



As of July 22, 2021

TUESDAY, JULY 27

10:00-10:30am **WELLNESS BREAK**
[Yoga in the NACUBO Booth](#)

11:00–11:15am **Welcome**
Susan Whealler Johnston, President and CEO, NACUBO
Megan Strand, Host and Producer *CBO Speaks*

11:15am–12:15pm **Opening Session: The Hidden Brain**
Shankar Vedantam, NPR Social Science Correspondent and Host of *Hidden Brain*
Robert Moore, Senior Vice President for Finance and Administration, Colorado College

NPR science correspondent Shankar Vedantam offers unique insights into how our unconscious biases — what he calls the hidden brain — affect the decisions we make both personally and as groups and organizations. He bases these insights on data, not on psychological theories of the subconscious. Few speakers bring such a trove of breakthroughs in social science research to their audiences' concerns.

The Hidden Brain. Like a puppeteer behind a curtain, the hidden brain shapes our behavior, our choices, and the course of our relationships. But unconscious biases don't just live in our individual brains; they also influence the success or failure of our organizations. In his presentations, as in his book *The Hidden Brain: How Our Unconscious Minds Elect Presidents, Control Markets, Wage Wars, and Save Our Lives*, Vedantam reveals these unconscious patterns and he lays out ways in which we can avoid the mistakes they often cause.

CPE Category: Personal Development

12:15-1:30pm **EXPO HALL**

12:30-1:00pm **WELLNESS BREAK**
[Meditation in the NACUBO Booth](#)

1:30-2:30pm **CONCURRENT SESSIONS**
Community College Business Officers Roundtable
Melissa Beardmore, vice president for learning resources management, Anne Arundel Community College
Liz Clark, vice president, policy and research, NACUBO
Randy Roberson, vice president, leadership development, NACUBO

As higher education moves beyond the pandemic, what do the next few years hold for community colleges? Turn on your camera and connect with community college colleagues to discuss post-pandemic business and financial management issues. Share your thoughts about today's challenges and tomorrow's uncertainties.

CPE Category: Specialized Knowledge

[At the Intersection of Key Business and Legal Issues: An Essential Partnership Between the Campus Business Officer and Campus Counsel](#)

Bronte Burleigh-Jones, vice president for finance and administration, Dickinson College
Janine DuMontelle, vice president and general counsel, Chapman University
Omar Syed, associate vice chancellor and deputy general counsel, University of Texas System

As the business landscape for higher education has been transformed and as institutions face myriad challenges that arose for many pre-COVID-19 and were further exacerbated by the pandemic, business officers must navigate the changes and work toward solutions. Partnering effectively with campus counsel is essential to finding feasible solutions that both meet the needs of the college or university and are legally sound. An expert business officer and two seasoned campus attorneys will discuss key legal issues and the formula for effective collaboration. Co-sponsored by the National Association of College and University Attorneys.

Learning Objectives:

- Identify key legal issues that emerge around the business of higher education and discuss effective ways to collaborate on those issues
- Demonstrate an understanding of legal issues related to personnel matters such as furloughs, RIFs, hiring freezes, retirement incentives, and benefits adjustments
- Discuss how an effective partnership with counsel can work well and possible obstacles to that partnership

CPE Category: Business Law

The \$50b Cost of Excess Capacity in Higher Education and What To Do About It

Daniel Greenstein, chancellor, Pennsylvania System of Higher Education

Tracy Hartzler, president, Central New Mexico Community College

Rosa Redonnet, associate vice chancellor for student success and credential attainment, University of Maine System

Brad Kelsheimer, vice president and chief financial officer, Lumina Foundation

Kasia Lundy, partner, Ernst & Young

As the U.S. began to recover from the Great Recession, enrollments dipped and previously built classroom “seats” at colleges and universities became unfilled or “excess” capacity. The COVID-19 pandemic further exacerbated this issue. The total cost burden associated with excess capacity could be as high as \$50 billion. EY-Parthenon and the Lumina Foundation have collaborated to develop a set of metrics for measuring excess capacity and the implied cost burden placed on institutions. Our panel will discuss the findings of this joint study as well as actions that institutions can take in response to the excess capacity challenge.

Learning Objectives:

- Demonstrate applicability of key higher education pandemic initiated or accelerated trends
- Assess the extent to which current budgeting models have impacted the ability to respond to changing needs
- Identify the benefits of instituting a zero-based budget approach

CPE Category: Finance

Post-Pandemic Higher Education: Accelerating Financial Sustainability With a Zero-Based Mindset

Belva White, vice president of finance and treasury, Emory University

Samantha Fisher, managing director, Accenture

Discover how higher education institutions can apply zero-based methodology to prepare for a post-vaccine world. An overview of trends accelerated by the pandemic will prepare business officers to engage with institutional partners in proactive and responsive financial planning conversations. Panelists will share how zero-based budgeting can be applied and tailored to an institution’s strategic goals. Participants will leave this session with a new mindset for ensuring short-term and long-term financial sustainability for their institutions.

