A Monumental Opportunity

EACUBO Annual Workshop
March 25–27, 2015
Crystal Gateway Marriott—Washington DC
<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Wednesday, March 25</th>
<th>Thursday, March 26</th>
<th>Friday, March 27</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30 a.m. – 3 p.m.</td>
<td>Registration and Information Desk Open</td>
<td></td>
<td></td>
<td>Registration and Information Desk Open</td>
</tr>
<tr>
<td>7:30 – 8:30 a.m.</td>
<td>Next Generation Chief Business Officer Session Breakfast*</td>
<td></td>
<td></td>
<td>7:30 – 8:30 a.m.</td>
</tr>
<tr>
<td>8:30 a.m. – 5 p.m.</td>
<td>Next Generation Chief Business Officer Session*</td>
<td></td>
<td></td>
<td>8:30 – 9:45 a.m.</td>
</tr>
<tr>
<td>7:30 a.m. – 4:15 p.m.</td>
<td>Registration and Information Desk Open</td>
<td></td>
<td></td>
<td>10 – 11:15 a.m.</td>
</tr>
<tr>
<td>7:30 – 8:45 a.m.</td>
<td>Networking Breakfast</td>
<td></td>
<td></td>
<td>11:15 – 11:45 a.m.</td>
</tr>
<tr>
<td>8:45 – 10 a.m.</td>
<td>General Session I</td>
<td></td>
<td></td>
<td>11:45 a.m. – 1 p.m.</td>
</tr>
<tr>
<td>10 – 10:20 a.m.</td>
<td>Refreshment Break</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10:20 – 11:35 a.m.</td>
<td>Concurrent Sessions I</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11:45 a.m. – 1:15 p.m.</td>
<td>Lunch and EACUBO Update</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1:30 – 2:45 p.m.</td>
<td>Concurrent Sessions II</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2:45 – 3:15 p.m.</td>
<td>Refreshment Break</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3:15 – 4:30 p.m.</td>
<td>Concurrent Sessions III</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4:30 – 6 p.m.</td>
<td>Networking Reception</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* This session requires an additional fee.
# Table of Contents

Concurrent Sessions-at-a-Glance .................................................. In Pullout
Continuing Professional Education Grid ......................................... In Pullout
Welcome Letter. ............................................................................. 2
Program and Services Committee .................................................. 3
Board of Directors .......................................................................... 4
EACUBO 2015 Annual Workshop Sponsors. ...................................... 5
Mobile App Information ................................................................. 6
Continuing Professional Education Information ............................... 7
EACUBO Mentoring Program ............................................................ 8
EACUBO Incubator Session ............................................................. 9
Next Generation Chief Business Officer Session ............................... 10
Track Descriptions .......................................................................... 11
Program ......................................................................................... 12
About Washington, D.C. ................................................................. 20

Program Guide Sponsor:

---

#EACUBOAW
March 25, 2015

Dear Colleagues:

It is my pleasure to welcome you to the EACUBO 2015 Annual Workshop, “A Monumental Opportunity,” in our nation’s capital, Washington, D.C. On behalf of our volunteer Program & Services Committee, we hope you will take advantage of as many sessions as possible. We have scheduled a series of general and breakout sessions designed to enhance your professional life and give you useful tools that you can put into play on your campuses. We organized the sessions in a way that makes it easier for you to plan out specific areas of interest, whether you want to take a deeper dive into certain tracks, or learn something new from each track. We have used the feedback you have provided as the basis for many of the sessions you will attend over the next two days.

We are excited about our two prominent keynote speakers, both experts in their fields. Kristi Hedges is a communications expert and credentialed leadership coach through Georgetown University. She also is certified in emotional intelligence. Hedges will explore the “power of presence,” giving you new insight into unlocking your potential to engage and inspire others. You also will hear from Marty Meehan, chancellor at University of Massachusetts Lowell, on how he came together with his leadership team to produce the UMass Lowell 2020 Strategic Plan. The strategic plan has turned into a verifiable success story, moving the university into high accolades, including recognition in Forbes’s Best Value College ranking in 2013. Both of these speakers bring many years of experience, tools, and techniques, which I am confident you will find useful on your campuses.

