EACUBO 2016 Workshop

A Rich History — A Bright Future

March 9–11, Boston Park Plaza
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<th><strong>Wednesday, March 9</strong></th>
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<th><strong>Thursday, March 10</strong></th>
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*This session requires an additional registration fee*
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March 10, 2016

Dear Colleagues:

It is my pleasure to welcome you to the EACUBO 2016 Workshop “A Rich History – A Bright Future” in Boston, MA. On behalf of our volunteer Program & Services Committee, we hope that 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 you can put into play on your campuses. We organized them in a way so that you can take a deeper dive into specific tracks allowing attendees to plan out specific areas that they would like to focus on – or learn a little from each track. We have used the feedback you have provided us over the past years as the basis for many of the sessions you will attend over the next two days.

We are excited to have two general sessions focused on leadership delivered by prominent keynote speakers who are experts in their fields. Gloria Larson, president of Bentley University and Howard Teibel, president, Teibel Inc., will engage the audience in an important dialogue on how to address the challenges facing higher education by building a shared vision for success with your leadership team. You will also hear from Janet Edmunson of JME Insights who will explore exciting research as it applies to high performing workplaces and individual employee effectiveness. Janet uses science, personal stories and practical tools from her FEEDS Positivity Model to establish an awareness and practice of these principles and skills. All 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 please take advantage of the many networking opportunities by joining us during meals and at the reception to expand your professional network. Don’t leave Boston without having made a few new professional contacts and catching up with old friends. With over 20 sessions that appeal to all audiences, you will not only earn valuable educational credits, but you will also leave this conference better prepared to take on the challenges facing your institution.

Sincerely,

Nicole Trufant
Vice President Fiscal Affairs/CFO
University of New England
Chair, Program & Services Committee
Program & Services Committee

CHAIR
Nicole Trufant
Vice President, Fiscal Affairs
University of New England

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Associate Vice President for Finance
Loyola University Maryland

Romayne Botti
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Basil Stewart
Senior Vice President, Finance &
Chief Financial Officer, Fiscal Affairs
Merrimack College

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

*Executive Committee
As a professional association, EACUBO’s mission is to prepare and support financial and administrative leaders as pivotal strategic partners who enable their academic institutions to thrive. We envision a future where our members are known for innovative, forward thinking that positions them as vital leaders on their campuses.

This year, EACUBO board members and scores of committee volunteers continue to design and implement that future vision by focusing on three key areas:

- Developing strategic leaders.
- Creating a personalized member experience.
- Designing environments to generate impactful solutions.

One way we bring these focus areas to life is through the EACUBO Workshop, one of our annual signature events. As colleagues, we value your time and input. We look forward to participating in sessions with you and, together, getting the most out of what the EACUBO 2016 Workshop has to offer:

- Hands-on technical and strategic information that addresses our campus’ needs and supports our professional development.
- Interactive sessions where thought leaders and participants share best practices and develop creative solutions together.
- Opportunities for valuable and fun networking sessions with colleagues.
- Strategic leadership development offerings for colleagues at all levels of our institutions.

Active involvement brings rewards—professional, personal, and for our EACUBO community. Please consider the following:

- Encourage your campus colleagues to participate in EACUBO activities. Our annual meeting and workshop provide a supportive community that can enhance their careers.
- Let EACUBO know what you think. Give us your feedback on our progress to date and ways we can enhance your personal experiences with EACUBO.
- Volunteer to serve the EACUBO membership. Your ideas and work on our planning committees and session proposals can help shape our association’s future.
- Stay connected to EACUBO by joining us on LinkedIn and following EACUBO on Twitter.

The EACUBO Workshop provides a setting where we can analyze today’s issues, tackle challenges, and work together to hone our skills. No matter where we are on our career paths, as EACUBO members we can and will transform the performance of higher education together.
# EACUBO 2016 Workshop Sponsors

## By Level

**GOLD**

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<td>Grant Thornton, LLP</td>
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## By Item

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<td>Grant Thornton, LLP</td>
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<td>Hilltop Securities</td>
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<td>J.P. Morgan</td>
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<td>Teibel, Inc.</td>
<td>Networking Reception Bar</td>
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<td>The PFM Group</td>
<td>Networking Reception</td>
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Download the 2016 EACUBO Workshop Mobile App!

With the 2016 Workshop mobile app, you can:

- Stay organized with up-to-the-minute Speaker and Event information
- Receive important real-time communications from EACUBO
- Build a personalized schedule
- Download event handouts and presentations and take notes on them
- Rate the sessions you attend
- Check the locations of sessions under the maps icon
- Stay in-the-know and join in on social media
- Find attendees and connect with your colleagues through Friends
- And much, much more!

Downloading the App is Easy!

1. **Search:** The Apple app store or Google Play store for “EACUBO” and download.

   Once you have downloaded and opened the app, choose the EACUBO 2016 Workshop and tap “Download.”