Learning Objectives:

- Demonstrate applicability of key higher education pandemic initiated or accelerated trends
- Assess the extent to which current budgeting models have impacted the ability to respond to changing needs

- Identify the benefits of instituting a zero-based budget approach

CPE Category: Finance

2:30-3:30pm **EXPO HALL**

2:45-3:15pm **DEMO SESSION**

Lease Accounting Standards Compliance: Deloitte's LeaseController Software

Christopher Stewart, Deloitte

Brian Tomich, Deloitte

This presentation will provide an overview of the types of technology solutions that exist to support compliance with Governmental Accounting Standards Board Standard 87 ("GASB 87") – Leases, and insights from the commercial sector where such solutions have been utilized for compliance with ASC 842. Deloitte will present their proprietary software for lease accounting under GASB 87, LeaseController. The presentation will explain its features for data entry for new and modified leases, the standard reports it offers, and its workflow capabilities.

No CPEs for this session

2:45-3:15pm **NETWORKING**

Young Professionals Meet and Greet

Elizabeth LaRocca, senior director, leadership development, NACUBO

Randy Roberson, vice president, leadership development, NACUBO

Take advantage of video technology, turn on your camera, and engage with other young professionals attending the NACUBO 2021 Annual Meeting. Expand your professional network and learn from your peers through a series of small group conversations.

No CPEs for this session

3:30-4:30pm **CONCURRENT SESSIONS**

The Many Faces of Supplier Diversity – A Solution as Unique as Your Institution

Nadia Quarles, assistant vice president, University of Chicago

Danielle Van Vleet, sustainability and diversity program manager, Arizona State University

Robert Wynkoop, associate vice president for administrative operations, Purdue University

Jesse Moore, director, supplier diversity, E&I Cooperative Services

A supplier diversity program is a natural fit for any college or university focused on diversity and inclusion. An effective supplier diversity program expands the procurement universe, increases competition, lowers overall cost, and increases value to your campus. How do you develop an effective program? Supplier diversity initiatives are as unique as your institution, and your specific situation and goals will drive the program you create. This panel discussion provides an inside look at three very different programs, each with a different focus for their supplier diversity journey.

Learning Objectives:

- Identify various ways a supplier diversity program can bring value to your campus
- Demonstrate how a supplier diversity program can extend beyond typical commodity areas to leverage professional services
- Recognize the importance of community outreach in building a successful supplier diversity program

CPE Category: Specialized Knowledge

Embracing Compliance, Security, and Technology in a COVID World

Rachel Grose, assistant bursar, University Wisconsin — Oshkosh

Jean Wolfgang, bursar, University Wisconsin — Oshkosh

Virgil Lloyd, regional vice president, midwest region, Nelnet Campus Commerce

This session will explore the technological innovations reshaping higher education today in the context of the COVID-19 pandemic. Join practitioners and industry experts as they provide insights on processing contactless payments and meeting compliance expectations while

following social distancing guidelines. The presenters will also tackle new technological security challenges and threats facing both students and administrators. In addition, this session will explore actionable strategies to prevent breaches and increase awareness across higher education institutions.

Learning Objectives:

- Gain insights on the technology innovations reshaping higher ed today, including data analytics
- Understand compliance expectations with contactless and cashless payment expectations
- Identify technological security threats facing student accounts and institutions today

CPE Category: Information Technology

Leveraging Budget Models for Cultural Transformation

David Perlmutter, dean, Texas Tech University

Susana Rivera-Mills, provost, Ball State University

Laura Treanor, provost, Vincennes University

Paaige K. Turner, dean and professor, Ball State University

COVID-19 has stressed budgets and business models. To survive, institutions must invest in their future by equipping academic leaders to make strategic budgetary decisions and resource reallocations. Hear how academic unit budgets can be used for strategic alignment and cultural transformation. Strategies covered include incentive-based budgets, internal reallocation, seed funding, indirect cost recovery, and others.

Learning Objectives:

- Demonstrate an understanding of how academic units can leverage strategic budgeting for transformational change
- Recognize first-order and second-order change in order to support transformational change in academic units
- Acquire at least one budget tactic they can implement or share for transformative change

CPE Category: Finance

Supporting Student Success Through Business Office Practices

Heather Heersink, chief financial officer, Adams State University

John Pitcher, vice president, administration and finance, Bunker Hill Community College

Deb Wallace, vice president, administration and finance/CFO, California State University, Dominguez Hills

Leon Wyden, vice president, finance and administrative services and CFO, California State University, San Marcos

Terri Dautcher, NACUBO Consultant

Linda Dauer, NACUBO Consultant

Stephanie Gardner, director, Sova

Jim Hundrieser, vice president for consulting and business development, NACUBO

This session will offer insights about business office practices that can positively impact student outcomes. Thanks to a grant from Ascendium Education Group, NACUBO conducted research with 50+ business officers and their colleagues. The initial results of this research will be shared in this session; a deeper understanding of the challenges faced by students, and strategies for addressing challenges by modifying business office activities to better support student success. Attendees will also be introduced to free web-based interactive training resources, curated by NACUBO, that can be used in staff meetings and in conjunction with new-employee orientation, to support student retention and achievement.

CPE Category: Specialized Knowledge

WEDNESDAY, JULY 28

10:00-10:30am **WELLNESS BREAK**
[Yoga in the NACUBO Booth](#)

11:00-11:15am **Board Chair Remarks and Award Presentation**
Robert Moore, NACUBO Board Chair
Senior Vice President for Finance and Administration
Colorado College

11:15am-12:15pm **General Session: Adaptation Advantage: Leading in a Post-Pandemic World**
Heather McGowan, Future of Work Strategist

When Heather McGowan and Chris Shipley wrote *The Adaptation Advantage* (April 2020, Wiley), they did not realize how prescient their advice and predictions would become when the coronavirus global pandemic required an immediate and dramatic shift in work, learning, and leading. Overnight companies remapped supply chains, pivoted product lines, and transformed to distributed work-from-home organizations. Entire university and school systems adopted virtual delivery exclusively, something many said they would never do. This new normal, or normal of now, requires a focus on culture, purpose, trust, and psychological safety as we embark on the largest social experiment in human history. The virus has accelerated our future of work, expedited our human transformation to digital creating, and placed an even greater burden on leaders to inspire and motivate human potential. Even when the virus subsides, many of our new ways of working will remain and we will be the better for this forced transformation.

