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# 2013 annual meeting

## 2013 Annual Meeting: Baltimore Bound!



Plans are now underway for EACUBO’s 2013 Annual Meeting, which will take place October 6–9 at the elegant Baltimore Marriott Waterfront. Easily reachable for all members, Baltimore promises to be full of surprises, and EACUBO encourages members with families to bring them along so they can experience all this lovely city has to offer.

“Baltimore holds a special place in my heart, and I am thrilled to see our Annual Meeting held in my hometown,” Randy Gentzler, EACUBO President, stated.

“Not only that, but our Program Committee has once again over-delivered and has assembled an outstanding selection of both keynote and breakout session presenters. Couple this with the tremendous number of area attractions that are walking distance from the hotel, and this is going to be an event that will go down in EACUBO’s history books!”

Kicking off the three-day meeting will be the annual Executive Summit held during the afternoon of Sunday, October 6. (See page 9 of this newsletter for more

information about the Summit.) Later that evening, the Welcome Reception will take place at Baltimore's amazing National Aquarium, where attendees and their families can enjoy a "strolling supper" and an open bar while meandering through four levels of exhibits featuring Atlantic coral reef and a simulation of life in the open ocean. Attendees will even be able to enter the aquarium's 4D Immersion Theater!

The following day it's back to business, and Jeff Denneen and Phil Kleweno, Partners at Bain & Company, will introduce the first of three General Sessions with a presentation entitled, "The Financially Sustainable University." A study published by Bain & Company revealed that one-third of public and private nonprofit colleges have been on an "unsustainable financial path" in recent years, and another 28 percent are "at risk of slipping into an unsustainable condition." Both gentlemen will discuss the findings of this fascinating and eye-opening study during their presentation.

Other featured keynote speakers include David Hales, President

of Second Nature; Dr. Freeman Hrabowski, President of University of Maryland, Baltimore County; and Dr. Joseph J. Thomas, Chair and Distinguished Professor of Leadership Education at the United States Naval Academy. Dr. Thomas has studied, researched, and taught leadership and ethics for over 20 years in the U.S., Europe, Asia, Africa, and the Middle East. A retired Marine, he is the former Director of the John A. Lejeune Leadership Institute and has taught at Notre Dame, the University of Maryland, U.S. Naval Academy, and National Outdoor Leadership School. He has published numerous articles and books including the texts "Leadership Explored" and "Leadership Embodied."

A wide range of breakout sessions has also been carefully selected to appeal to the diverse interests of our attendees, including a sampling below:

- **Study Abroad: Risks and Solutions.** Preparing students, faculty, and staff for study abroad programs is a two-pronged process: orienting them with information on what to do when

2012–2013

# board of directors

## Officers

### President\*

Randall Gentzler  
VP, Finance and Treasurer  
Loyola University Maryland

### First Vice President\*

J. Michael Gower  
VP, Business Affairs and Chief  
Financial Officer  
Yeshiva University

### Second Vice President\*

Lynne Schaefer  
VP, Administration & Finance  
University of Maryland  
Baltimore County (UMBC)

### Treasurer\*

Karen VanDerhoof  
VP for Business and Finance  
County College of Morris

### Secretary\*

Annemieke Martinez  
AVP and Chief Business  
Officer, Main Campus  
Georgetown University

### Immediate Past President\*

Roger Stackpoole  
VP, Finance and Administration  
Le Moyne College

### Second Past President

Ken Cody  
Vice President Administration  
and Business/Treasurer  
Bentley University



## Directors At Large

Robert Helfman  
Director, Management Analysis  
University of Pennsylvania

Michael J. Lochhead  
VP, Administration & Finance  
College of the Holy Cross

Louis J. Mayer  
VP for Financial Affairs  
St. Joseph's University

Maureen Murphy  
VP, Administration & Finance  
Emerson College

Karen Pedano  
Assistant Controller  
Widener University

Sue Perkins  
VP for Finance  
& Administration  
Middlesex County College

Jennifer M. Sauer  
VP for Finance &  
Administration  
Immaculata University

Basil A. Stewart  
Controller  
Massachusetts Institute  
of Technology

## Appointed Positions

### Historian

Therese Sampson  
Atlantic Cape  
Community College

### Information Coordinator/ Communications Chair\*

Ann Spencer  
Virginia Tech

### Site Coordinator\*

John Palmucci  
Loyola University in Maryland

\* Executive Committee

a crisis occurs, and providing them with the tools necessary to deal with those issues when they occur.

- **“Tax Exempt” is an Oxymoron: Tax Alert for Colleges and Universities.**

As federal and state governments face ever-increasing budget deficits, they are looking to income taxes, payroll taxes, sales and use taxes, annual registrations, and penalties as untapped revenue sources. An understanding of the federal, state, and global tax landscape is no longer limited to the business office and the Audit Committee.

- **Transatlantic Best Practices in Institutional Efficiency and Effectiveness.**

Hear about the findings of a Fulbright Educational Experts seminar series conducted in Germany in the fall of 2012 and designed to identify best practices in “doing more with less” at German and American universities. Over the past decade, German public institutions have restructured administrative and academic processes in the wake of post-secondary education system and Bologna process reforms.