Networking is one of the key benefits of belonging to EACUBO, so take advantage of the many networking opportunities by joining us during meals and at the reception to expand your professional network. Don’t leave D.C. without having made a few new professional contacts and catching up with old friends. With more than 18 breakout sessions that appeal to all audiences, you not only will earn valuable educational credits, you also will leave this conference better prepared to take on the challenges facing your institution. Join us as we strive to lead educational institutions in a time of change.

Sincerely,

Joanne Yestramski
Vice Chancellor, Finance & Operations, University of Massachusetts Lowell
Chair, Program & Services Committee
Program & Services Committee

Chair
Joanne Yestramski
Vice Chancellor, Finance & Operations
University of Massachusetts, Lowell

Members
Jare Allocco Allen
Assistant Vice President, Finance/Controller
Loyola University Maryland

Claire Burlingham
Controller
University of Vermont

Brian Douglas
Vice President, Finance & Administration
Wheaton College

Mike Gower
Senior Vice President, Finance & Treasurer
Rutgers, The State University of New Jersey

Robert Huth
Vice President, Business Affairs & CFO
Stetson University

Charles Ingram
Vice President, Administration & Finance
Richard Stockton College of New Jersey

Rich Kelley
Director, Budget & Payroll Services
Salem State University

Ken Long
Vice President, Administration & Finance
East Stroudsburg University of Pennsylvania

Sue Perkins
Vice President, Finance & Administration
Middlesex County College

Christian Recknagel
Vice President, Leadership and Culture
Benchmark Construction Company, Inc.

Jenni Sauer
Vice President, Finance and Administration
Immaculata University

Steve Schafer
Associate Vice President & Controller
Lafayette College

Lynne Schaefer
Vice President, Administration & Finance
University of Maryland Baltimore County

Nicole Trufant
Vice President, Fiscal Affairs
University of New England

Nico Washington
Associate Provost for Financial Management
University of Maryland Baltimore County

Cathy Wood
Vice President, Finance and Treasurer
The Catholic University of America
EACUBO Board of Directors

Chair*
J. Michael Gower*
Senior Vice President, Finance & Treasurer
Rutgers, The State University of New Jersey

Vice Chair*
Lynne Schaefer
Vice President, Finance & Administration
University of Maryland Baltimore County

Treasurer
Maureen Murphy
Vice President, Administration & Finance
Emerson College

Immediate Past Chair*
Randy Gentzler
Vice President, Finance & Treasurer
Loyola University Maryland

Secretary
Sue Perkins
Vice President, Finance & Administration
Middlesex County College

Program and Services Chair*
Joanne Yestramski
Vice Chancellor, Finance & Operations
University of Massachusetts Lowell

At-Large Members
Joseph Baker
Senior Vice President, Finance & Administration
Widener University

Timothy Bowman
Executive Dean, Administration, SEAS
Harvard University

Michael Cooney
Partner
Nixon Peabody LLP

J.J. Wagner Davis
Senior Vice President, Administration & Finance
George Mason University

Brian Douglas
Vice President, Finance & Administration
Wheaton College

Melissa Hopp
Vice President, Administrative Services
The Community College of Baltimore County

Rich Kelley
Database Administrator
Director, Budget & Payroll Services
Salem State University

Kenneth Long
Vice President, Administration & Finance
East Stroudsburg University

Christian Recknagel
Vice President, Leadership & Culture
Benchmark Construction Company, Inc.

Jenni Sauer
Vice President, Finance & Administration
Immaculata University

Basil Stewart
Controller
Massachusetts Institute of Technology

Mitch Wein
Chief Administrative Officer and Vice President for Finance, Treasurer
Haverford College

Appointed Position
Historian
Therese Sampson
Dean, Administration & Business Services
Atlantic Cape Community College

* Executive Committee
EACUBO 2015 Workshop Sponsors

By Level

**Gold**
The PFM Group
Grant Thornton, LLP

**Silver**
ARAMARK Higher Education
Armstrong, Doyle & Carroll, Inc.
Baker Tilly
BDO
KPMG LLP

By Event

**Sponsor**
ARAMARK Higher Education
Armstrong, Doyle & Carroll, Inc.
Baker Tilly
BDO
Brill Neumann Associates
Corvias Campus Living
Grant Thornton, LLP
KPMG LLP
Oracle
PNC Capital Markets, LLC
The PFM Group
Sibson Consulting
Teibel, Inc.