CPE Category: Personal Development

12:15-1:30pm **EXPO HALL**

12:30-1:00pm **WELLNESS BREAK**
[Meditation in the NACUBO Booth](#)

12:30-1:15pm **CONNECT AND COLLABORATE**
[LGBTQIA+ Roundtable](#)

Gregg Goldman, vice chancellor and chief financial officer, University of California, Los Angeles
Bob Miller, director, budgets, division of strategic enrollment, The University of Texas at San Antonio

Gini Carla Pierre, business administrative associate, University of Illinois at Chicago
Jim Hundrieser, vice president of consulting and business development, NACUBO

Our Connect and Collaborate Roundtable is an opportunity for the NACUBO community to discuss how NACUBO can better advance equity and support for the LGBTQ+ community. This session will also be an opportunity for networking and discussion on ways NACUBO can provide programming or other support for the LGBTQ+ community.

No CPEs for this session

12:30-1:15pm **DEMO SESSION**
[Anaplan Connected Planning and Budgeting, Featuring New York University](#)
Stanley Ng, New York University
Wayland Ng, truED Consulting

Join this live demo session to learn how colleges and universities are leveraging the Anaplan cloud platform to transform budgeting, planning, and analytics. This demo session will feature a customer case study, with NYU joining to share how the university uses Anaplan to optimize resource allocation and improve strategic decision-making through scenario modeling and analytics.

No CPEs for this session

1:30-2:30pm **CONCURRENT SESSIONS**

Educational Equality and Access: Higher Education Trends Before, During, and After COVID

Shannon Gundy, executive director of undergraduate admissions, University of Maryland, College Park

Pablo G. Ortiz, vice president for regional and world locations, Florida International University

Matt Unterman, practice lead and principal, higher education advisory services practice, Grant Thornton LLP

Dale Whittaker, senior program officer lead, Bill & Melinda Gates Foundation

This session will explore key trends in higher education regarding access for first generation, minority, and adult learner populations. Are we as an industry making progress or falling behind? And to what degree did COVID-19 impact these trendlines? We will examine strategies, initiatives, and transformation efforts institutions are using to improve educational equity and outcomes for high-priority populations. University business officers will discuss their experiences building out programs to target and support equitable outcomes and student success, focusing on the investments that were required, as well as the positive impacts these investments had on mission and financial performance.

Learning Objectives:

- Understand trends in higher education access, equity, and outcomes and how COVID-19 has impacted those trendlines
- Identify opportunities for improving access and equity for high-priority populations
- Determine how to invest in programs and initiatives in order to serve these populations

CPE Category: Specialized Knowledge

Accelerating Analytics Use Through Data Governance

Jon Bruner, chief information officer, Abilene Christian University

Augie R. Freda, Jr., campus data steward, University of Notre Dame

Rashmi Radhakrishnan, vice president and chief information officer, Arcadia University

Lindsay Wayt, director, analytics, NACUBO

Cathy Bates, vice president, Vantage Technology Consulting

Findings from the *2019 NACUBO Study of Analytics* confirmed that business officers believe more importance should be placed on the use of data and analytics to support decision-making...but also confirmed the existence of many barriers that hinder progress on becoming data-informed institutions. Having effective policies and practices in place can help leaders work together to overcome such barriers. Hear from three institutions that are in different phases of their data governance journeys. Panelists will share how investing into effective data governance has helped their institutions to better leverage data in their decision-making processes.

Learning Objectives:

- Understand what role business officers have in supporting data governance
- Compare data governance best practices based on how far along an institution is in its journey to leverage data and analytics
- Identify appropriate next steps for your institution's data governance initiative

CPE Category: Finance

What Keeps Business Officers Up at Night

Sharron Burnett, vice president for finance and administrative services, Dyersburg State Community College

Ed Kania, vice president for business and finance and treasurer, Rollins College

Lynne Schaefer, vice president for finance and administration, University of Maryland, Baltimore County

Doug Lederman, editor, Inside Higher Ed

Are business officers more or less confident in their institutions' financial stability than they were before the pandemic? Have federal recovery dollars helped colleges and universities blunt the financial impact of the pandemic and recession? How likely are institutions to consider mergers or other significant forms of consolidation or cross-institutional collaboration? Join *Inside Higher Ed's* editor and several of your CBO colleagues to discuss the answers to these and other questions included in *Inside Higher Ed's* 2021 Survey of College and University Business Officers.

CPE Category: Specialized Knowledge

CEO's Share Insight on Dramatically Tightening Insurance Market

Courtney Davis Curtis, assistant vice president for risk management and resilience planning, University of Chicago

Janice M. Abraham, president and chief executive officer, United Educators Insurance

John Q. Doyle, president and chief executive officer, Marsh LLC.

