



# NACUBO 2020 VIRTUAL ANNUAL MEETING — JULY 13-17 —

As of July 10, 2020

## MONDAY, JULY 13

11:00–11:15am **Welcome**

*Susan Whealler Johnston, President and CEO, NACUBO*

11:00am–12:15pm **Opening Session: The Problem-Solving Generation**

*Jaime Casap, Education Evangelist*

As the world gets more digitalized, it also gets more complex. We now operate on a global scale and our job in higher education is to help students develop the knowledge, skills, and abilities they will need to thrive in this new digitalization environment. Higher education and prepare them to solve problems we haven't defined yet, using technology that hasn't been invented, in roles that continue to shift, or do not even exist today. To thrive in this new era, colleges and universities need to help learners master critical skills like problem solving, collaboration, critical thinking, and the ability to continuously learn. In this talk, we will discuss the critical role of higher education and the value proposition they bring to the problem-solving generation.

**CPE Category: Specialized Knowledge**

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

**From Dashboards to Decisions: Empowering Leaders with Analytics**

*Michal-Anne Miller, Arizona State University*

*Carrie Robinson, Arizona State University*

*David Sullivan, Arizona State University*

All colleges and universities have data. But how can they turn that asset into insights for decision making, particularly when resources are limited? Using one college as an example, the presenters will show how making a small investment in analytics and data visualizations can add value and efficiency. Dashboards make data accessible, allow for easy user consumption, create transparency and trust, and empower decision making at all levels of leadership.

**CPE Category: Finance**

**Impact Events and Managing the Message in the Social Media Age**

*Melody Bianchetto, University of Virginia*

*Andy Fuller, University of Notre Dame*

*Matthew Ward, California Lutheran University*

*James Lock, J.P. Morgan Trust Company, NA*

There is no shortage of ways colleges and universities can end up on the front page of the newspaper. In the age of social media, the communications impact of unexpected incidents is not only lightning-quick, but also ranges far beyond the confines of the campus. The administration's response to these incidents is crucial in maintaining trust and accountability in the eyes of an institution's stakeholders. The panelists will examine how various colleges have responded to extraordinary incidents and proactively managed the message, while creating a space for dialogue among students, faculty, and community members.

**CPE Category: Communications and Marketing**

### **What Makes a Good Cash-On-Hand Policy?**

*Charmel Maynard, University of Miami*

*Mary Peloquin-Dodd, North Carolina State University*

*Christopher Cowen, BofA Securities, Inc*

*William Jarvis, Bank of America*

Since the financial crisis in 2008, liquidity has become a tantamount concern to college and university ratings agencies and other stakeholders, who want better information about how institutions manage their cash on hand. In this session, learn about the new techniques business offices can use to track information about an institution's liquidity and overall financial picture, plus discover how to effectively communicate liquidity and other financial information to boards of directors and other constituencies.

**CPE Category: Finance**

### 3:00-4:00pm **ROUNDTABLES**

#### **Roundtable: Reopening the Student Accounts Office in a Time of Social Distancing**

*Alisa Abadinsky, University of Maryland*

*Loretta Chrzan-Williams, Monroe Community College*

*Bryan Dickson, NACUBO*

While many student account transactions take place online, there is still a need for face-to-face interaction at bursar offices at colleges and universities. COVID-19, including its social distancing restriction, will clearly need to be addressed. What changes will need to take place at your bursar's office in order to protect your students and staff? How quickly will you bring back your staff? In addition to physical changes—such as office layouts, protective barriers, face coverings, and queuing and cleaning procedures—institutions will need to consider changes to student account policies, as well. Registration hold thresholds, late fees, in-person payments, and collections practices are all on the table. Share ideas with colleagues and learn how best to communicate these changes to your students and staff.

**CPE Category: Specialized Knowledge**

#### **Community College Business Officers Roundtable: Planning for Fall 2020 and Beyond**

*Jeffrey West, Salt Lake Community College*

*Janet Wormack, Houston Community College System*

Academic year 2019-2020 was unlike any we have seen. What will the next year hold? Connect with community college colleagues to discuss business and financial management issues. Share your thoughts about today's challenges and tomorrow's uncertainties.