**Event**
Concurrent Session
Friday Morning Refreshment Break
Program Guide
Charging Station; Room Drop
Networking Reception
Meeting Tote
Thursday Afternoon Refreshment Break
Lanyards
Internet Café
Networking Reception Bar
Thursday Lunch
Networking Reception
Concurrent Session
Networking Reception Bar
Networking Reception Bar

Silver (continued)
PNC Capital Markets, LLC
Sibson Consulting

Bronze
Barclays Capital
Brill Neumann Associates
Corvias Campus Living
Oracle
Teibel, Inc.
Download the Mobile App

For iPhone (plus iPad & iPod Touch) and Android devices:
Visit your App Store or Google Play on your device and search for “EACUBO”

For all other device types (including BlackBerry, Windows, and all other web browser-enabled devices):
While on your smartphone, point your mobile browser to http://l.core-apps.com/eacubo15aw or scan the QR code!
From there you will be directed to download the proper version of the app for your specific device.
The learning objectives for attendees at this professional development meeting are the introduction or enhancement of critical, technical, and management skills that are targeted to higher education business administrative professionals.

At the conclusion of this workshop, participants will be able to:

- Demonstrate an understanding of current issues in finance, efficiencies, talent management, and academic transformation.
- Illustrate how institutions are managing for success in these changing times.
- Demonstrate knowledge of technical issues and awareness of emerging trends.
- Share insights gained from colleagues from institutions up and down the Eastern Seaboard with peers at their campus.
- Demonstrate strengthened leadership abilities in campus collaborations and communications.

The 2015 annual workshop has been certified to award participants up to 10.5 CPEs (17 for those participating in the Next Generation CBO workshop) in the form of group live presentation. EACUBO strives to provide the best quality programming to all its members and the higher education industry. Should there be a concern with the quality of programming or level of service, please contact Jare Allocco Allen, EACUBO CPE contact, email jalloccoallen@loyola.edu.

#EACUBOAW
EACUBO Mentoring Program

The EACUBO Mentoring Program is by invitation only. If you would like to get involved with the mentoring program, please contact Mary Jo Maydew at mjmaydew@gmail.com or Jenni Sauer at jsaur@immaculata.edu.

2014–2015 Mentoring Partnership Closing Session (Cohort 3)
Thursday, March 26, 5–8 p.m.
Room: Fairfax (second floor)

The Mentoring Partnership closing session is the third and final formal face-to-face session, concluding the year-long mentoring program for the 2014–2015 cohort. There are two segments to the session:

1. Mentor Panel and Group Discussion: Mentors will consider various professional-development topics, followed by group discussion.
2. Program Assessment: Over cocktails and dinner, the group will reflect on their experiences during the year and provide feedback on how future programs can be improved.

2015–2016 Mentoring Partnership Opening Session (Cohort 4)
Friday, March 27, 2–5 p.m.
Room: McLean (second floor)

The Mentoring Partnership opening session is the first of three formal, face-to-face sessions for the 2015–2016 cohort. The mentoring program has four segments:

1. A review of the history of the mentoring program and a description of the components of the current year’s activities.
2. A group discussion of leadership and reflection on successful leaders.
3. An overview and discussion of the various aspects of mentoring and the development of a shared understanding in the context of the EACUBO program.
EACUBO believes that education and problem solving should occur simultaneously. The organization is committed to creating environments where members can discuss, brainstorm, and “incubate” ideas. Our first pilot of this incubator concept will focus on discussing the elements of a sustainable economic model for higher education. Bridging the end of the Thursday networking session and dinner block, this small group session spanning two and half hours over pizza and cocktails will provide participants a relaxed environment to discuss the structural and cultural changes required to move our institutions towards financial sustainability. Moderated by NACUBO Senior Fellow, Bob Shea, this discussion will contribute to NACUBO’s Economic Models Project which will develop a book-length guide on sustainability in higher education.

