson, Joseph Grenny, Ron McMillan & Al Switzler)
    - Followership: How Followers are Creating Change and Changing Leaders (Barbara Kellerman)
  - Brown Bag Lunch and Learns: 4

- **Health and Safety**
  - Workshops: 2

- **Productivity Enhancement**
  - Workshops: 11 (25 sessions)
  - Peer Learning Communities: 2 (16 sessions)
  - By the Book: 6
- **First Things First** (Stephen R. Covey)
- **First Break All the Rules: What the Greatest Managers Do Differently** (Marcus Buckingham & Curt Coffman)
- **Execution: The Discipline of Getting Things Done** (Larry Bossidy, Charles Burck & Ram Charan)
- **Six Thinking Hats** (Edward De Bono)
- **The One Minute Manager** (Kenneth Blanchard & Spencer Johnson)
  - Brown Bag Lunch & Learns: 3

- **Personal Development and Wellness** 14 sessions
  - Workshops: 6 (10 sessions)
  - By the Book: 2
    - **Who Moved my Cheese?** (Spencer Johnson & Kenneth Blanchard)
    - **The Art of War** (Sun Tzu)
  - Brown Bag Lunch and Learns: 2
UBI Session Assessments

Overwhelmingly, UBI attendees indicated that the UBI session they attended met their expectations and was relevant. Ninety-seven percent of respondents also indicated that they will apply what they learned.

Nine hundred and ninety six evaluations were collected from 131 UBI sessions in 2011-12. Ninety-seven percent of the respondents indicated that the UBI sessions met their expectations and was relevant to their needs. Similarly, 97% garnered tools, resources, and solutions and plan to apply the knowledge they gained through the University Business Institute. Only 63 respondents indicated neutral and 11 unfavorable on any of the questions.
Sampling of Testimonials from 2011-12 participants

“I highly recommend Managing Funds and Accounts Certificate Program because the workshops gave me the skills to excel in my position. I gained the knowledge in handling department and faculty funds. Thank you for this great opportunity.”

Gloria M. Garcia
Administrative Support Assistant, Liberal Studies
Managing Funds and Accounts Certificate Recipient 2011-12

“When I initially looked at the course offerings for the Managing Funds and Accounts Certificate, I was a little skeptical about the “Intro to..” classes, wondering how much I’d get out of them since I’ve been here for quite a few years. What I found was that there is always something that is either new to me or a good reminder, so I’ve always come away feeling I benefitted from the opportunity. The atmosphere of the workshops makes it easy to ask questions, even if they seem pretty basic. With all the budgetary changes, going back to the basics is really important—so these intro classes really enhance the overall certificate program. And your presenters are very open to discussion and questions—that’s really important!”

Jeanie Weir
Social Work Department Coordinator
College of Health & Human Development

Beneficial aspects cited on the feedback forms for various workshops:

“I learned what forms and codes apply to certain funds.”

(Introduction to Budget and Account Management – Part A)

- “The most beneficial aspects were the explanation of the data warehouse and learning the budget management tools.”
- “How to monitor budgets using OBIEE.”
- “How the budget works and each breakdown of the BBA.”
- “I have a clearer picture of how the reports reflect dept. budget.”
(Introduction to Budget and Account Management – Part B)

- “Learning exactly how to fill out the expense claim form and meeting Debbie.”
- “Debbie walked us step by step through the process of filling out travel. The hands-on experience was great.”

(Introduction to Campus Travel Procedures)

“Discussion about handling difficult people and situations”

(Lunch & Learn—

The Simple Way to Get Through to Difficult People)

- “Provided an inspiring approach on how to engage students so that not only the department and the University are benefitting, but also the student is gaining valuable professional skills.
- “Deanna provided tools, guidelines, and sample procedure manuals to jump start the development of future professionals in our office.”
- “Discussion from diverse viewpoints on how to solve similar problems.”

(Maximizing the Student Employment Experience)

- “Learning more than one way to complete a task”
- “Learning new, faster ways and shortcuts to do things”

(Excel I-2007 Essential Training)

- “I am a new employee and the information was great for me.”
- “Discussion, ability to ask and answer questions.”

(Introduction to Campus Travel)

“Learned new functionality”

(iPad Peer Learning Community)

**Plans to implement skills and knowledge developed in the UBI session:**

- “I will be downloading the OBIEE/SEP reports to show my manager how they can help us budget in our department.”
• “I will be using reports to add columns and formulas recommended for tracking expense percentages throughout the year.”

(Introduction to Budget & Account Management Part B)

“I will be able to better assist the college business manager with processing travel for our college and this workshop will allow me to review paperwork more efficiently and effectively.”

(Introduction to Campus Travel Procedures)

“Nice job having a refresher course as guidelines have changed.”

(Presidential Directive 11)

“I will use the instrumental confidence builder skill set when dealing with a disgruntled student that has found out they have been denied admission to the University.”

(Lunch & Learn—
The Simple Way to Get Through to Difficult People)

• “I am going to talk to my boss to implement new ways to supervise student assistants.
• “I am going to create manuals and procedures for job responsibilities and expectations”
• “I am going to meet with my students weekly.”

(Maximizing the Student Employment Experience)

• “I will follow the procedure so that I have no returned claims”
• “I will re-train peers in the Dean’s office to ensure we are all following the current policy and procedures”

(Refresher for Campus Travel Procedures)

“Many parts of this presentation will be used in my future project implementations.”

(Introduction to Project Management)

• “I plan to share the handouts with my coworkers and staff.”
• “I plan to work with the student assistants to train them how to deal with difficult people.”

  (Dealing with Challenging Coworkers or Student Situations)

• “I will use the knowledge and skills acquired to enhance inter office/campus communications and presentations.”

• “Endless opportunities”

• “Make brochures for my department...create flyers and posters to promote events...design branding for award ceremony... work on graphics for my magazine.”

  (Hands-on Photoshop for Beginners)

“I plan to communicate better, have a more detailed plan, discuss project’s expectations, consider constraints...take ownership.”

  (Introduction to Project Management)