- **Determining Adequate Reserves for your Organization.**

Having either too many or too few liquid assets on an organization's balance sheet may negatively influence donor perception, impact attainment of mission-related objectives, or put the organization at operational risk. Establishing a reserves strategy for your organization does not merely mean tucking away some funds for a rainy day.

The traditional Accounting & Audit and Tax Updates will be offered as well, along with extensive networking opportunities and a trade show floor chock-full of new products and services designed to enhance the service offerings available to you, as well as increase your department's productivity. A complete list of all the breakout and general sessions can be found at [www.eacubo.org](http://www.eacubo.org).

The Baltimore Marriott Waterfront is ideally located at the Inner Harbor, where you will find the most tourist attractions, including the National Aquarium in Baltimore, the USS Constellation, and the Maryland Science Center. After exploring the harbor, attendees can even hop on a nearby water taxi to get to areas such as Fells Point and Little Italy.

Baltimore—the colorful, diverse city that is Maryland's largest city and economic hub—is known for its beautiful harbor; quirky, distinct neighborhoods; unique museums; and the world-renowned Johns Hopkins Hospital to the east and the University of Maryland Medical Center to the west.

Registration for the 2013 Annual Meeting can be done quickly and easily online at [www.eacubo.org](http://www.eacubo.org). Also, be sure to keep an eye out for upcoming notifications about early-bird specials for members and non-members alike, allowing early registrants to save their institutions' valuable resources at a time when money is in short supply.

“I am very excited and honored to welcome our membership and their families to the city I call home, and promise that Baltimore will far exceed your expectations for this industry-leading event,” Gentzler concluded. ☀

# from the president



Dear Colleagues:

These last several months have been extremely productive for me and for the Board as a whole. I want to utilize most of this column to focus on the ongoing work that E4 has collaborated on with us, including adopting EACUBO's new mission.

But first, I want to meander a bit on a personal note and tell you how excited and proud I am that my University's hometown — Baltimore, Maryland — will be the location of our 2013 Annual Meeting from October 6–9. Baltimore has so much to offer and I encourage you not only to attend this invaluable meeting yourself, but also to bring your family along to partake in the many exciting venues in this city! More about the Annual Meeting and some fun facts about Baltimore can be found in another article in this newsletter that previews what we have in store for our membership in October.

On June 7, EACUBO's Board and Governance Committee convened its own meeting with E4, and five primary topics were covered: (1) A Best Practice Approach, (2) Drivers of Relevancy, (3) Business Model Elements, (4) Leadership Mindset, and (5) Governance for the 21st Century. I'm going to try to summarize the key takeaways from each of these below.

## A Best Practice Approach

For EACUBO to take a best practice approach means enhancing our leadership and governance structure and execution to become a higher performing Board and professional association overall. This means we must learn from external audiences and the marketplace. E4's initial research was based on this principle.

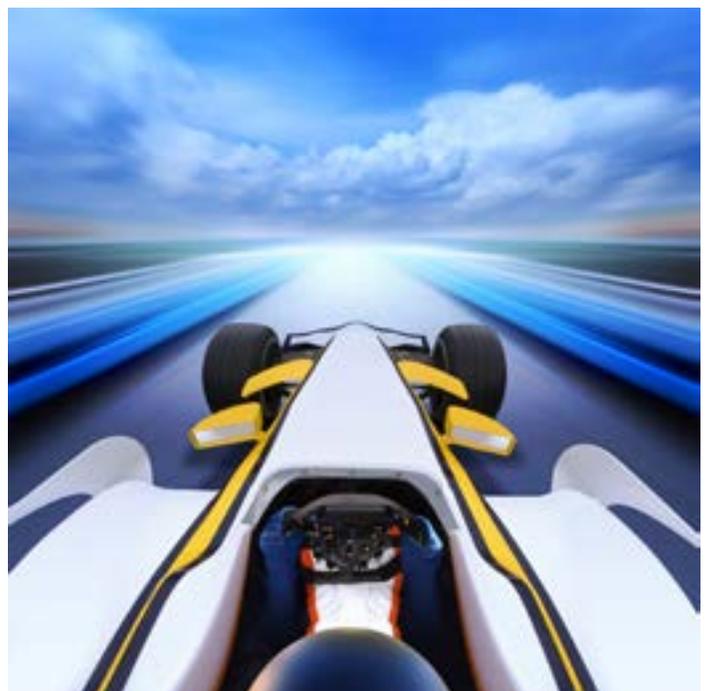
Second, we must not start with governance; we must end with it. In order to do this, we must incorporate the best practice of ensuring that the underpinnings of governance are solid and well thought out as it relates to our Mission, Vision, Envisioned Future, and Value Proposition. One best practice brought to the table by E4 was that, "As important as governance is and its foundation, if the organization cannot execute, it is for naught."

## Drivers of Relevancy

The first and foremost driver of relevancy for any successful organization is its Mission Statement. With the collaboration of E4, the Board adopted a new Mission Statement at this meeting:

"We prepare and support financial and administrative leaders as pivotal strategic partners enabling their academic institutions to thrive."