**CPE Category: Specialized Knowledge**

#### **HBCU Business Officers Roundtable: Planning for Fall 2020 and Beyond**

*Horace Chase, Tennessee State University*

*Willie Hughey, Fisk University*

*Kevin Carrington, Segal*

The events our nation is grappling with—the coronavirus pandemic, a recession, and national unrest about racism—will have a lasting impact on higher education. Though all colleges and universities will be impacted, HBCUs, which have a mission to serve student populations most affected by these national crises, will be acutely impacted. At this roundtable, connect with HBCU colleagues to discuss how they are navigating financial challenges, planning in a time of social distancing, and meeting the needs of their students.

**CPE Category: Specialized Knowledge**

### **Roundtable: Endowment Stewardship in a COVID-19 Economy**

*Dimitri Stathopoulos, Nuveen Investments*

*Liz Clark, NACUBO*

*Ken Redd, NACUBO*

NACUBO recently surveyed the 2019 NACUBO-TIAA Study of Endowments institutional participants to learn more about the impact of the COVID-19 crisis on endowment values and investment and spending strategies. NACUBO found that during the first quarter of 2020, colleges and universities experienced an average loss of 13.4 percent in endowment values and, on average, 20 percent of endowment funds were underwater. During this roundtable, explore actions taken by institutions to reduce expenses related to the endowment or foundation and steps taken to respond to current pressing needs of students and institutions.

**CPE Category: Management Services**

### **Roundtable: Leases, Long-term Debt and Financial Responsibility Composite Scores**

*Jessica Swingle, Wilkes University*

*Sue Menditto, NACUBO*

*Mary Wheeler, NACUBO Consultants and Speakers*

New financial responsibility rules are effective July 1 for independent not-for-profit institutions. The new rules bring new reporting and tracking requirements for leases and long-term debt. Business decisions will bring reporting, documentation, and analytical challenges. Join your colleagues in a roundtable that explains Department of Education rules related to lease grand-gathering, construction-in-process, renegotiations, and refinancings. Participate in conversation on these and related issues.

**CPE Category: Accounting**

### **System Business Officers Roundtable: Planning for Fall 2020 and Beyond**

*J. Michael Gower, Rutgers, The State University of New Jersey New Brunswick Campus*

Academic year 2019-2020 was unlike any we have seen. What will the next year hold? Connect with system business office colleagues to discuss business and financial management issues. Share your thoughts about today's challenges and tomorrow's uncertainties.

**CPE Category: Specialized Knowledge**

4:00pm **END OF DAY 1**

## **TUESDAY, JULY 14**

11:00am-12:00pm **CONCURRENT SESSIONS**

### **Energy Asset Monetization: Transforming Utility Cost Centers into Strategic Assets**

*Russ Grunebach, Duquesne University*

*Stephen Auton-Smith, Ernst & Young LLP*

*Sameer Qureshi, Clearway Energy*

Duquesne University recently monetized its energy assets under a public-private partnership and entered into a 40-year energy services agreement with Clearway Energy. Using this transaction as an example, the speakers will explore the relative merits of utility system outsourcing and monetization in both unlocking economic value and helping institutions achieve operational resilience, sustainability, and modernization of infrastructure. They'll discuss transaction practicalities and considerations, stakeholder engagement, key challenges, and success factors for forging a long-term partnership.

**CPE Category: Finance**

### **How Student Financial Services Can Lead Collaboration to Support Student Success**

*Chris Foster, University of North Texas*

*Joey Saxon, University of North Texas*

Learn about the Start Green, Stay Green program launched in 2019 by the University of North Texas to improve student success. A key component: Student financial services worked beyond boundaries to serve as the catalyst for collaborative change. The speakers will demonstrate the dashboards designed to highlight students with balances, which are shared with various departments to increase communication and target outreach.

**CPE Category: Specialized Knowledge**

### **The Power of Financial Modeling**

*Kelli Shomaker, Auburn University*

*Alice Turbiville, Swarthmore College*

*Michael Nicolescu, PFM Group*

Financial models can serve as the basis for telling the story of long-term changes at your institution and help identify potential problems before adverse effects occur. Hear about the benefits two institutions derived from implementing an integrated, comprehensive financial model, including the expansion of leadership's understanding of variables pertaining to financial risk and volatility. The speakers will also discuss how a multi-year financial plan contributes to strong, robust financial management.