   *If you already have the EACUBO mobile app from previous years, simply go to settings and tap “Exit to Show List.” Choose the EACUBO 2016 Workshop and tap “Download.”*

2. **Scan:**

3. **Browse:** For all other device types (including Windows, and all other web browser-enabled devices):

   While on your smartphone, point your mobile browser to l.core-apps.com/eacubo16w to be directed to the proper download version for your phone.

   Should you have any questions, please contact support@core-apps.com
Wireless Internet Access Instructions
To access wireless Internet:

1. Turn on your device’s Wi-Fi and connect to the “MeetingBostonParkPlaza” wireless network.

2. Once connected, launch your Internet browser of choice. You should be automatically redirected to Boston Park Plaza’s login page. If you are not, please refresh your current page or type in a trusted web page such as www.google.com. You should now see the hotel’s login page.

3. Enter your access code: EACUBO.

4. Lastly, agree to the terms and conditions and log in. Enjoy!

For assistance during regular business hours, please dial ext. 2228 from any hotel phone. For after-hours assistance, please dial ext. 4400.

Charging Station
Keep your mobile devices charged so you can continue to enjoy the mobile app and tweet about your workshop experience! Visit the charging station located outside the Grand Ballroom.

Sponsor: KPMG

Internet Café
Need to check your e-mail, reference a source, or print a document? Please visit our Internet Café located in the Mezzanine Foyer.

Sponsor: aramark
Participants submitting requests for CPE credits must provide an adequate record of participation in accordance with the standards issued jointly by NASBA and AICPA. In order to meet this standard, EACUBO will require participants applying for CPE credits to scan the barcode on their badge when entering each session. Each person’s barcode is specific to their registration record so please be sure to have your badge with you for each session. Scanning in is the responsibility of each participant and must be completed within ten minutes of the beginning of each session. After this professional development meeting, CPE certificates will be available online within two-to-four weeks to those attendees who scanned into sessions. You will only receive credit for the sessions you scan into.

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 meeting, participants will be able to:

- Evaluate current issues in financial reporting, budgeting, accounting, financing, and regulatory compliance.
- Illustrate how institutions are managing for success in these changing times.
- 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 2016 Workshop has been certified to award participants up to 10.5 CPEs in the form of group live presentation. An additional 7 CPEs can be earned by attending the Next Generation Chief Business Officer pre-conference. Participation in the mentoring program offers an additional 3 CPEs. 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 Romayne Botti, EACUBO CPE contact, email rbotti@cit.cmu.edu.
The EACUBO Mentoring Program

The EACUBO Mentoring Program is by INVITATION ONLY. If you wish to get involved, please contact Jenni Sauer at jsauer@immaculata.edu.

Mentoring Partnership Opening Session (Cohort 5) Room: Boylston
Wednesday, March 9, 1–4:30 p.m.

This is the first of three formal, face-to-face sessions for the 2016–17 cohort. The program has three segments:

1. Introduction to the mentoring program and a description of the current year’s activities.
2. A facilitated session for mentoring and leadership, with group participation.
3. Discussion of a mentoring partnership agreement, including developing a shared understanding of the expectations for the year.

Learning Objectives:

→ Introduce participants to the mentoring program and prepare them to work in mentor/mentee pairs during the program’s coming year.

→ Increase understanding of leadership, the role of mentoring in professional development, and the ways in which the mentoring program supports the participants’ professional development.

Mentoring Partnership Closing Session (Cohort 4) Room: Boylston
Thursday, March 10, 5–8 p.m.

This is the third formal, face-to-face session and concludes the yearlong mentoring program for the 2015–16 cohort. There are two segments to the session:

1. **Group discussion: Mentor Panel.** Mentors will consider various professional development topics followed by group discussion.

2. **Program assessment.** Over cocktails and dinner, participants will reflect on their experiences during the year and provide feedback on how future programs can be improved.

Learning Objectives:

→ Increase understanding of the various approaches to professional development.

→ Consider the mentor/mentee experiences during the year and how they could be strengthened for future cohorts.

→ Provide networking opportunities for mentors and mentees.
“Incubate” Ideas: Brutal Facts and Vision

Thursday, March 10, 5:30–8 p.m.
Room: Beacon Hill (Fourth floor)

Attendance is limited to those who RSVP’d in advance of the workshop. If you did not RSVP for this session, but wish to attend, please proceed to the EACUBO registration desk to see if space is available.

What is our role as business officers to raise issues, educate our colleagues, and persuade campus leaders, board members, faculty, and staff, to confront and resolve difficult issues, such as enrollment demographics and competition, tuition discounting, deferred maintenance backlogs, and administrative and academic efficiencies? At this unique, interactive small group session of higher education thought leaders and fellow business officers, you will have an opportunity to consider and share your thoughts on the challenges of and best practices for facilitating “brutal facts and vision” conversations on your campus. This session will be structured to facilitate discussion about issues of engagement, telling the story, different practices for different audiences, and other aspects that arise out of the conversation.
The EACUBO 2016 Workshop offers 19 concurrent sessions organized within the following four programmatic tracks—allowing you to focus on a particular area of interest or attend a variety of sessions from multiple tracks.