John McLaughlin, senior managing director – higher education practice, Gallagher

At a time that could not be worse for higher education, policyholders are experiencing significant premium increases, stringent underwriting and restrictive coverage offerings, as well as reductions in policy limits. A panel of insurance professionals and campus experts will discuss challenges and opportunities that the current and future market hold for higher education. Presenters will address risk tolerance and financial thresholds and equip business officers with strategies to mitigate current insurance market conditions.

Learning Objectives:

- Describe the causes and complications of the sudden change in insurance market conditions
- Develop strategies for managing and communicating in these changed circumstances
- Analyze available insurance solutions and alternative risk-financing techniques

CPE Category: Specialized Knowledge

2:30-3:30pm **EXPO HALL**

2:45-3:15pm **NETWORKING**

NACUBO Consulting Session

No CPEs for this session

3:30-4:30pm **CONCURRENT SESSIONS**

Lights, Camera, Action: How to Effectively Communicate in a Digital World

Susan Maddux, vice president for finance and administration, Furman University

Jennifer Morgan, executive director, JPMorgan

Jean Walshe, managing director, JPMorgan

Interactions have been anything but normal as the workplace shifted to new communication environments during the pandemic. By sharing how JPMorgan trained its employees to effectively host virtual meetings, this engaging and insightful session will offer innovative tips and presentation delivery ideas, as well as ways to foster engagement and collaboration. These tools will help you enhance and adapt your presentation skillset. Learn best practices to “up your Zoom game” and incorporate these skills into digital meetings with colleagues, donors, and business partners.

Learning Objectives:

- Enhance your appearance and non-verbal communication in digital meetings and presentations
- Learn to lead a digital session in a way that drives engagement and collaboration among the participants
- Identify how to avoid common mistakes and improve your overall digital presence.

CPE Category: Communications and Marketing

Liquidity Strategies for Higher Education Post-COVID

Mark Amiri, treasurer, Washington University in St. Louis

Adam Day, associate treasurer, Rutgers University

John Dolan, treasurer, Carnegie Mellon University

Holly R. Harrison, senior vice president, liquidity management, PNC Bank NA

Over the course of the COVID-19 pandemic, universities saw a wide range of impact to their operating models and revenue profiles. Several common themes and best practices emerged as a result. The panelists will take a deep dive into various lessons learned to help the audience find ways to maximize cash utility at their institutions. These topics range from cash forecasting and liquidity management guidelines to liquidity structure and bank credit. Three university case studies will be used to provide additional context and practical approaches to liquidity strategies as institutions begin planning for a post-pandemic environment.

Learning Objectives:

- Identify ways to improve cash flow forecasting and define liquidity needs during uncertain times
- Evaluate the best uses of liquidity across their organization
- Weigh the benefits of various sources of liquidity to optimize capital structure

CPE Category: Finance

Future of Work and Talent Strategies in Higher Education

David DeJong, vice chancellor of human resources, University of Pittsburgh

Michelle Lewis, vice president, research administration and operations, Children's Hospital of Philadelphia

Susan Basso, principal, Huron

Phil Strzalka, managing director, Huron

This interactive session will focus on the ways your business office can evolve its operating model, improve efficiencies, manage engagement and implement new talent strategies. Presenters will discuss how work and talent strategies are changing in higher education as a strategic imperative to help institutions deliver on their missions. You will learn to carefully examine the role technology will play in transforming roles and responsibilities, automating administrative processes, changing the education model, generating data and insights, and priming the institution for long-term success. Panelists will also address trends in permanent remote work, multistate recruitment, performance management, and employee wellbeing.

Learning Objectives:

- Explore different types of operational models for a business office and identify which is best for their institution
- Understand the need for role development and upskilling
- Discover how to evaluate work that can be done remotely and if their organizations have the right policies, practices and culture

CPE Category: Personnel/HR

Primary Representatives Meeting

Invitation-only

No CPEs for this session

4:45-5:45pm **NETWORKING**

THURSDAY, JULY 29

10:00-10:30am **WELLNESS BREAK**
Yoga in the NACUBO Booth

11:00am-12:00pm **CONCURRENT SESSIONS**
AI-Powered Strategies: Competitive Advantages for Recruitment, Enrollment, and Student Success for Traditional and Non-Traditional Students
Barrie Fitzgerald, director of institutional research, Valdosta State University
Peter Fritz, senior manager, Deloitte
Brian Haugabrook, specialist leader, Deloitte

As pre-pandemic pressures on enrollment intensify, institutions of all sizes will increasingly benefit from innovative techniques to recruit high-fit prospects from different prospect populations. This session will explore techniques for leveraging artificial intelligence, machine learning, external data, and cloud solutions to achieve institutional enrollment management and tuition revenue goals. Additionally, speakers will review strategies to improve diversity and address bias in AI models. This session will offer a demonstration two specific solutions: Analytics Cloud and Candidate 360TM.

Learning Objectives:

- Understand how to use artificial intelligence and machine learning approaches to reach enrollment and class composition goals
- Describe the benefits of enriching student and financial data from external sources to improve student financial aid leveraging and tuition discounting strategies
- Learn how artificial intelligence strategies can identify new high-fit prospects for adult learner initiatives, veterans, and undergraduate and graduate student populations

CPE Category: Information Technology

Improving the Economics of Academic Programs: Benchmarking and Predictive Analytics
Brien Smith, provost and vice president of academic affairs, Youngstown State University
Robert G. Atkins, CEO, Gray Associates, Inc.

