

EACUBO 2021 Workshop Program Detail

Thursday, March 25

 8:30 AM - 9:30 AM

Re-imagining Public Higher Education for the 21st Century?

Daniel Greenstein, Pennsylvania State System of Higher Education

The 14-university, 100,000-student Pennsylvania State System of Higher Education is fundamentally transforming its educational and business models in response to an array of challenges that confront public higher education nationally but are acutely concentrated in the Commonwealth.

Drawing on promising work across US higher education generally, the system has developed and is implementing a five-point transformational playbook designed to ensure the system continues sustainably to offer affordable, quality education and to drive economic development and social mobility in Pennsylvania well into the 21st century.

After briefly describing the challenges being confronted by Pennsylvania's only public higher education system, the talk will introduce the playbook, speak to how it integrates lessons learned elsewhere in the industry, and examine some of the initial lessons that are being learned.

 10:00 AM - 11:15 AM

Concurrent Sessions

Data Analytics: Writing Your Story of Fiscal Resiliency in Times of Disruption

Mr. Loren Prescott, Jr., Wilkes University
Ms. Christine Smith, Baker Tilly US, LLP
Mrs. Jessica Swingle, Wilkes University

As higher education leaders, the ability to assess your institution's fiscal situation and execute an effective plan to ensure long-term resiliency is critical in these challenging times. In this interactive and informative session, we will discuss key approaches and tools to effectively gain broad institutional support of crucial (and often times difficult) decisions and actions. Specifically, learn about how colleges and universities are using data analytics and integrated fiscal models to drive important changes in their business models and refocus institutional strategy based on what the data is telling them.

HEERF II Funding Provisions and What Changed from the CARES Act

Bryan Simkanich, CliftonLarsonAllen LLP
Ms. Yuliya Ostapenko, CliftonLarsonAllen LLP

The recent Coronavirus Response and Relief Supplemental Appropriations Act (CRRSAA) authorized additional funding to institutions of higher education through the Higher Education Emergency Relief Fund (HEERF II). While there are some similarities to the funding provided last year by the CARES Act, the CRRSAA Act brings new requirements and complexities. During this session, we will give an overview of key provisions of the Act and address challenges faced by many institutions in interpreting the legislation.

The Role of the CBO

Mr. Larry Goldstein, CPA, Campus Strategies, LLC

This session examines the typical responsibilities of a college or university chief business officer (CBO). It explores the common operational areas for which the CBO is responsible and highlights the positions with which the CBO interacts on a regular basis, and identifies the types of issues that drive these interactions. Also addressed are the characteristics of individuals who are successful in these roles and the factors contributing to that success. Participants will leave the session understanding the nature of the CBO role along with a sense of whether they are on the right path if the CBO role is something to which they aspire.

 12:00 PM - 1:00 PM

Concurrent Sessions

Cybersecurity in Higher Education

Christian Hamer, Harvard University

In this session, we will describe the current cybersecurity threat landscape with an emphasis on higher education. We will talk about how to categorize the threats and threat actors behind them and how frameworks can help us think about defending against them. We will finish with some of the most important things that Harvard has done, why we did them, and how they helped.

Imbedded Change Management - How to Effectively Navigate the People Side of Change

Anna Borgerding, University of Maryland Baltimore
Ms. Nazanin Fouladi, University of Maryland Baltimore

Presenters will discuss their change management journey, which started with a reorganization strategy to imbed a change management department within Facilities and Operations. The Operational Excellence department assists with targeted change management implementation strategies using a Core Team model. Their Core Team model helps them facilitate scalable and

targeted change management. The session will offer participants an understanding of change management best practices, reinforcement strategies for their changes, and corrective actions to help manage resistance to change.

Reallocating Resources Toward a Post Pandemic College

Mr. Richard Staisloff, rpk Group

Ms. Melissa A. Beardmore, Anne Arundel Community College

Budgeting at higher education institutions is largely based on historical allocations, with little connection to strategy. As a result, many institutions find themselves with unsustainable business models. This session will share how institutions can shift to a return-on-investment framework, allowing them to reallocate toward a new shared future vision and create a business model that is sustainable in the long run. The session will feature recent case study examples of academic portfolio and administrative services restructurings that positioned institutions to emerge strongly from the pandemic.