To fully appreciate the significance of the new mission statement, you need to understand how we define two key terms. We define "leaders" as less about a



role or title, and more about a mindset. In fulfilling our mission, EACUBO equips and furthers a leadership mindset among financial and administrative employees regardless of their position or title in an institution. We define “strategic” as a way of thinking that can and should occur at all levels of an institution. Being strategic is not relegated only to the boardroom or upper echelons of the institution.

Our Board and Governance Committee is working long and hard to develop an envisioned future for EACUBO so that we are perceived as relevant, bold, and critical to our members’ growth and success. With events such as our Annual Workshop in the spring and our Annual Meeting in the fall, we are providing the opportunity for strategic leaders to explore relevant problems with like-minded colleagues in a unique learning environment to ensure their success and the success of their institution.

Our long-term envisioned future is one in which EACUBO is considered the “go-to” association for creating strategic finance and administration leadership within higher education.

### **Business Model Elements**

E4 reviewed several crucial elements of our business model, which I will touch on below:

1. Value Proposition — our value proposition will meet our constituents’ needs and desires when the association is seen as an invaluable resource.
2. Customer Segments — these include financial and administrative leaders as well as aspiring leaders, with an “all are welcome” mentality.
3. Key Partnerships — we must view all of our partnerships from a strategic perspective and further leverage our existing relationships.

### **Leadership Mindset**

Facilitated by E4, we took a deep look at some guideposts to maintaining a leadership mindset

and realized that leadership is an “inside-out” phenomenon. These include realizing that we are creating our experience – moment to moment – via our thinking, we are always feeling our thinking, and we can have a new thought at any moment.

I know this sounds a bit fluffy, but it’s easily put into practice through self-reflection and awareness. In this segment of the meeting, the Board took time to ask ourselves the following questions:

- Am I results centered?
- Am I internally directed?
- Am I “others” focused?
- Am I externally open?

Answering these questions allowed us to see the bigger picture and analyze our current state of being.

### **Governance for the 21st Century**

The final segment of our daylong collaboration with E4 focused on governance and the challenges associated with it. We defined governance as the act of governing, as well as the process of decision-making and the process by which decisions are implemented. Governance involves leadership and decision making. It relates to consistent management, cohesive policies, guidelines, processes, and decision rights.

Utilizing E4’s expertise with governance, we realized several key takeaways. First, a governance model must intervene to guarantee a market-like, external responsiveness. In order to enable such an outcome-driven organizing system, all functions and decisions need to be rigorously weighed against our newly adopted Mission Statement.

We also learned we must separate large issues from small ones and that it is crucial to optimize the richness of diversity in board composition and opinion, while assimilating that diversity into one voice.

# from the president (continued)

Last, we realized that we must define a common basis for discipline. Boards, including our own, sometimes have a difficult time sticking to a job description, being decisive without being impulsive, and keeping the discussion at hand on point. At the end of the day, governance should facilitate self-discipline.

At the end of the meeting, E4 prepared a list of observations related to EACUBO's own governance, many of which provided constructive criticism including the fact that we needed to better engage our membership. The Board and Governance committee will be meeting several times between now and the Annual Meeting to finalize its thoughts and recommendations. It is our goal to bring forth to the membership a slate of proposed changes that will allow EACUBO to move toward a relevant and exciting envisioned future and continue to be a thriving association. I will share the outcome of these remaining meetings and board decisions with you in a future column and in person at our annual meeting in Baltimore.

I am very pleased with the work of E4 and look forward to providing you with more details as we progress further. On that note, we made the decision to feature E4 in this newsletter as our "Spotlight Institution" so you can better understand just who they are as an organization and better appreciate the vast amount of guidance they have provided me and EACUBO's Board since June 2012.

I look forward to seeing all of you and your families this October as we convene our Annual Meeting in Baltimore. Enjoy the remainder of your summer!

Regards,



Randall "Randy" Gentzler

## Baltimore Fun Facts

Did you know...

- Baltimore's nickname is Charm City?
- It is an independent city and is not part of Baltimore County, which surrounds it? It has a population of more than 620,000.
- During the 19th century, Baltimore was the second-largest port city for immigrants coming into America?
- Edgar Allen Poe once lived in Baltimore? The very first monument in his honor was erected in Baltimore.
- Our national anthem was written in Baltimore by Francis Scott Key during his imprisonment?
- Thurgood Marshall, the first African-American Supreme Court Justice, was born in Baltimore?
- Baltimore was the birthplace of Babe Ruth?
- Several popular TV series were filmed and based in Baltimore, including Homicide, The Wire, and The Corner?
- America's first Catholic Cathedral is located in Baltimore?
- Baltimore is home to the first permanent monument of George Washington?
- In 1854, the first telegraph line was erected between Baltimore and Washington, D.C.?

## E4 Exchange

At its June 2012 meeting, the governing board of the Eastern Association of College and University Business Officers discussed the relevance of EACUBO and industry associations in general in the 21st century. The Board recognized the need to reconsider the role of industry associations, and specifically EACUBO, given the evolution of professional development, networking, and information dissemination options available to higher education administrators. It agreed that it must focus on envisioning how EACUBO will remain relevant for its members given the complexity and pace of change and the emergence of opportunities and challenges throughout our industry.