**CPE Category: Finance**

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

### **Driving Innovation with a Managed Services Technology Provider**

*Nicole Trufant, University of New England*

*Robert Cominsky, Ellucian*

The University of New England is growing, and with that growth come the challenges of scale. To support this growth, business processes must evolve, student experiences must improve, and technology must play a role in it all. In this session, learn how strategic partners can help transform IT into a driver of efficiency and innovation that positively impacts the bottom line and how UNE is providing itself the agility and flexibility needed to both prepare for and help shape the future landscape of higher education.

**CPE Category: Information Technology**

### **Hot Legal Topics: Liability Issues in the Age of COVID-19 and Update on Foreign Influence/Foreign Gift and Contract Reporting**

*Stephanie Gold, Hogan Lovells US LLP*

*James Keller, Saul Ewing Arnstein & Lehr, LLP*

Join higher education legal experts for a discussion of current issues and challenges in the areas of liability issues in an era of COVID-19, and foreign influence matters/foreign gift and contract reporting. The session will provide the latest information about the range of liability issues that have arisen as institutions consider a return to campus in the future; and the latest news about foreign influence and gift reporting as colleges and universities navigate this Department of Education directive.

**CPE Category: Business Law**

## **Once Upon a Financial Statement...Telling Your Institution's Financial Story**

*Leslie Brunelli, University of Denver*

*Mandy Kibler, University of South Carolina Columbia*

*Jean Bushong, CliftonLarsonAllen LLP*

As we move forward in higher education, telling our financial story must evolve! Considering Coronavirus, it is especially important that our stakeholders understand financial position and its impact on future decisions of the institution. Panelists from public and private institutions will address how financial stories can be illustrated through audited financial statements. Special attention will be devoted to Management's Discussion and Analysis, understanding financial reporting audiences, what rating agencies needs to know, principles of benchmarking and the importance of KPIs, functional expenses, and explaining operating results.

**CPE Category: Accounting**

### 3:00-4:00pm **ROUNDTABLES**

#### **New to Higher Education Roundtable**

*Mary LaGrange, University of Nebraska at Lincoln*

*Randy Roberson, NACUBO*

Administrators new to higher education face numerous challenges. If you have worked in higher education for fewer than three years, join us at this interactive session to connect with colleagues and discuss the complexities and nuances of navigating the college or university environment.

**CPE Category: Specialized Knowledge**

#### **Business Officers of Color Roundtable**

*Darrell Bazzell, The University of Texas at Austin*

*J. Carlos Hernandez, Sam Houston State University*

*Jamie Moffitt, University of Oregon*

*Liz Clark, NACUBO*

*Tadu Yimam, NACUBO*

NACUBO's Strategic Blueprint includes a commitment to developing an initiative to strengthen diversity, equity, and inclusion principles in the higher education business community. How should business officers evaluate practices and policies and examine the extent to which advancing diversity and inclusion and identifying and closing equity gaps is in the fabric of who we are and what we do? How should NACUBO and the higher education business office community better reflect the diversity of our nation in membership and in action? What is the role of business officers, as part of the president's cabinet, to be involved in the critical conversations about race and diversity that affect the campus as a whole?

**CPE Category: Specialized Knowledge**

#### **Roundtable: Safeguarding Higher Education Through Technology Strategic Planning**

*David Hinson, Drury University*

*Rajiv Shenoy, Apogee*

*Jim Hundrieser, NACUBO*

Higher education, and life, will now be forever seen through the eyes of "before COVID-19 and after." Every institution needs to know and document what separates them from other universities – the physical, programmatic, technological, diversity, and other attributes that make their institution and its mission so unique – and imagine what the next year or two would ideally look like.

Apogee has studied 500 strategic plans from colleges and universities around the country. This roundtable will explore the findings from this study, which reveals that smaller institutions – those with less than 5000 enrollment – aren't engaging in strategic planning as often or as robustly as larger institutions, leaving them in potentially uncompetitive and vulnerable

positions. Smaller institutions tend to pursue initiatives outside of core areas, which Apogee found resulted in opportunity costs that have likely impacted them financially during the Covid-19 crisis.