The EACUBO Incubator Session is by invitation only. If you would like to get involved with the incubator initiative in the future, please contact Rich Kelley at rkelley@salemstate.edu.
Wednesday, March 25

7:30–8:30 a.m.  Next Generation Chief Business Officer Session  Room: Grand Ballroom Foyer (1st Floor)
Registration and Breakfast

8:30 a.m.–5 p.m.  Next Generation Chief Business Officer Session  Room: Grand Salon D & E
Larry Goldstein, Campus Strategies

This session for next generation chief business officers will review the state of leadership in higher education, including the CFO’s role, the future timeline for those in higher education, and career mapping. This workshop is tailored for non-CFO senior staff in the finance/business division of colleges and universities.

Facilitated by Larry Goldstein, president of Campus Strategies, this full-day session will provide attendees with a better understanding of the many complex hats a higher education CFO must wear each day. Key attendee takeaways will include:

• Developing strategic-thinking skills, including getting beyond the day-to-day operational challenges encountered in a higher education institutional setting

• Finding comfort, and appropriately dealing, with the level of ambiguity that exists in today’s complex organizations

• Exploring the range of issues confronting CFOs in academic settings

• Understanding how to deal with complex ethical issues with multifaceted and complementary solutions

• Examining the leadership-operating style and its implications for the strategic challenges confronting institutions
Track Descriptions

For ease of planning your day and organizing the sessions you want to attend, EACUBO has changed this year’s workshop format by arranging the concurrent sessions under five tracks. This new format will allow attendees to plan out specific areas of interest, whether they want to delve in-depth into one track or learn something new from each. The track topics are designed to provide a more specific outline of the sessions and to help attendees lay out their day’s agenda.

Below are the five new tracks with an overview of each:

**Efficiency:** Attendees will discuss some of the most significant challenges and opportunities facing higher education. Discussion leaders will examine topics such as shared-service initiatives, lowering costs and increasing student outcomes, and keeping institutions competitive.  
*Room: Salon I & II*

**Financial:** Attendees will learn and share ideas regarding key financial issues facing today’s business officers. Topics will include financial reporting and analysis, budgeting and multiyear financial models, best practices, and compliance issues.  
*Room: Salon V*

**Leadership Development:** Attendees will explore the principles and skills associated with leading difficult conversations, collaborating with senior leaders and the president’s cabinet, and conveying financial information to nonfinancial personnel.  
*Room: Salon FGH*

**Talent Management:** Attendees will hear from discussion leaders and colleagues about overseeing career and succession planning, building an effective team, handling the organization’s public persona, and managing career transitions.  
*Room: Salon VI*

**Academic Transformation:** Attendees will review innovative approaches and the tools needed to deal with the challenges facing higher education leaders. Topics will include strategic planning and student retention.  
*Room: Salon FGH*
Thursday, March 26th

7:30–4:15 p.m.  Registration  
Room: Arlington Ballroom Foyer

7:30–8:45 a.m.  Networking Breakfast  
Room: Arlington Ballroom Foyer

8:45–10 a.m.  General Session: The Power of Presence  
Kristi Hedges, The Hedges Company
Participants will gain actionable strategies for developing their personal leadership presence and enhancing communications skills for better relationships with employees, supervisors, customers, boards, their industry—literally every audience they touch. Through interactive exercises, both individually and in small groups, each participant will leave with feedback on their personal leadership communications strengths and challenges and have concrete tools for improvement.

10–10:20 a.m.  Refreshment Break  
Room: Arlington Ballroom Foyer

10:20–11:35 a.m.  Better Student Outcomes, Lower Cost—The Saint Michael’s Case Study  
William O. Anderson, Saint Michael’s College
Mary Jane Russell, Saint Michael’s College
The Accelerated Summer College at one institution blends the best of new technology-based content with a traditional high-touch, student-faculty relationship model. While ASC students are in residence and meet face-to-face with faculty mentors, they use third-party online content for course delivery. This session will explore how using third-party adaptive learning and assessment tools in the content-delivery platforms improves faculty productivity and student outcomes, and offers the potential for three-year degrees.