In tough times, colleges and universities may consider cutting programs. Without using a data-informed approach, these cuts may do more harm than good. In this session, participants will learn about a more effective approach to reducing instructional costs. Presenters will explain how to calculate instructional costs at the program and course levels and will demonstrate methods for finding and cutting excess costs. Using an institution case study and simulations, presenters will show the effects of starting, stopping, sustaining, and growing different programs. They will explore both financial impacts and the effects on student demographics, particularly for historically underserved student groups.

Learning Objectives:

- Identify over-simplified approaches to academic cost reduction and communicate associated risks
- Describe and implement an effective approach that reduces academic costs without cutting programs
- Understand how to use a data-informed approach, including finding and modeling the right data in academic program decision-making

CPE Category: Finance

Projecting Credibility for Strategic Decisions and Rating Agencies
Mary Ellen Borchers, assistant vice president for finance, Illinois Institute of Technology
Sharon Heinle, associate vice president and controller, George Mason University
Michael Horan, vice president for finance, CFO, and treasurer, Illinois Institute of Technology
Monica Michaud, director, finance and debt management, George Mason University

Michael M. Nicolescu, implementations manager, Synario

When facing major strategic changes, institutions cannot simply extrapolate from historical data to create projections. New initiatives, capital projects, and partnership plans have to succeed under a range of possible alternative futures. George Mason University and Illinois Institute of Technology provide examples of how strategic financial modeling and scenario planning can help make major decisions while protecting against future uncertainties. The panelists will discuss specific examples of sensitivity analysis applied to major vulnerabilities and demonstrate how outcomes of scenarios can be effectively communicated with rating agencies—even when the results change during a pandemic.

Learning Objectives:

- Review why considering all-funds pro forma financial statements is important to avoid blind spots
- Communicate the impact of strategic financial planning to senior leadership, rating agencies, and other key stakeholders
- Describe key strategies and tactics used to create a sustainable financial model so that stakeholders have trust and confidence in the results

CPE Category: Finance

A New Higher Education Strategic Framework for a Post-COVID-19 World

Michael Gower, executive vice president, chief financial officer, and university treasurer at Rutgers University, Rutgers, The State University of New Jersey

Susan Maddux, vice president for finance and administration, Furman University

Doug Chittenden, executive vice president and head of client relationships, TIAA

Christina Cutlip, senior managing director, client engagement and national advocacy, TIAA

COVID-19 has created severe financial and operational challenges for colleges and universities. In these uncertain times, discerning “what is next” will require calculated speculation and some risk-taking. Looking beyond the pandemic, institutional leaders need to evaluate how their institutions’ operating models will change to help ensure financial sustainability. To understand how institutions can adapt to the effects of the pandemic and beyond, TIAA partnered with EY-Parthenon to analyze quantitative and qualitative data from multiple sources. This open forum will feature a review of the data findings and a discussion about the potential paths forward.

Learning Objectives:

- Demonstrate an understanding of the key findings from TIAA and EY Parthenon research on higher education in a post-COVID-19 world
- Identify key questions to ask as part of the post-pandemic strategic planning process
- Learn what leaders may need to consider when they are evaluating changes to their financial operations and business models

CPE Category: Finance

12:00-1:30pm **EXPO HALL**

12:30-1:00pm **WELLNESS BREAK**
Meditation in the NACUBO Booth

12:30-1:15pm **CONNECT AND COLLABORATE**
Business Officers of Color Roundtable
Ronald Cortez CFO and vice chancellor of finance and administration, University of California, Irvine
Maeesha Merchant, chief financial officer, The Colburn School
Randy Roberson, vice president, leadership development, NACUBO
Tadu Yimam, vice president, digital engagement, NACUBO

Take advantage of video technology and connect with fellow business officers of color. In this roundtable session, you will have the opportunity to expand your network, reaffirm and explore

your role as a leader, and get guidance and support from other business officers of color. You also have the opportunity to suggest strategies for NACUBO to help business officers of color achieve increased levels of responsibility.

No CPEs for this session

1:30-2:30pm **CONCURRENT SESSIONS**

GLBA Compliance Is Easier Than You Think!

Shameie Haynes, audit manager, Mississippi State University

Johnny Sanders, managing consultant, BKD CPAs & Advisors

Colleges and universities are subject to privacy and information security provisions of the Gramm Leach Bliley Act (GLBA). Institutions must be cognizant of GLBA rules when collecting, storing, accessing, and using student financial records—compliance will be evaluated under the Office of Management and Budget’s single audit requirements. Panelists provide an overview of GLBA and common challenges facing institutions. Remedies for enhancing processes, policies, controls, training, and risk assessments to mitigate audit findings and Title IV funding risk will be provided.

Learning Objectives:

- Explain why the Federal Trade Commission considers higher education institutions subject to GLBA
- Enumerate simple enhancements that will increase your institutions security and prevent putting Title IV funding at risk
- Apply techniques that enhance risk assessments, training, controls, and policies

CPE Category: Accounting

Re Thinking Public University Systems: Implications for a Lower Cost Business Model

Ellen Herbst, Vice President and CFO, University System of Maryland

Jim Johnsen, Senior Fellow, NASH, and Former President, University of Alaska System

Jason Lane, Senior Fellow, NASH, and Dean, College of Education, Health & Society, Miami University

David Miller, Senior Vice President and CFO, University System of Tennessee

The National Association of System Heads (NASH) is leading a Big ReThink of the role of public university systems in our post-pandemic world. These systems, which include the institutions that educate the majority of the nation’s students in four-year public colleges and universities, are uniquely positioned to leverage their “systemness” to create value greater than the sum of their parts. Hear how system leaders from across the nation are considering several strategic imperatives, including consideration of a new, lower cost business model for university systems.