At this same meeting, the Board approved a focused initiative to re-envision EACUBO in the 21st century and develop its leadership and governance strategies to achieve its vision within this evolving context. The Board also approved the hiring of a consultant to guide us in our process. It appointed a Selection Committee to issue an RFP and determine which firm was best suited to assist EACUBO, and authorized the Executive Committee to approve the selection and contract with the consulting firm. The RFP was issued on August 24, 2012 to six firms, and four firms submitted proposals. In early October, the Executive Committee approved the Selection Committee's unanimous recommendation to retain E4 Exchange, Inc. to provide these advisory services. E4 helped kick off this exciting initiative by leading a retreat with the Board and a number of other member volunteers in Boston just prior to the 2012 Annual Meeting.



EACUBO's newsletter editor sat down with E4 for a brief Q&A, so its members could get a better idea of who they are and what they do.

### **Tell us a little about your background and what exactly you do.**

We are a strategic consultancy specializing in strategic planning, organizational alignment, business model generation, governance, and facilitation. We've been in business for 25 years now and are based in Lancaster, PA. Our primary sector experience is in higher education, nonprofits, healthcare, manufacturing, and entertainment.

### **Can you describe in detail your collaborative efforts with EACUBO?**

EACUBO realized that with the rapid pace of change, the complexity of the challenges that face the financial and administrative leader in higher education, and the growing demands on the leader to go beyond the traditional borders of finance and administration within

their institution, a new association model was needed in order to remain relevant and essential to the finance and administrative leader. This led to EACUBO engaging us. Their charge? Partner with us to develop an envisioned future that will meet the realities of the 21st century. Through the process, we have developed into a key strategic partner to EACUBO.

### **Why did you choose the name E4?**

E4 derived its name based on four principles that form the driving force in all that we do: Energize the organization; Elevate thinking beyond an operational mindset; develop strategies and plans that are Executed; set the stage for organizations to Excel. E4 Exchange has served a variety of sectors for 25 years by providing strategic and management consulting in many different ways. Our core services are developing strategic planning and facilitating implemen-

tation, establishing strong governance, defining and improving a client's Business Model to better serve their marketplace, driving organizational alignment, and providing expert facilitation.

**You are very proud of the fact that you have an elephant in your office that's one of the first thing visitors see. Why is that?**

The elephant in our office is there to remind us that it is the "elephants in the room" that are often the greatest impediment to success.

EACUBO President Randy Gentzler had this to add: "One other aspect of E4 for which they are known as they work with clients, is that they help name the elephant in the room. From their experience, every organization has elephants in the room that are the real impediments to advancing the plans and strategies of the organization. As we experienced in our own work with E4, they help name and address the elephants. We are looking forward to sharing the outcomes of our partnership with our members at our October Annual Meeting in Baltimore." ☀



## Leadership in EACUBO: There's a Place for You!



Expand your network of professional colleagues and contribute to your professional development by volunteering your time and talents with an EACUBO committee.

We currently have volunteer opportunities available on all of the standing committees. Interested individuals can view a list of the standing committees and a brief description at [www.eacubo.org/volunteer](http://www.eacubo.org/volunteer).

Committee members are expected to participate in several conference calls throughout the year and in electronic communication as needed. All terms are for three years.

For more information, contact EACUBO at 202.861.2595 or [info@eacubo.org](mailto:info@eacubo.org). We look forward to your participation and welcome the opportunity for you to join one or more of our volunteer committees!

# executive summit

## Changing Demands, New Models

On Sunday, October 6, EACUBO will host its half-day 2013 Executive Summit from noon to 5 p.m., prior to the start of the Annual Meeting at the Baltimore Marriott Waterfront.

With a title of “Changing Demands, New Models,” this year’s summit will explore how changing student demographics will impact higher education. The first portion of the session will be co-facilitated by Bill Hall and Brad Griesbach of Applied Policy Research, Inc.

This half-day, information-intensive Executive Summit is geared specifically for higher education CFOs and their colleagues (including enrollment management executives, provosts, and others who deal with the issue of changing demographics of enrollment); so in order to ensure a high-level interactive session, enrollment will be limited to just 50 attendees.

Over the course of the presentations, attendees will have the opportunity to explore more deeply some of the ways demographic trends will affect the financial viability of higher education institutions, regionally, nationally, and to a smaller extent, internationally.