**CPE Category: Finance**

### **Roundtable: Exploring the Regulatory Hurdles of Expanding Online Education to International Students**

*Kimberly Hoebel, Purdue University*

*Crystal Seibert, Purdue University*

As the COVID-19 pandemic forces all colleges and universities to increase their online offerings, and cope with declining national enrollment, many schools will look to expand their online educational offerings overseas to reach new students and address revenue shortfalls. This roundtable offers the chance to discuss the complexities of complying with both U.S. and international regulatory requirements when operating abroad and assess the potential for strengthening an institution's bottom line while providing quality education to a new group of students.

**CPE Category: Specialized Knowledge**

### **Roundtable: Managing Athletics at Smaller Public and Private Colleges**

*Susan Maddux, Furman University*

Although the general public may not associate athletics with smaller and mid-sized colleges and universities, insider experts understand their importance. Whether to watch or play, athletics are valuable amenities that attract students. Participate in a discussion that addresses enrollment, social distancing, safety, fiscal, and other overarching concerns and operational challenges athletics may pose in academic year 2020-21.

**CPE Category: Specialized Knowledge**

### **Roundtable: Modeling to Understand and Evaluate Academic Costs**

*David Gray, Pennsylvania State University*

*Dennis Morrone, Grant Thornton LLP*

*Matt Unterman, Grant Thornton LLP*

The pandemic and recession will have lasting implications for colleges' and universities' budgets. As institutional leaders navigate this complex situation, it will be important for them to understand cost drivers of educating students. What approaches are institutions taking to understand and evaluate academic costs? How can data and analytics support decisions?

**CPE Category: Finance**

### **Roundtable: RCM in the COVID-19 Environment**

*Aimee Heeter, Indiana University*

*Amir Rahnamay-Azar, Syracuse University*

*Steffon Gray, NACUBO*

With many colleges and universities projecting enrollment declines and budget shortfalls as a result of the COVID-19 pandemic, prudent and flexible resource allocation is paramount. Can RCM offer university leaders the flexibility necessary to overcome these challenges? This roundtable will discuss RCM strategies that can guide current and future resource-allocation decision making. Participants will discuss budget retrenchment policies, funding formula adjustments, and the impact of funding on academic planning.

**CPE Category: Finance**

4:00pm **END OF DAY 2**

## **WEDNESDAY, JULY 15**

11:00-11:15am **Looking Back at the Past Year**  
Lynn Valenter, NACUBO Board Chair  
Vice Chancellor for Finance and Operations  
Washington State University, Vancouver

11:15am-12:15pm **Washington Update**  
*Steven Bloom, American Council on Education*  
*Emmanuel Guillory, United Negro College Fund, Inc.*  
*Megan Schneider, NACUBO*

Explore the current state of play in the nation's capital. Panelists will discuss major legislative and regulatory actions that have impacted colleges and universities in light of the COVID-19 pandemic, including Coronavirus Aid, Relief and Economic Security (CARES) Act funding and regulatory requirements, and the potential for additional higher education relief provisions in future COVID-19 legislation. We'll also explore other legislative and regulatory issues of importance to colleges and universities including the DACA Supreme Court decision, changes to Title IX regulations, the creation of new foreign gift reporting requirements, and more.

**CPE Category: Specialized Knowledge**

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

**Cost Standardization: Key Considerations to Enable Advanced Analytics**

*Steven LaNasa, Johnson County Community College*  
*Adam Raab, Embry-Riddle Aeronautical University*  
*Mark Lemon, Grant Thornton LLP*  
*Anthony Pember, Grant Thornton LLP*

Cost and revenue analytics help institutions to better understand their financial position, identify key management challenges, and design and deploy effective solutions. When developing such a model, leaders must consider factors such as institutional characteristics, capacity for change, and management questions being asked as each will impact the model's complexity and precision. Panelists will outline considerations for developing a cost and revenue management model, discuss common challenges, and offer a decision matrix for designing a model that aligns with higher education cost management principles.