11:45 a.m.–1:15 p.m.  Luncheon and EACUBO Update  
Room: Salon III & IV
Sponsored By: PNC Capital Markets, LLC

Efficiency  
Room: Salon I & II

Financial  
Room: Salon V

Your Debt Portfolio: What If You Don’t Have a “AAA” Rating?  
Howard C. Buxbaum, Bloomfield College
Anthony Cipolla, Dominican College of Blauvelt
Lauri Strimkovsky, Chestnut Hill College
Joseph Cord Bosch, Janney Montgomery Scott, LLC
Colleges today are faced with a diverse landscape of financing options, including the traditional bond markets and bank private placements as well as many challenges, including letter of credit expiration, “out of the money” interest rate swaps and an influx of new lenders into the market. Choosing the right team and telling a coherent story are critical to success in the current environment.
Continuing the Conversation: 
Power of Presence
Kristi Hedges, The Hedges Company

Breaking through any participant’s preconceptions about being an extrovert or introvert, a born communicator or a behind-the-scenes executive, Hedges shows that leadership communications is 100% learned and achievable. Join Kristi Hedges for an extended session and open forum to dive deeper into this topic.

Sponsored By: ARAMARK Higher Education

Managing Your Organization’s Public Face
Nicole Trufant, University of New England
Joe Giso, CBIZ & Mayer Hoffman McCann P.C.

Colleges and universities have unique exposures to public information risks beyond those associated with Form 990. Your organization’s website, as well as federal websites, state and local jurisdictions, and ratings agencies can reveal conflicting data, threats, or confidential information. In this session, presenters will discuss ways to ensure your organization has complete, accurate, and risk-mitigated data in the public domain.
<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Location</th>
<th>Sponsor</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:30–2:45 p.m.</td>
<td><strong>Efficiency</strong>&lt;br&gt;University of Maryland’s Effectiveness and Efficiency Initiative: Ways to Improve Productivity and Fund Campus Priorities&lt;br&gt;Ben Passmore, <em>University System of Maryland</em>&lt;br&gt;Charlene Hughins Uhl, <em>University of Maryland Baltimore County</em></td>
<td>Room: Salon I &amp; II</td>
<td>Sponsored By: Sibson Consulting</td>
</tr>
<tr>
<td></td>
<td>This panel will share the lessons learned from a decade of experience in implementing the University of Maryland’s Effectiveness and Efficiency Initiative (E&amp;E) and the new direction this initiative is taking in response to the current political and economic environment. Panelists will share challenges and successes in securing buy-in of campus leadership, implementing this initiative at the ground level, and where to go when the “low-hanging fruit” is gone. Participants will be invited to share their experiences with cost savings and avoiding costs, identifying new revenues, and strategic reallocation of campus revenues.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2:45–3:15 p.m.</td>
<td><strong>Refreshment Break</strong></td>
<td>Room: Arlington Ballroom Foyer</td>
<td>Sponsored By: Corvias Campus Living</td>
</tr>
<tr>
<td>3:15–4:30 p.m.</td>
<td><strong>Efficiency</strong>&lt;br&gt;Structuring Your Division for Success&lt;br&gt;Lauren Turner, <em>University of Massachusetts Lowell</em>&lt;br&gt;Joanne Yestramski, <em>University of Massachusetts Lowell</em>&lt;br&gt;Gail Gregory, <em>Teibel, Inc.</em></td>
<td>Room: Salon I &amp; II</td>
<td></td>
</tr>
<tr>
<td></td>
<td>One of the biggest organizational challenges facing the finance and administration division is creating a structure where the right people are focused on the right priorities. To address this challenge, administrators need to identify the work that matters, understand what people are really spending their time doing, and re-organize the department from a functional perspective. This session will review how leaders at one university used a process to think strategically about the organizational structure, functional roles, and work focus.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4:30–6 p.m.</td>
<td><strong>Networking Reception</strong></td>
<td>Room: Salon III &amp; IV</td>
<td>Event Sponsored By: BDO and Bar Sponsored By: Oracle, Sibson Consulting, and</td>
</tr>
</tbody>
</table>
### Leadership Development  Room: Salon FGH

**Collaborating With Your Cabinet**  
Randall Gentzler, Loyola University Maryland  
Kenneth Long, East Stroudsburg University of Pennsylvania  
Howard Teibel, Teibel, Inc.