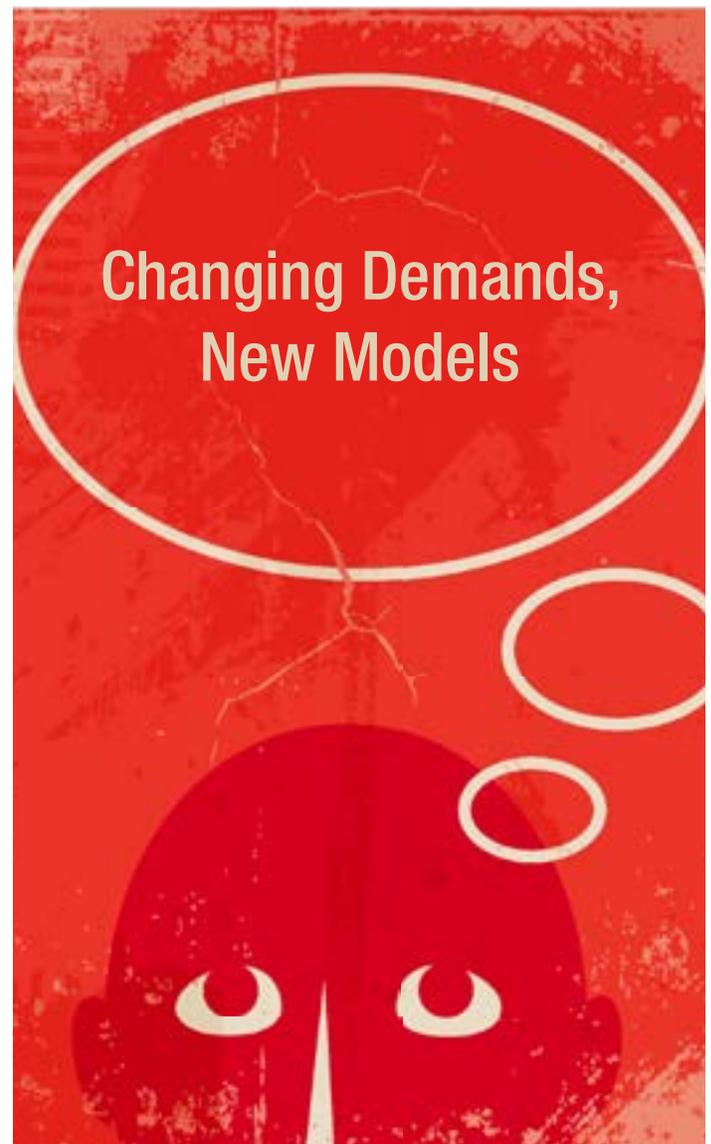
Participants will gain a deeper understanding of transformational models designed to respond to changing demands, resulting in improvements in student outcomes, access, and affordability while maintaining financial viability.

The second portion of the meeting will be facilitated by Doug Lederman, Editor of *Inside Higher Ed*.

In this segment, participants will see firsthand how academic transformation is being achieved at different types of institutions through course redesign and will hear from campus leaders who are trying new delivery models around 2+2 partnerships, competency-based degrees, and more.

The Executive Summit is designed to be a very interactive program, with many opportunities to directly experience and talk to peers about new ideas for responding to this ever-changing industry. Best of all, it’s just \$175 and includes both a sit-down lunch and cocktail reception at the end.

To register for both the Executive Summit and the 2013 Annual Meeting, please visit [www.eacubo.org](http://www.eacubo.org). ☀





Referencing research entitled, “Reclaiming the American Dream: A Report from the 21st Century Commission on the Future of Community Colleges,” April noted one of its recommendations was to increase completion rates by 50% by 2020; preserve access, enhance quality, and eradicate attainment gaps associated with income, race, ethnicity, and gender.

“Improving college readiness is another key recommendation of this report,” April noted. “By 2020, a goal is to reduce by half the number of students entering college unprepared for rigorous college-level work; double the number of students who complete developmental education programs and progress to successful completion of related freshman-level courses. A final goal is to close the American skills gaps by sharply focusing career and technical education on preparing students with the knowledge and skills required for existing and future jobs in regional and global economies.”

The panel then examined fundraising trends and noted that Hispanics, blacks, and Asian-Americans are now using their political muscle in terms of philanthropy. Another trend is that real estate foundations are now being used to manage college/university real estate holdings, build public/private partnerships, and accept gifts of real estate from donors. This is particularly the case at Tidewater Community College and Northern Virginia Community College.

Additional trends in fundraising include the incorporation of mobile phone applications, better usage of analytics, and utilizing social media (including Catapult, Gofundme, Indiegogo, and Kickstarter).

Dillingham then looked at the top 10 reasons why to utilize a separate community college foundation:

1. Increasing Directors’ leadership opportunities
2. Maintaining focus/control: focus on fundraising, not operations
3. Marketing: focused marketing strategy
4. Separating finances: separate funding from government
5. Donor choice: give to a separate entity
6. Investing endowment funds: endowed scholarships and endowments
7. Limiting liability: funds and trustees
8. Borrowing: provides a separate set of collateral
9. Real Estate management: acquire, develop, manage RE projects
10. Fundraising vehicle for foreign colleges: target U.S. donors

“You may choose to invest in future generations of a community college by creating an endowed fund with a foundation. When you designate an endowed fund for your gift, the principal is invested in perpetuity and the earned interest is used as the donor intends,” Dillingham told the audience. “With this single act of generosity, your gift will be an ongoing benefit to students. Your donation’s principle contribution remains untouched with the earnings supporting the programs of your choosing.”

Concluding the session, a presentation of best practices employed by the Community College of Rhode Island was given, with results of increased student success, better workforce solutions, and stronger academic excellence all being demonstrated. 🌟

## Getting the Most Out of Auxiliary Service Providers on Campus

On Friday, March 13 at the EACUBO Annual Workshop in Boston, MA, David Gingerella with Northern Essex Community College and Robert Horowitz of The Berkshire Group gave a very well received breakout session that examined how member institutions can get the best 'bang for their buck' from third-party providers on their campuses.