Learning Objectives:

- Gain an understanding of NASH’s Big ReThink process
- Explore results of recent surveys on cost reduction
- Consider a new business model for systems to reduce costs and optimize resources for strategic priorities

CPE Category: Specialized Knowledge

Are Your Policies Advancing Your DEI Agenda?

Autumn Anfang, vice president for business and finance and CFO, St. Norbert College

Allison M. Vaillancourt, vice president, organizational effectiveness, Segal

Growing demands for diversity, equity, and inclusion have prompted institutions to evaluate their practices and organizational culture. Many colleges and universities are conducting climate assessments and examining hiring, promotion, and pay practices. However, few institutions are taking a critical look at organizational policies that may be hampering their efforts to diversify and support the success of their current and potential faculty, staff, and students. This session will outline an effective process for analyzing policies through a diversity, equity, and inclusion (DEI) lens to ensure that policies advance, rather than inhibit, DEI goals.

CPE Category: Personnel/HR

Insights from the NACUBO 2021 CBO Profile

Dawn Rhodes, chief business and finance officer and senior vice president for administration and finance, University of Maryland, Baltimore

Sara Thorndike, senior vice president for finance and business and treasurer, Pennsylvania State University

Ken Redd, senior director, research and policy analysis, NACUBO

Randy Roberson, vice president, leadership development, NACUBO

Jill Popovich, senior managing director, TIAA

Examine the results of NACUBO's 2021 National Profile of Higher Education Chief Business Officers and the increasingly complex role of the chief business officer (CBO). Who is sitting in the CBO chair today? What skills do future CBOs need to be successful? How do we increase diversity in the CBO pipeline? Experienced CBOs will explore the results of the NACUBO study, share how aspiring CBOs can better prepare to take on new and broader roles at their institutions, and offer their ideas for expanding diversity in the CBO pipeline.

Learning Objectives:

- Examine demographic data related to CBOs
- Explore the complexities of the CBO role
- Discuss strategies to further diversify the next generation of CBOs

CPE Category: Specialized Knowledge

2:30-3:30pm **EXPO HALL**

2:45-3:15pm **DEMO SESSION**

How to Regain Control of the Bottom Line and Financial Planning Process

Carlos Avalos, Jenzabar

Meghan Turjanica, Jenzabar

Higher education institutions have been facing significant financial challenges for some time with no clear end in sight. Institutional revenues are down due to declining enrollments, declining high school graduation rates, varying discount rates, and growing concerns or questions about the overall perceived value of higher education. Meanwhile, government funding (on federal and state levels) is down, loan and bond interest rates are rising, and the cost of education is increasing. These variables mean that more departments and vendors are getting involved in the financial planning process.

Now more than ever, higher education leaders must find ways to use data efficiently to improve transparency and uncover actionable intelligence. While higher education institutions have access to huge amounts of data that could support financial planning and decision-making, much of this information lives in siloed, disparate systems. In truth, many institutions have tremendous volumes of data that they rarely analyze or know how to use. In order to understand projections, achieve objectives, and improve operational efficiency, finance leaders across campus must better control and manage their institution's critical financial information, including data associated with student and vendor activity, budgets, accounts, cash flow, capital assets and more.

Join this product demo for more insight into how Jenzabar One, a modern ERP, can enable and empower institution leaders to streamline and optimize financial operations so staff can focus on delivering a remarkable student experience. The demo will also review how Jenzabar Analytics (part of Jenzabar One) enables decision-makers across campus to use data to gain insights, discover trends, make informed decisions, and take impactful actions that improve the bottom line and student outcomes.

No CPEs for this session

2:45-3:15pm **NETWORKING**
HBCU Business Officers Meet and Greet
No CPEs for this session

3:30-4:30pm **CONCURRENT SESSIONS**
CFO Roundtable: A Year of Disruption and Change Agent for the Future
Alanna Cajthaml, chief financial officer and vice president for finance and business strategy, Azusa Pacific University
Suzanne Davis, president, Greenville University
Kimberly Hadley, vice president for finance and administration, John Brown University
Daniel M. Campbell, partner, higher education services director, CapinCrouse LLP

This roundtable session will feature insight from three private institutions. The discussion will primarily focus on changes required to deal with the COVID-19 pandemic and how the speakers' institutions have managed to thrive in the face of unprecedented challenges. Other discussion topics will include what our speakers anticipate for the future of higher education in the private institution space, what opportunities have presented themselves over the last year, unique partnerships that have been forged in light of the pandemic, how their institutions have handled a remote or partially remote workforce, effective new cost-cutting measures they've implemented, and potential future enrollment trends, among other topics.

Learning Objectives:

- Describe a variety of approaches other higher education institutions employed for handling COVID-19 disruptions
- Identify which real-life implementation strategies have positively impacted higher education institutions during a time of unprecedented challenges
- Demonstrate first-hand insight on potential opportunities borne from the pandemic for the higher education sector moving forward

CPE Category: Specialized Knowledge

In-House Virtual Internship Programs for Students Facing COVID-19 Challenges
Arthur Bradford, executive vice president and chief financial officer, University of North Texas at Dallas
Brody Du, lead data scientist/department head/machine learning, office of strategic analysis and reporting, University of North Texas at Dallas
Shinae Yoon, IR analyst, office of strategic analysis and reporting, University of North Texas at Dallas

Due to the COVID-19 pandemic, underrepresented students have faced severe financial hardships and have been less likely to get paid internships. As a response to these trends, University of North Texas at Dallas launched a virtual internship program that helps its students gain work experience. This program includes leadership training, one-on-one mentoring, and building data analysis skills. In this presentation, speakers will demonstrate how UNT Dallas launched this virtual program and how the institution uses the students' analytical skills to improve its performance.