Is your cabinet able to demonstrate to your board a common understanding of the strategic issues your institution faces? Are you able to redirect disagreement and conflict toward a focus on shared goals and mission? In this session, a panel comprised of experienced business officers and an organizational development expert will discuss how to create this partnership on your campus.

### Talent Management  Room: Salon VI

**Building My Brand, Building My Career**  
Mark Saine, TIAA-CREF

As institutions adapt to the changes in higher education, new prospects arise to grow professionally and transition to new opportunities. This session will explore how to create a clear career direction, identify your most marketable skills, and take steps that can lead you to the future you want.

### Leadership Development  Room: Salon FGH

**Conveying Financial Information to Nonfinancial Personnel**  
Nicole Trufant, University of New England  
Philip Malinoski, Higher Ed Strategies

Presenting complex financial data and information designed to inform decision making across broad constituents in higher education can be challenging. The use of information graphics (infographics) in lieu of traditional presentations, in which information and data is presented in bullet and narrative format, is gaining momentum. This session will introduce ways to integrate infographics when presenting data and information. Panel experts will present information in compact and creative ways that will demonstrate how to quickly convey knowledge and generate a more efficient decision-making process. Illustrations and infographic tools also will be examined.

### Talent Management  Room: Salon VI

**Succession Planning: Strategies and Challenges**  
Lynne Schaefer, University of Maryland Baltimore County  
Mitch Wein, Haverford College  
Cathy Wood, The Catholic University of America

One of the great assets a higher education institution has is its people. Many colleges and universities are having serious conversations about succession planning, both as a way to mitigate risk of key personnel loss, and to develop future leaders as a retention strategy. This panel will facilitate a conversation with session participants and share their own experiences on how productive succession planning exercises can occur across many layers in the organization, can anticipate obstacles, and can engage multiple constituencies to achieve goals that may, at first, look like competing objectives. Together we will redefine succession planning in its many forms, consider the challenges of culture, environment, resources, administrative bandwidth and other factors, and share what is working and what is not with each other.
Friday, March 27th

7:30 a.m.–1 p.m.  Registration  Room: Arlington Ballroom Foyer
7:30–8:30 a.m.  Networking Breakfast  Room: Arlington Ballroom Foyer
8:30–9:45 a.m.  General Session: Public Enterprise for Entrepreneurship and Innovation
                Marty Meehan, University of Massachusetts Lowell

This general session will explain the strategies toward success for a major research public university that strives for excellence in teaching, research, and community engagement. The university is committed to benchmarking progress toward its goals and has created a “report card” to track and evaluate indicators vital to success.

10–11:15 a.m.  Efficiency  Room: Salon I & II

Endowment Management — Out Source, In Source, Consult: Which Solution Is Right for You?
Bob Huth, Stetson University
David Proulx, Franklin & Marshall College
David Surgala, Bucknell University
John Griffith, Hirtle, Callaghan & Co.

As the complexity of investment products continue to expand and market volatility remains at historic levels, college and university leaders must determine how they should oversee the management of their institution’s endowment. In this session, representatives from three institutions will share their experiences in deciding how to manage their endowment and finding the right solution for their institution. Each selected a different solution: outsourcing, building an internal office, and hiring a consultant to work with the board.
### Further Down the Road to RCM
**Kimberley Cole, Rutgers, The State University of New Jersey**
**J. Michael Gower, Rutgers, The State University of New Jersey**

As a follow up to a session presented at the fall EACUBO annual meeting, this session is a continuation of one university’s adoption of Responsibility Center Management. The university is a complex institution with multiple campuses, further complicated by the recent merger of another university’s medical school. Focusing on the implementation process, the session will feature dual viewpoints: central administration and the academic unit. Attendees will view new material and issues not previously addressed.