Horowitz began the session by stating, "Today's economic challenges on campus have put pressure on us to limit increases in fees, address the potential of declining enrollments, and shift our focus from full-time to part-time students." He continued, "However, in today's environment, both students and staff are demanding state-of-the-art products and brand-name products, and business officers must now take into consideration the ethical challenge of how much is 'too much' to ask for in terms of contributions and/or commissions from outside vendors."

Typical non-tuition-driven revenue sources come from campus bookstores, credit card fees, food services, insurance, vending machines as well as private/

public partnerships, Gingerella explained. "We want our vendors to be very successful, and we need to share that success back with the college."

Horowitz went on to reveal that there are companies that will come to colleges and universities at no net cost and help them with preparing RFPs to manage vendor selection processes, identify partners to increase buying power, negotiate higher commissions or lower costs, and audit final contracts to ensure that the full commission/contribution is being returned to the institution.

One example of an external resource is an energy consultant, Horowitz stated. "Energy consultants can look at natural gas usage and solicit rates from multiple vendors," he added. "They will also review consumption, help you get the best rates, show you peak usage times, suggest ways to reduce demand and even help find rebates and grant programs to help offset capital costs." Other external resources include telecommunications consultants who will examine cellphone usage, determine the best plans, and review the constant changes to rates.

He went on to explain that, when looking at auxiliary services' revenue enhancement opportunities, they should consider specific characteristics, including:

- Recurring revenue stream for at least five years
  - Little or no management, supervision, or allocation of labor costs
  - No allocation of repair, maintenance, or other operational costs
- Significant revenue opportunity as defined by the institution
- The ability to hire outside consultants to "do the work" at no "net cost" to the institution

“Remember that one size does not fit all when developing a business plan,” Horowitz continued. “You must identify stakeholders, determine if the primary focus is revenue-related or service/product-related, and then survey the campus to determine potential services and products.”

Gingerella then turned to his own institution (NECC) and used a scenario in which they were forced to modernize both of its outdated bookstores (one on a rural campus and the other in the inner city) with little capital outlay. Challenges they faced were whether to allow it to self-operate or have it run by a third



party, whether to include a café, and then determining the campus needs and whether they will be met.

The comprehensive RFP resulted in two extremely competitive bids:

- Winning bidder proposed a capital outlay to build out stores on both campuses
- A name-brand coffee shop was included in both proposals
- A comprehensive convenience store was to be located on both sites
- Overall commission increased significantly to the college
- Overall cost of books to the students significantly decreased. ☀️

## Industry Happenings

- Frederick A. Rogers of Carleton College (Minnesota) was selected as the 2013 recipient of NACUBO’s 2013 Distinguished Business Officer Award.
- Member institutions SUNY Canton/SUNY Potsdam and University of North Carolina at Chapel Hill were recipients of the prestigious 2013 NACUBO Innovation Awards.
- Longtime EACUBO volunteer Joe Trainor, formerly VP for Finance at University of the Sciences in Philadelphia, has accepted the CFO position at Wistar Institute in Philadelphia.
- NACUBO acknowledges the service of Lynn Coleman (Howard Community College), Ruth Constantine (Smith College), and Roger Stackpoole (Le Moyne College) as NACUBO board members who recently completed their terms.

**Receive a promotion? Get a new job? Win an award? Let us know!**

**Email [info@eacubo.org](mailto:info@eacubo.org) and we’ll post the good news on our website for everyone to see!**

# annual workshop general session recap

## The Ethics of Complying with the Clery Act and Title IX



Dolores Stafford, President and CEO of D. Stafford & Associates, kicked off the first day of the 2013 Annual Workshop in Boston, MA, on Wednesday, March 13 with a General Session that examined the ethics of complying with the Clery Act and Title IX. The session, which was very well received, helped

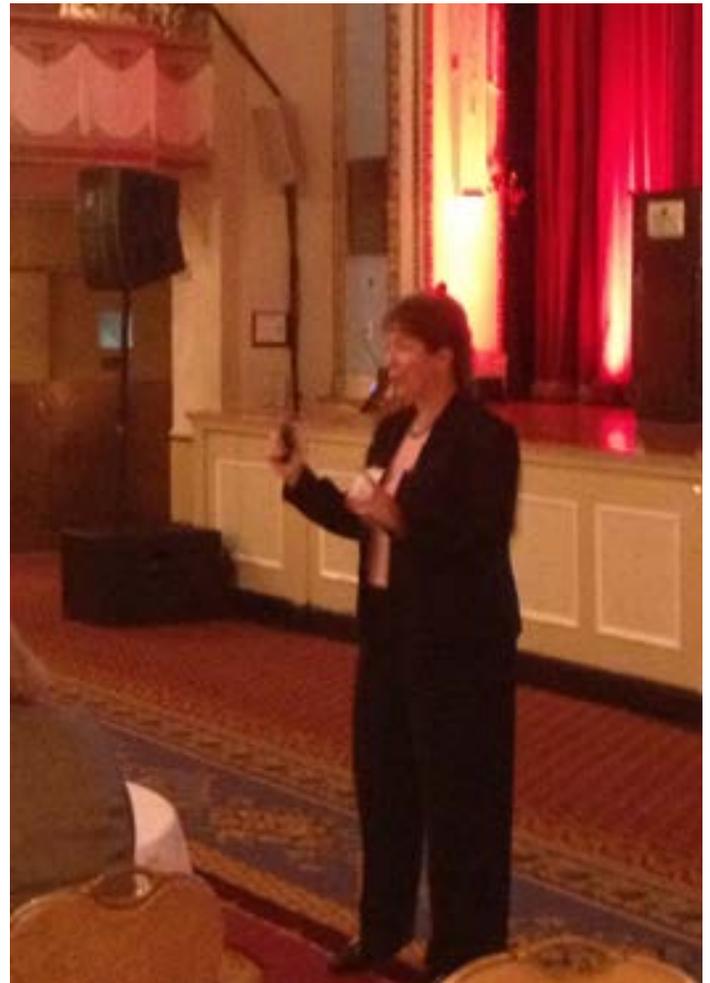
attendees tread these waters by presenting solid guidance on compliance with both the Clery Act and Title IX. Failure to comply can result in astronomical fines and restrictions thrust upon an institution. This session provided a solid overview of the Clery Act and examined key questions that business officers should ask their colleagues on campus about the institution's compliance efforts.