Learning Objectives:

- Learn how to create a virtual internship program for underrepresented or other students
- Identify key business insights that can be generated by student interns and how to use these insights in campus decision-making
- Understand how an in-house virtual internship program combined with the knowledge and practice of business intelligence and advanced predictive analysis can help student success

CPE Category: Specialized Knowledge

Integrity in Institutional Advancement: The Urgent Partnership Between Chief Financial Officers and Chief Advancement Officers
Brian Hastings, president and CEO, University of Nebraska Foundation

Matthew Eynon, vice president for college advancement, Franklin & Marshall College
Mitchell Wein, senior vice president for administration and finance, Haverford College
Sue Cunningham, president and CEO, Council for Advancement and Support of Education

The Council for Advancement and Support of Education (CASE) recently released global standards for institutional fundraising, with new definitions for educational philanthropy, important guidance around record-keeping, and more. These standards create an opportunity for clarity and consistency when reporting complicated gifts, considering issues of donor influence, and promoting transparency. Further, they create a clear imperative for ethical standards. The key leadership partners in this are the chief advancement and chief financial officers and session panelists will discuss the importance of the CAO-CFO relationship as institutions navigate these new standards.

Learning Objectives:

- Learn how new standards help support risk and reputational management related to educational philanthropy
- Explore how the CASE Standards help ensure alignment between the chief financial officer and the institution's development program
- Discuss how to enhance collaboration between the advancement and business offices
- Understand the standards for reporting educational philanthropy and the guidance underpinning these standards for counting and categorizing gifts

CPE Category: Finance

Public Institution Roundtable

Sharon Heinle, associate vice president and controller, George Mason University
Bob Kuehler, associate vice president and controller, University of Colorado
Sue Menditto, senior director, accounting policy, NACUBO
Mary Wheeler, FARM author, NACUBO

This interactive session will cover many topics of interest to public institutions. Not only have there been pandemic related challenges and opportunities – from operating changes through compliance and reporting requirements driven by federal and state relief programs – but the GASB has also been active. Join colleagues as we run through a list of topics such as remote working, public health expectations, meeting student and faculty needs, challenging HEERF questions, SEFA, single audit and GAAP revenue recognition, GASB's revenue and expense and compensated absences projects and fiduciary activities.

Learning Objectives:

- Explain various operational approaches to pandemic related disruptions
- Demonstrate accounting and reporting knowledge for various forms of COVID related aid
- Identify possible GASB related issues and understand recommended practice

CPE Category: Auditing (Governmental)

4:45-5:45pm **NETWORKING**

FRIDAY, JULY 30

10:00-10:30am **WELLNESS BREAK**

Yoga in the NACUBO Booth

11:00-11:15am **Incoming Board Chair Remarks**

Susan Scroggins, Incoming NACUBO Board Chair
Senior Vice President for Finance and Treasurer
Valparaiso University

11:15am-12:15pm **Closing General Session: Leading Through Uncertainty**

Nadja West, 44th Army Surgeon General and Former Commanding General, US Army Medical Command

According to Lieutenant General (ret) Nadja West, the most essential quality in a great leader is empathy – where “leading is all about the team of people you lead.” This is especially true in times of crisis and uncertainty. In this presentation, West draws on her more than 20 years of experience in executive leadership, crisis management, and disaster response – including leading more than 130,000 Army healthcare professionals and crafting the U.S. Department of Defense medical response to the Ebola crisis – to provide effective leadership tactics during difficult times. Throughout these challenges, she thought strategically, developed confidence, and stayed connected to her sense of purpose. Sharing her career lessons-learned, West demonstrates that good leadership and a loyal team come from strong communication, truly understanding your people, treating them with respect, and leading with empathy, particularly through hard times.

CPE Category: Personal Development

12:15-1:30pm **EXPO HALL**

12:30-1:00pm **WELLNESS BREAK**

Meditation in the NACUBO Booth

12:30-1:15pm **CONNECT AND COLLABORATE**

Women Business Officers Roundtable: Leadership Lessons Men Can Learn from Women and Career Lessons Women Can Learn from Men

Gaye Manning, vice chancellor for finance and administration, Southern Arkansas University Tech

Dawn Rhodes, chief business and finance officer and senior vice president for administration and finance, University of Maryland, Baltimore

As women leaders, we must continue efforts to advance gender equality and gender parity. This will be a fun, interactive session that will allow the audience to explore some of the leadership qualities that make women great leaders, but also provoke thought about career advancement lessons.

No CPEs for this session

12:30-1:15pm **DEMO SESSION**

Leveraging Business Partnerships to Accelerate Your Campus Diversity, Equity, and Inclusion Goals

Natily Santos-Ortiz, vice president, Specialty Supply Chain for Aramark

Aramark’s holistic approach to global diversity and inclusion is a business and a people strategy to: hire, retain, and develop a workforce that reflects the marketplace; maintain a culture that values and leverages differences and similarities; and create marketplace value by partnering with diverse suppliers, engaging with the community, and delivering culturally relevant products and services. This session will share examples of how this three-pronged approach takes shape, as we work with our higher education partners to promote a thriving campus community.