### Positively Impacting Student Retention:
**One Institution’s Journey**
**Cathy Wood, The Catholic University of America**
**Monica Modi Dalwadi, Baker Tilly**

Student retention is a complex issue that begins with student recruitment and extends through matriculation; it includes both the student’s academic and nonacademic experiences. While many factors impact student retention at a university, it can be difficult to pinpoint one specific factor that causes changes in student retention. Yet, minor fluctuations in retention rates can significantly impact tuition revenue and an institution's bottom line. This session will present opportunities and approaches to increasing student retention rates, including determining cost savings and investments that have the greatest impact, using predictive modeling and targeted outreach, and evaluating the effect of process improvements.
11:15–11:45 a.m. Refreshment and Check-out Break

Efficiency Room: Salon I & II

11:45 a.m.–1 p.m. Strategic Business Analysis: Keeping Your Institution Competitive Through Strategic Improvement Initiatives
Cynthia Hale, University of Maryland
Mark Oster, Grant Thornton LLP
Matt Unterman, Grant Thornton, LLP

Having already undertaken necessary short-term incremental actions in response to recent economic difficulties, higher education institutions are now shifting their focus to more fundamental and strategic changes in their operations, programs, and services to find new and significant increases in revenues, decreases in expenses, and reallocation of resources. In addition to developing plans to enhance financial stability, management needs to link these financially-oriented plans to institutional strategic plans, as well as engage in substantial change management initiatives to obtain “buy in” to these plans and implement change across their institutions. This presentation will explore strategic improvement initiatives that higher education institutions are employing to enhance their financial standing, as well as summarize the corresponding change management efforts to support administrations’ performance improvement goals.

1 p.m. Program Adjourns

We want to hear from you!
Your feedback is very important to us and is used when planning future programs. Please take a moment to complete the brief evaluation form which will be emailed to you at the conclusion of the program.
### 11:15–11:45 a.m. Refreshment and Check-out Break

**Room:** Arlington Ballroom Foyer

**Event Sponsored By:** ARAMARK Higher Education

### 11:45 a.m.–1 p.m. Strategic Business Analysis: Keeping Your Institution Competitive Through Strategic Improvement Initiatives

Cynthia Hale, University of Maryland
Mark Oster, Grant Thornton LLP
Matt Unterman, Grant Thornton, LLP

Having already undertaken necessary short-term incremental actions in response to recent economic difficulties, higher education institutions are now shifting their focus to more fundamental and strategic changes in their operations, programs, and services to find new and significant increases in revenues, decreases in expenses, and reallocation of resources. In addition to developing plans to enhance financial stability, management needs to link these financially-oriented plans to institutional strategic plans, as well as engage in substantial change management initiatives to obtain “buy-in” to these plans and implement change across their institutions. This presentation will explore strategic improvement initiatives that higher education institutions are employing to enhance their financial standing, as well as summarize the corresponding change management efforts to support administrations’ performance improvement goals.

### Planning and Budgeting

Jessica Davenport, Columbia College Chicago
William Frederking, Columbia College Chicago
Sayma Riaz, Columbia College Chicago

As many institutions are faced with multiyear budget reductions, the leadership of one college determined that it was imperative to create a sustainable financial model and assess the driver of expenditures, which was the curriculum. To ensure resources effectively and efficiently supported the mission of the college, the team created a strategic resource-assessment tool utilizing zero-based budgeting to align budget and curriculum inclusive of faculty, staff, and administrators. This session will examine how the development and implementation of this model emphasized transparent decision making, incentive-based allocation, and prudent stewardship of the college’s resources.

### Strategy and Cultural Transformation in Higher Education

Kurt Steinberg, Massachusetts College of Art and Design
Barry Dornfeld, Center for Applied Research

This interactive workshop will reframe traditional “strategic planning” as organizational change—designed to put strategy into action quickly, build coalescence around institutional goals across multiple stakeholder groups, and create authentic cultural change through strategic work. The session will describe innovative approaches and tools applicable to current strategic challenges for higher educational leaders, using a case study in which the presenters worked together to develop successful strategies employing these approaches.
About Washington, D.C.