Ms. Stafford was the Chief of Police at The George Washington University in Washington, DC, from 1992–2010. During her 26-year distinguished career in the law enforcement and security industries, she served as a police officer, Sergeant, Assistant Chief, and Chief. She worked in Campus Law Enforcement for 23 years at Bucknell University, Butler University and, most recently, at The George Washington University, where she served as Chief of Police for a 176-member police department for 18 years. Chief Stafford retired from active law enforcement on May 5, 2010. She has a Bachelor's Degree in Criminal Justice from Mansfield University and a Master's of Science Degree in Education from Bucknell University. Chief Stafford is also a Certified Litigation Specialist.

EACUBO President Randy Gentzler thanked all the Annual Workshop's sponsors and then introduced Stafford. She began by telling the audience, "The Clery Act requires colleges and universities to

maintain and disclose information concerning crime on and near their respective campuses. Annual distribution of security reports, access to daily crime logs, timely warning of threats to safety and security, and maintenance of crime statistics are all encompassed in Clery Act compliance. Hate crime reporting, emergency response/evacuation procedures, missing student notification, and fire safety expansion are among recent requirements as amended through the Higher Education Opportunity Act (HEOA) of 2008."

Over the course of the presentation, Stafford noted there were three things campus executives can do to ensure they are properly complying:



## What is the Clery Act?

The Crime Awareness and Campus Security Act, more commonly known as the Clery Act, is contained (along with other security-related disclosure requirements) in section 485 of the Higher Education Act, codified at 20 U.S.C. § 1092. It requires colleges and universities to keep records and report annually on the nature, date, time, and place of crimes occurring on campus, including hate crimes. It also prescribes a number of security-related protocols for emergency response procedures, timely notifications for on-campus crimes and missing students, fire incident reporting, and the like. It is one of the most frequently modified sections of the Higher Education Act, having been amended five times since it was signed into law in 1990.

The requirements of the Clery Act are complex, and require significant coordination and organization among campus officials and administrators. All campuses aspire to provide a safe and secure environment for students and staff, and having solid procedures in place well in advance of a crime or other emergency is imperative to that effort. In the aftermath of a crisis on campus, one of the most common questions is whether the institution properly complied with all state and federal requirements, particularly the Clery Act.

Failure to comply with the Clery Act can result in large fines for an institution (up to \$27,500 per violation), suspension, or limiting of Title IV funding.

- First, familiarize yourself with the basic requirements of the law. Compliance is cumbersome and complex, largely as a result of the changes to the law over time and the 197-page Department of Education handbook released in February of 2011. You can make a campus-wide commitment to compliance by making it a priority and allocating resources accordingly.
- Second, appoint a single person or small committee of senior safety administrators to serve as your Clery Compliance Officer(s) on campus. By its terms, Clery does not dictate that any particular campus officer or group of officers serve in a compliance function, but because non-compliance with the act can result in significant negative consequences, a well-trained person or small group focused on Clery compliance will be of great benefit to your institution. In addition, setting up a clear chain of command is critical, including the responsibilities of each person and how to communicate among the group. Advance planning will be invaluable to you in emergency situations.
- Finally, as a rule of thumb, you should always err on the side of caution when deciding whether a particular incident or event is Clery-reportable; the negative consequences of failure to notify or report can be costly.

To read the Clery Act in its entirety, click here. 

# Area Programming Committee Report

The Area Programming Committee (APC) is pleased to announce that several of the local regions are already actively planning their fall 2013 workshops. Specific details about these programs and other events can be found here: [www.eacubo.org/programs-and-events/local-area-workshops-\(apc\).html](http://www.eacubo.org/programs-and-events/local-area-workshops-(apc).html).

Members should also be receiving additional communication from their regional representatives about these events, so please watch for them in the upcoming months.

For members' convenience, we have listed below some general information so that you and others members of your institution can better organize your calendars.

Region	Date	Location	Comment
Syracuse	October 29	Holiday Inn Syracuse/Liverpool	
Rochester/Buffalo	October 29	University of Rochester's Memorial Art Gallery	
Western Massachusetts/ Connecticut	November 7	Smith College	Technical update

As other chapters add programming, the website will be updated.