Friday, March 26

 8:30 AM - 9:30 AM

Making Racial Equity, Diversity and Inclusion Standard Operating Procedure

Ms. Melody S. Bianchetto, University of Virginia
James Bird Guess, The Racial Equity Group
Ms. Patty Marbury, University of Virginia
ToShun Campbell, University of Virginia

In the Fall of 2019, UVA began to implement the Inclusive Excellence (IE) framework to synergize and support diversity, equity, inclusion, and belonging efforts across the institution. As part of this work, the UVA Finance department established a initiated an IE working group to evaluate human resource practices, identify training and development resources, and sponsor opportunities for UVA Finance team members to develop a better understanding of racial equity. However, we wanted to do more to ensure intentional and ongoing change. Accordingly, UVA Finance partnered with the Racial Equity Group to develop a plan for meaningful, measurable, and tangible change.

 10:00 AM - 11:15 AM

Concurrent Sessions

Accounting Update

Ms. Angelica Roiz, Grant Thornton LLP
Mrs. Claire Esten, Grant Thornton LLP

Balancing Risks: Pandemic Contingency Management in Higher Education

Richard Keeling, Keeling & Associates
Dr. Hania Ferrara, Fairleigh Dickinson University
Mr. David R. Proulx, Rhode Island School of Design

Balancing and managing the risks created by the COVID-19 pandemic has challenged the most fundamental priorities of colleges and universities, especially in the larger context of threats to undergraduate enrollment and the common business model of colleges and universities, and has required innovation, adaptation, and resiliency across higher education. The panelists, after reviewing contingency planning and levels of tolerance for variations in academic program delivery, the quality of the student experience, pandemic-associated expenses, and high budget deficits, will engage participants in discussing factors associated with success in institutional risk

and contingency management, describing “fail points” to be avoided, and identifying operational and management policies, practices, or activities put in place during the pandemic that institutions are likely to retain once the current crisis subsides.

Courageous Conversations

Mr. Mark Saine, TIAA

Having the right conversation in the right way sounds easy, but most of us struggle when the message is difficult or when there are conflicting points of view. This workshop investigates four dynamics of conversations that lead to miscommunication and misunderstanding, and the two primary approaches to difficult conversations. We’ll discuss the case for getting better at holding challenging conversations, and participants will explore a challenging conversation that they have had or need to have.

 12:00 PM - 1:00 PM

Concurrent Sessions

Act Now: Using Long-Term, Market-Informed Strategy in the COVID Era

Michael Marshall, Bellarmine University
Mr. Barry Maloney, Worcester State University
Ms. Nanci Tessier, Art & Science Group LLC

Even before the pandemic, higher education was facing a demographic cliff that was certain to have significant impact on enrollment and ultimately on net tuition revenue. Last March, COVID-19 brought that looming crisis right to our front door, presaging a post-coronavirus higher ed landscape no doubt even more challenging than anticipated before the pandemic and shaking the financial foundations of many institutions. While the pandemic has understandably had college and university leaders focused keenly on immediate challenges, mid-crisis is actually the time to be moving on longer-term institutional strategy. The panel will discuss principles underlying moving forward strategically in the midst of a crisis, experiences of institutions that did so in past crises, and thoughts on how chief business officers can help foster institutional strategy today.

Assess the Impact of COVID-19 on Your Campus Facilities

Christopher Buddle, McGill University
Cameron Charlebois, McGill University
Elliot Felix, Brightspot Strategies

How is covid-19 changing learning, research, student life, and work – in the short and long term – and what will the implications be for campus facilities? To answer this question, McGill University worked with brightspot to gather data and facilitate retreats with representatives from learning, research, HR, IT, facilities, and finance. This interactive session will walk participants

through the process while offering them the chance to reflect on, discuss, and apply the lessons to their institutions while gathering valuable insights from their peers in real-time.

Generating New Revenue Streams in Our COVID-19 Reality: Asset Monetization, Service Bundling, and P3 Partnerships

Mr. Jeffrey Turner, LEED AP, Brailsford and Dunlavey
Karen Mitchal, Aramark

As we transition to living in a world changed by the novel coronavirus, higher education will require non-traditional revenue sources to offset expected declines in enrollment, auxiliary services, and athletics. Asset monetization provides such a source by leveraging an institution's physical and energy infrastructure for long-term capital gain. Organizations are interested in leasing and operating these assets while continuing to provide energy to your campuses. Additional financial benefits are derived when bundled with other services, such as facilities management and dining services. A public-private partnership (P3) provides the expertise and resources for efficient, affordable changes that align with both campus needs and student demands, while securing new revenue streams. This session will explain how these P3 partnerships work and share insights for institutions to acquire capital and reduce risk.