Washington, D.C. was founded in 1791 and named in honor of the first U.S. president, George Washington. As the nation’s capital, Washington, D.C., also known as the District, is home to the three branches of the federal government: Legislative, Executive, and Judicial. The city is renowned for its many national monuments and museums.

Washington, D.C., is a melting pot of cultures, with more than 170 foreign embassies. It also serves as the headquarters for numerous international organizations, trade unions, and nonprofits.
Leading the Way in Higher Education Finance

Public Financial Management, Inc.
Financial, Capital and Strategic Planning
Debt, Credit and Risk Management

Brett Matteo
Managing Director
matteob@pfm.com

Kathy Clupper
Managing Director
clupperk@pfm.com

Philadelphia
215.567.6100

June Matte
Managing Director
mattej@pfm.com

 Jeremy Bass
Managing Director
bass@pfm.com

Boston
617.330.6914

PFM Asset Management LLC
Investment Management and Consulting
Arbitrage and Rebate Compliance

Barbara Fava
Managing Director
favab@pfm.com

Katia Frock
Director
frockk@pfm.com

Harrisburg
717.232.2723

The PFM Group
Financial & Investment Advisors
www.pfm.com

June Matte
Managing Director
mattej@pfm.com

Jeremy Bass
Managing Director
bass@pfm.com

Boston
617.330.6914

Barbara Fava
Managing Director
favab@pfm.com

Katia Frock
Director
frockk@pfm.com

Harrisburg
717.232.2723

Public Financial Management, Inc. is a registered municipal advisor with the SEC and the MSRB under the Dodd-Frank Act of 2010. PFM Asset Management LLC is registered with the SEC under the Investment Advisers Act of 1940. A copy of our Form ADV, Parts 2A & B is available upon request.

for ideas that prepare you for the future of education.

With innovative and actionable ideas that draw on our experience with higher education, PNC can help you optimize your institution's performance in today's dynamic educational environment. By offering a deeper understanding of the issues you face, PNC can help you achieve your goals — both short- and long-term — every day.

For more information about our services, please contact Nicholas Tripician at 215-585-7416 or nicholas.tripician@pnc.com.

PNC and “for the achiever in you” are registered marks of The PNC Financial Services Group, Inc. (“PNC”). ©2015 The PNC Financial Services Group, Inc. all rights reserved. PNC Bank, National Association. Member FDIC.
Colleges and universities face affordability pressures, ever-increasing regulatory requirements, and complex challenges in areas such as data security, student safety, and governance. Effective risk management and proactive compliance efforts are now vital.

Baker Tilly's industry specialists have helped more than 250 higher education institutions to gain assurance, optimize resources, manage risk, and ensure compliance.

Connect with us: bakertilly.com/higher-education
Colleges and universities face affordability pressures, ever-increasing regulatory requirements, and complex challenges in areas such as data security, student safety, and governance. Effective risk management and proactive compliance efforts are now vital.

Baker Tilly’s industry specialists have helped more than 250 higher education institutions to gain assurance, optimize resources, manage risk, and ensure compliance.

Connect with us: bakertilly.com/higher-education

© 2015 Baker Tilly Virchow, LLP
Baker Tilly refers to Baker Tilly Virchow, LLP, an independently owned and managed member of Baker Tilly International.

At Grant Thornton, our higher education professionals work extensively with institutions just like yours. That total focus gives them deep experience to help their clients grow in their ability to succeed in their missions. Visit us at grantthornton.com/nfp

At Grant Thornton, our higher education professionals work extensively with institutions just like yours. That total focus gives them deep experience to help their clients grow in their ability to succeed in their missions. Visit us at grantthornton.com/nfp

Reason says:
hire a jack of all trades.

Instinct says:
choose a master of one.

Grant Thornton
An instinct for growth™

“Grant Thornton” refers to Grant Thornton LLP, the U.S. member firm of Grant Thornton International Ltd (GTIL). GTIL and the member firms are not a worldwide partnership. Services are delivered by the member firms. GTIL and its member firms are not agents of, and do not obligate, one another and are not liable for one another’s acts or omissions. Please see grantthornton.com for further details.
A Declaration of Collaboration