In other news, the APC held a meeting on May 28 and reviewed the webinar of April 23, noting that the topic covering alternative delivery systems in higher education, such as MOOCs, was well received by the 375 attendees at eight local sites.

The APC set annual goals at its meeting that included increased attendance at events, stronger satisfaction scores by attendees, developing more of an administrative infrastructure of documents, and investigating the possibility of reviving those chapters that are no longer functioning. ☀

## **EACUBO is pleased to welcome the following first-time exhibitors at its 2013 Annual Meeting in Baltimore:**

Administrative Resource Options, Inc.

Asset Strategy Consultants

Crowe Horwath LLP

Metz Culinary Management

Nebraska Book Company

Porter Khouw Consulting, Inc.

Royall & Company

Sovereign Bank / Santander Universities

Transamerica Retirement Solutions

As exhibitors, they have helped to offset the cost of the Meeting for our members, and we hope you acknowledge their assistance by visiting them at their exhibit booth at the Annual Meeting and considering their products and services.

# meet the staff

## Gloria Soto Nehemiah



### **How long have you worked for NACUBO?**

I have worked for NACUBO for nearly three years; it will be three years this October.

### **Just what is it that you do at NACUBO, and how do you support EACUBO and its members?**

At NACUBO, I am the Exhibits Manager and work on securing exhibitors for the Annual Meeting and two of NACUBO's smaller conferences: the Endowment and Debt Management Forum and the Student Financial Services conference. My role at NACUBO allows me to nurture EACUBO corporate relationships simultaneously, as many of EACUBO's corporate business partners and exhibitors are also members and exhibitors with NACUBO.

### **Please tell me about your most rewarding or satisfying experience, your proudest moment, since you came on board.**

As the Exhibits Manager, I feel that one of the most rewarding and satisfying experiences is getting to know our corporate members and exhibitors, and assisting them to the best of my ability. I truly enjoy what I do and am proudest when I receive a call or an email from an exhibitor thanking me for assisting them. I know that I am doing my job well, as that is why I am here.

### **Before working here, what was the most interesting job you've ever had?**

One of the most interesting jobs I ever had was working with Nike in Santa Monica, CA, where I'm from originally. I worked in their Promotional Office when product placement was a fairly new thing. I handled baseball promotions for them and saw my

share of Dodger games and painted many a Nike swoosh to match visiting team colors! We had athletes under contract, but we also welcomed musicians, actors/actresses, producers, etc., to come in and pick up whatever they wanted. They would, in turn, use our products in films, TV shows, interviews, photo shoots, etc. Two of my biggest thrills while I was there were meeting Sandy Koufax one day and Sting the next.

### **What are some of your hobbies outside of NACUBO?**

For fun, I enjoy sporting events (basketball being my favorite), and I love music and the arts. I enjoy the time I spend with my daughters, both in college, and with friends and family. I enjoy the beach, since I grew up in Venice, and love getting back there every chance I get. I enjoy cooking and baking while blasting the Beatles in the background!

### **Finally, what do you see in your role supporting EACUBO that delivers the most value to our association?**

The most value I deliver to EACUBO is the fact that I truly enjoy my job and working with their corporate members and exhibitors. I understand what exhibitors are looking for and try to lay out the hall floor, place meals and tables strategically, etc., to ensure the best possible traffic flow for our attendees. Corporate business partners know that they can call on me for anything and if I don't know the answer, I will find out who does. It is always, "My pleasure," and it truly is!



# meet the staff

## Kaysha Johnston



**How long have you worked for NACUBO?**

I've been here exactly seven years and seven months.

**Just what is it is that you do at NACUBO, and how do you support EACUBO and its members?**

My title at NACUBO is Senior Manager, Design and Production. Basically, I am responsible for the look of all NACUBO products, except for *Business Officer* magazine and the Annual Meeting stage sets. I design the marketing materials, membership materials, publications, professional development products, email templates, ads for *Business Officer* magazine, and banner ads for the website.

For EACUBO, I lay out the newsletter and the marketing materials for the Annual Meeting and Annual Workshop, as well as other materials for those meetings.

**Please tell me about your most rewarding or satisfying experience, your proudest moment, since you came on board.**

Recently, NACUBO won an EXCEL award from Association Media and Publishing for our 50th anniversary materials. I was involved in producing most of those materials.

I also derive a lot of satisfaction from trying to find new and fresh ways to represent NACUBO and EACUBO materials.

**Before working here, what was the most interesting job you've ever had?**

In another lifetime, I used to bartend at a pizzeria. I have been told that I make a mean martini!

**What are some of your hobbies outside of NACUBO?**

I love to read novels and watch movies. I also have a five-year-old daughter who keeps me busy and challenges my imagination constantly. In March I ran my first half-marathon, which was quite a feat for me since I started running just a few years ago.

**Finally, what do you see in your role supporting EACUBO that delivers the most value to our association?**

I hope that I have found visually appealing ways to represent all of the great things that EACUBO does. I have also tried to make EACUBO materials more user-friendly. It's always a work in progress, and we (the marketing department) are constantly thinking of new ways to improve things. ☀️