**CPE Category: Finance**

**Return on Mission: The University of Colorado-Boulder Financial Futures Initiative**

*Carla Ho-a, University of Colorado Boulder*  
*Ann Schmiesing, University of Colorado Boulder*

Launched in 2018, the Financial Futures initiative at the University of Colorado—Boulder has generated more than 600 new ideas for revenue generation, cost savings, and cost avoidance with an estimated \$90 million—and growing—in recurring annual impact. Hear how the initiative has yielded stronger collaborations among academic and financial officers, provided a new model for evaluating strategic investments of resources, improved financial resilience, and transformed the university's culture of resource decision making. Speakers will also discuss how the COVID-19 pandemic is influencing priorities and next steps for this initiative.

**CPE Category: Finance**

**Successful System and Member Institutions Relationships**

*William Huang, University of Texas System Administration*  
*Vanessa Kenon, The University of Texas at San Antonio*  
*Aaron LeMay, University of Texas Medical Branch*

The future of public higher education depends on finding a balance between leveraging central services provided by a system office and maintaining the member institutions' local autonomy for decision making. Speakers will discuss initiatives the University of Texas System has implemented to reduce administrative burden, including collaborative support for technological innovation.

**CPE Category: Business Management and Organization**

3:00-4:00pm **ROUNDTABLES**

**Academic Unit Business Officers Roundtable**

*Kimberly Goodwin-Slater, George Mason University  
Eric Leal, American University*

Academic year 2019-2020 was unlike any we have seen. What will the next year hold? Connect with fellow academic unit business officers to discuss business and financial management issues such as the expanding role of data analytics, demonstrating a commitment to diversity and inclusion within your unit, or managing the challenges of a new IT system. Share your thoughts on topics that are most important to you.

**CPE Category: Specialized Knowledge**

**Primary Representatives Meeting**

Invitation-only

*\*No CPEs for this session\**

**Roundtable: Challenges in Financial Reporting Post-COVID-19 (Public Institutions)**

*Tom Ewing, The Ohio State University  
Anita Kovacs, Florida State College at Jacksonville  
Robert Kuehler, University of Colorado System Office*

A global pandemic, national emergency, campus closures, new federal programs and funding have created planning, resource allocation and operational questions. COVID-19 will also impact financial reporting. Audited financial statements belong to the institution and can be an important communication vehicle. There are disclosure, presentation, and MD&A options that colleges and universities can and should consider. Participate in a thought-provoking dialogue on a topic that can be more interesting than it appears on the surface.

**CPE Category: Accounting**

**Young Professionals Roundtable: Career Advice for Success in Higher Education**

*Jeremy DiGorio, Rollins College  
Jamie Loftin, University of Arkansas  
Mark Saine, TIAA*

As seasoned higher education professionals ascend in their careers or near retirement, there is an ongoing need for young professionals to fill the talent gap. Are you ready to step up? Join this roundtable to learn from peers and seasoned leaders how to hone the skillset needed to advance your career.

**CPE Category: Professional Development**

4:00pm **END OF DAY 3**

## **THURSDAY, JULY 16**

11:00am-12:00pm **CONCURRENT SESSIONS**

**Investing in Veterans' Education**

*J. Michael Haynie, Syracuse University  
Amir Rahnamay-Azar, Syracuse University  
Julia Carlton Mackay, Sasaki Associates, Inc.  
Mary Anne Ocampo, Sasaki Associates, Inc.*

Through a case study, hear how one institution has strengthened its commitment to veterans by delivering unique programs in career, vocations, and entrepreneurship education to “serve those who have served.” Syracuse University developed its Campus Framework to guide strategic planning initiatives that support post-traditional students and their unique needs. One initiative is the National Veterans Resource Center, a capital project that houses the Institute for Veterans and Military Families, which undertakes academic research and actionable programming to advance the social, economic, and wellness concerns of veterans and their families.

**CPE Category: Specialized Knowledge**

### **Lessons Learned: FASB Revenue Recognition and Grants**

*Jason Schroeder, University of Notre Dame*

*William Sibert, Cornell University*

*Karen Sodoma, University of Rochester*

*Rick Cole, BKD CPAs and Advisors*

Now that colleges and universities FASB’s revenue recognition and grants and contributions accounting standards, it’s time for a de-brief. Hear how others across higher education are mitigating the most difficult obstacles and understand how guidance applies to CARES Act grants and programs. Speakers will revisit significant requirements and decision making on the adaption of the standards, share lessons learned, and talk about considerations for 2020 and beyond.