No CPEs for this session

1:30-2:30pm **CONCURRENT SESSIONS**

Fiscal Resiliency: Evaluating Intercollegiate Athletic Programs

Dr. Michael McFarland, director of athletics/associate professor/chair, department of athletics faculty, Bloomsburg University

Susan Maloney, firm director, Baker Tilly

Athletics can be an enrollment driver and attract under-represented populations. Before reducing or eliminating athletic programs to bridge the gulf in their financials, institutions

should understand the contributions that athletics make to diversity, academic, and financial performance. Completing a deep analysis of the contributions of each athletic team can provide the necessary data for boards and leaders to make informed decisions. This session will provide specific actions that leaders can take to make decisions needed to move forward with their athletic programs.

Learning Objectives:

- Analyze the relevant data that is needed to understand the comprehensive impact of athletics on an institution
- Evaluate athletic return on investment across recruitment, enrollment, retention, diversity, and student outcomes
- Demonstrate how financial templates can be used to assess the contribution margins of intercollegiate athletic teams and programs

CPE Category: Finance

Creating Space for Diversity and Inclusion in Your Campus Real Estate

John Fry, president, Drexel University

Cynthia Teniente-Matson, president, Texas A&M University

David Thomas, president, Morehouse College

Herman Bulls, vice chairman, Americas, JLL

By 2045, the majority of the U.S. population will be comprised of Hispanics, Blacks, Asians, and multiracial people. Among college and university students, the demographic shift will occur even sooner, according to the Brookings Institution. How can business officers institutionalize diversity and inclusion in their real estate and facilities operations to reflect the changing world? In this session, three college and university presidents will discuss how institutions can incorporate diversity and inclusion into campus facilities practices. The discussion will highlight the importance of committing to diversity and inclusion beyond surface gestures, and instead to a sustained focus on tangible action.

Learning Objectives:

- Discuss why diversity, equity, and inclusion is critical to the future of real estate and facilities projects for any college or university
- Lead difficult conversations about equity and inclusion with internal and external stakeholders
- Analyze the perspectives of stakeholder communities and what they expect from campus real estate and facilities teams

CPE Category: Specialized Knowledge

College After COVID: Enrollment, Finances, and a Path Forward

Christopher Marsicano, assistant professor, practice of higher education, Davidson College

John Barnshaw, vice president – research and data science, Ad Astra

Using data from more than 3,000 colleges and universities and surveys from two nationally representative studies, this session will explore the impact of COVID-19 on higher education institutions. In addition to examining which institution types were most negatively affected by enrollment and financial strains as higher education transitioned to online instruction in 2020, speakers will also celebrate innovations deployed during the COVID-19 pandemic, such as the creation of new and resilient pathways to graduation.

Learning Objectives:

- Learn what institutional characteristics predicted enrollment and financial strain due to the COVID-19 pandemic
- Gain an enhanced understanding of the link between course scheduling plans, enrollment, and financial health during the pandemic and beyond
- Better understand the innovations in testing and monitoring developed at HBCU institutions and the unique challenges faced by Hispanic-Serving Institutions with disabled students

CPE Category: Specialized Knowledge

2:45-3:45pm **CONCURRENT SESSIONS**

Ask the NACUBO Policy Experts

Mary Bachinger, director, tax policy, NACUBO

Bryan Dickson, director, student financial services and educational programs, NACUBO

Neil Gavigan, policy and advocacy manager, NACUBO

Sue Menditto, senior director, accounting policy, NACUBO

Megan Schneider, senior director, government affairs, NACUBO

NACUBO's advocacy team members are your liaisons with legislators and policymakers at the national level and with national accounting standard setters. From tackling challenges related to IRS Form 1098-T to advocating for pandemic relief guidance, this team ensures business officers are in the know about important accounting principles and federal regulations and laws. Bring your questions and concerns to this session where our team of experts will discuss the latest information from the Department of Education, FASB, GASB, or IRS and help you understand where White House and congressional proposals are headed in the coming months.

Learning Objectives:

- Recognize the priority issues the NACUBO policy team is focused on
- Discuss the resources available to NACUBO members that support compliance and advocacy efforts
- Identify current issues and analyze the likelihood for enactment of policies that could alter higher education business practices

CPE Category: Specialized Knowledge

Ask the NACUBO Research and Analytics Experts

Kathleen Masterson, NACUBO

Ken Redd, MA, NACUBO

Lindsay Wayt, Ph.D., NACUBO

As colleges and universities are embracing analytics and using data, NACUBO is providing members with services that offer awareness, knowledge, and guidance that can support data-informed decision-making practices. Learn more about our efforts to accelerate analytics use and share your suggestions and explore new ideas with the team that brings research-based solutions to business officers. From understanding study design to exploring the findings, learn more about the NACUBO-TIAA Study of Endowments, the NACUBO Tuition Discounting Study, the Student Financial Services Benchmarking Study, the 2021 Profile of Higher Education Chief Business Officers, and more.

Learning Objectives:

- Develop an understanding of NACUBO's research portfolio
- Recognize how NACUBO is helping colleges and universities leverage analytics to inform decisions
- Discuss the research resources available to NACUBO members
- Identify how institutional participation in research surveys advances knowledge and understanding for the entire higher education sector

CPE Category: Specialized Knowledge