**CPE Category: Accounting**

### **State Budget Outlook**

*Emily Brock, Government Finance Officers Association*

*Michael Leachman, Center on Budget and Policy Priorities*

*Liz Clark, NACUBO*

State budgets will be squeezed by the adverse economic forces resulting from the effects of the COVID-19 pandemic. The outlook is grim and a deep economic downturn is likely to have sizeable consequences for state funding for education and other services. This session will explore the extent to which unemployment and declines in state income and sales taxes are expected to open and deepen state budget gaps. Is additional federal relief on the way and how might federal legislative and regulatory activities impact state and local governments as they try to respond to the economic fallout?

**CPE Category: Specialized Knowledge**

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

### **Is it Time to Rethink our Approach to Mitigating Cybersecurity Risk?**

*Cathy Hubbs, American University*

*Douglas Kudravetz, American University*

*David Swartz, American University*

*Cole Clark, Deloitte Consulting LLP*

*Richard Rudnicki, Deloitte & Touche*

The scope, scale, and pace of change in the cybersecurity area pose a nearly unwinnable “arms race” for higher education. In this session, speakers will share results from a recent initiative to assess the totality of the enterprise resources applied to cybersecurity and explore possible alternative approaches. They will also highlight opportunities to strategically augment cybersecurity services and, through analytics, leverage economies of scale to reduce the time from awareness to mitigation.

**CPE Category: Information Technology**

### **An Innovative Way to Redesign a Retirement Investment Menu**

*Hugh Penney, Yale University*

*Laura Sines, TIAA*

Retirement plan sponsors are grappling with new participant demographics, which call for an evolution in investment menu design to meet the dynamic needs of aging baby boomers, mid-career employees, and millennials. From rethinking existing options to considering new products, this session will focus on redesigning plans for future participants' needs. Learn how Yale University recently redesigned its retirement plan's investment default to maximize benefits, and review the plan's metrics before and after Yale made the change.

**CPE Category: Finance**

### **Rip Off the Band Aid: Simultaneously Deploying New Budgeting and Organizational Models**

*William Nunez, University of Nebraska at Lincoln*

*James Volkmer, University of Nebraska at Lincoln*

*Greg Bedell, Huron Consulting Group*

*Taylor Jantz, Huron Consulting Group*

One institution's case study can serve as another institution's blueprint for transformative change. Presenters will explore ways institutions can simultaneously combine incentive-based budgeting and organizational redesign to accelerate change. This interactive session will focus on how leaders can rally stakeholders to rip off the band-aid and tackle expansive change head on. Panelists will describe how to implement the two models in quick succession, discuss key ingredients needed for dynamic change, and offer solutions to potential roadblocks. Audience member will hear lessons learned, benefits achieved, additional efforts needed to sustain success, and be encouraged to participate in candid conversations that assess the pros and cons of this approach.

**CPE Category: Finance**

## 3:00-4:00pm **ROUNDTABLES**

### **LGBTQ Roundtable**

*Bob Miller, The University of Texas at San Antonio*

*Theresa Pascoe, Stevens Institute of Technology*

How do business officers who are members of the LGBTQ navigate today's higher education culture? How could allies better support the growth, development, and acceptance of more LGBTQ business officers to advance in our field? Discuss these questions from multiple angles, including: the impact on career paths, navigating collegial relationships, and serving as an advocate for other staff and/or students who also are members of the LGBTQ community.

**CPE Category: Specialized Knowledge**

### **Roundtable: Adapting the Physical Campus to Impact the Student Experience in Response to COVID-19**

*Andre LeDuc, University of Oregon*

*Noel Knille, California College of Arts*

*Kevin Rettle, Sodexo*

Social distancing in response to COVID-19 will change the dynamics of how campuses look and feel. How do business officers encourage a friendly atmosphere and keep social distance? What are some of the nitty-gritty items that need to be evaluated and addressed? From scheduling of classes to minimize the size of groups to adopting new cleaning protocols, business officers have many challenges to face.

**CPE Category: Specialized Knowledge**

### **Roundtable: Challenges in Financial Reporting Post-COVID-19 (Private Institutions)**

*Sue Menditto, NACUBO*

*Mary Wheeler, NACUBO*

A global pandemic, national emergency, campus closures, new federal programs and funding have created planning, resource allocation and operational questions. COVID-19 will also impact financial reporting. Audited financial statements belong to the institution and can be an important communication vehicle. There are disclosure and presentation options that colleges and universities can and should consider. Participate in a thought-provoking dialogue on a topic that can be more interesting than it appears on the surface.

**CPE Category: Accounting**

### **Women Chief Business Officers Roundtable**

*Lynn Valenter, Washington State University, Vancouver*

*Andy Brantley, CUPA-HR*

Learn more about women's representation on Chief Business Officer (CBO) teams and in CBO Pipeline positions from CUPA-HR's 2019 Administrators in Higher Education Survey. Discuss some of the hurdles to addressing gender disparity within campus leadership teams while connecting with your female peers to learn how others have tackled professional challenges.

**CPE Category: Specialized Knowledge**

4:00pm **END OF DAY 4**

## **FRIDAY, JULY 17**

11:00-11:15am **Looking Ahead**

Robert Moore, Incoming NACUBO Board Chair  
Senior Vice President, Finance and Administration and Treasurer  
Colorado College

11:15am-12:15pm **Guided by Equity, Informed by Data**

*Lorelle Espinosa, American Council on Education*

Students of color, low-income students, and those first in their family to attend college face a multitude of barriers when it comes to college enrollment and completion. Findings from the American Council on Education project, "Race and Ethnicity in Higher Education," confirm a cause for concern. Yet as sobering as such data can be, they offer opportunities for change, reasons to practice shared- and equity-minded leadership, and benchmarks to measure transformation--Actions that are especially critical given the COVID-19 pandemic and the national racial crisis. This session will provide an overview of the ACE data, and will highlight the important role that college and university leaders, including business officers, have in using data to make decisions that strengthen mission-critical efforts for diversity, equity, and inclusion.

**CPE Category: Specialized Knowledge**

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

### **Connecting Strategy and Data for Actionable Change: A Case Study in Ohio**

*Paul Friga, University of North Carolina at Chapel Hill*

*Mark Polatajko, Kent State University*

Ohio, like many other states, is facing declining enrollments, lower levels of state support, rising costs, and increased regulation and reporting requirements. In 2015 Governor John Kasich embarked on a state-wide experiment to make a college education more efficient and less expensive for students while maintaining or increasing quality. Results, tracked annually, point to Ohio universities recently reporting savings of more than \$320 million. The presenters will reconstruct this journey toward significant savings and describe how the initiative led to positive change on their respective campuses.

**CPE Category: Finance**

### **Lessons Learned from NECHE's Pilot Program for Financial Monitoring**

*Paula Harbecke, New England Commission of Higher Education, Inc.*

*Roger Goodman, The Yuba Group, LLC*

Scrutiny of financially challenged colleges and universities continues to increase. Since the abrupt closure of Mount Ida College in 2018, the New England Commission of Higher Education (NECHE) has strengthened its review of financially fragile institutions. Speakers will review a financial screening tool used for the enhanced monitoring higher education institutions' financial health. As concerns about financially challenged institutions grow, the lessons learned from New England may prove helpful for other regions.

***CPE Category: Management Services***

### **Student Expectations for Fall 2020 and Implications for Higher Education**

*Pam Eddinger, Bunker Hill Community College*

*Daniel Greenstein, Pennsylvania State System of Higher Education*

*Kasia Lundy, Ernst & Young LLP*

EY-Parthenon conducted a national survey of approximately 2,000 college students that captured how student expectations for higher education participation are evolving due to COVID-19. What implications will these student expectations and behaviors have on institutional finances? How will institutions need to adjust in the short-term and in the longer-term? Our panel of higher education leaders will reflect on these broad questions and on their institutions' individual contexts, discuss initial responses to expected enrollment impacts, and consider longer-term strategies to ensure institutional sustainability.

***CPE Category: Specialized Knowledge***

2:30pm **End of Day 5**