**Efficiencies/Effectiveness:** Attendees of these sessions will tackle some of the most significant challenges and opportunities facing higher education. Discussion leaders will lead sessions on shared service initiatives, cash management, lowering costs, and increasing student satisfaction.

*Room: Statler*

**Financial Sustainability:** Attendees of these sessions will discuss innovative approaches and tools available to deal with current fiscal challenges facing higher education leaders. Discussion leaders will explore enterprise risk management, collaborative development of cost savings strategies, alignment of strategic goals with fiscal resources, and strategic alliances and public-private partnership opportunities.

*Room: Georgian*

**Leadership and Talent Management:** EACUBO defines leadership more as a mindset rather than a role or title. These sessions are intended to increase attendees’ capacity to foster strategic thinking, create opportunities and generate solutions. Attendees will learn from leaders and colleagues about building teams, leading change, talent management and career planning.

*Room: Arlington*

**Technical Fundamentals:** Attendees of these sessions will learn and share ideas about practical issues facing today’s business officer. Topics include analyzing current accounting and tax developments, managing cyber risk on campus, and deciphering the complex realm of financial reporting and best practices.

*Room: Berkeley/Clarendon*
7:30–8:30 a.m.  Next Generation Chief Business Officer Session
Registration and Breakfast
Room: Georgian Foyer

8:30 a.m.–5 p.m.  Next Generation Chief Business Officer Session
Room: Arlington

Larry Goldstein, Campus Strategies, LLC
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 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 the following:

→ Developing strategic-thinking skills, including getting beyond the day-to-day operational challenges encountered in a higher education institution 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.

2–5 p.m.  Early Registration for Workshop Attendees
Room: Georgian Foyer
Thursday, March 10

7:30 a.m. Registration
Room: Georgian Foyer

7:30–8:30 a.m. Networking Breakfast
Sponsor: pwc
Room: Grand Ballroom B

8:30–9:45 a.m. Building and Supporting Your Senior Leadership Team
Gloria Larson, Bentley University
Howard Teibel, Teibel Inc.
Room: Grand Ballroom A

To address the challenges facing higher education, your leadership team must have a shared vision for success. Getting there necessitates an honest and open relationship with and among the cabinet and president. Leadership is about knowing when to bring a collaborative mindset to the team and when to be directive. Most importantly, any exceptional leadership team needs to live by a set of shared values, working principles, and shared goals. In this interactive discussion, Larson and Teibel will engage the audience in these important topics.

Sponsor: CohnReznick
Accounting • Tax • Advisory

9:45–10:15 a.m. Refreshment Break
Room: Grand Ballroom B

Sponsor: Baker Tilly
Accountants and Advisors
Thursday, March 10

10:15–11:30 a.m.

**CONCURRENT SESSIONS**

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<tr>
<td><strong>Implementation and Training for Shared Services:</strong></td>
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<td>A Roundtable Discussion</td>
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<tr>
<td>Kathleen Bienkowski, Emory University</td>
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<td>Ben Lowenthal, University of Maryland, Baltimore County</td>
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<td>Nico Washington, University of Maryland, Baltimore County</td>
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<td>This presentation and roundtable discussion will detail strategies used at both a public and private institution to successfully implement Shared Services on campus. Areas supported by Shared Services include procurement, accounts payable, payroll, hiring, and grants administration. The speakers will share experiences, challenges, and lessons learned. In addition, they will demonstrate and discuss business process improvements and training so that others can use these ideas successfully on their own campuses.</td>
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<td><strong>From Design to Implementation to Evaluation—Lessons Learned in Implementing ERM</strong></td>
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<td>Mike Somich, Duke University</td>
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<td>Raina Rose Tagle, Baker Tilly Virchow Krause, LLP</td>
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<td>This session will explore options available, techniques, errors made, successes, and conclusions reached in implementing enterprise risk management (ERM) programs at Duke University and others, and will examine the areas of program structure, risk models, and timelines for implementation. In addition to reviewing approaches for identifying and managing operating and strategic risks, explore firsthand how to involve and gain the support of senior leaders, audit committees, and governing boards.</td>
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Building and Supporting Your Senior Leadership Team: CAO and CBO Perspective

Maureen Murphy, Emerson College
Michaele Whelan, Emerson College
Howard Teibel, Teibel Inc.

CAOs and CBOs play a key role in developing strategies to address the challenges facing higher education. In this interactive discussion, hear how Emerson College’s CFO and CAO collaborate to support their president’s vision.

Accounting Update—Recent/Proposed FASB and GASB Pronouncements’ Impact on Higher Education Institutions

Jim Creeden, BKD, LLP
Jessica Haag, BKD, LLP

This technical presentation will include a detailed overview of final standards recently issued by the GASB and FASB, and share insights on how those pronouncements could affect higher education institution reporting requirements. The session also provides insights on recently exposed standards including the new Not-for-Profit Financial Reporting Exposure Draft and additional exposure drafts expected to be issued in the coming year.
Thursday, March 10

11:30 a.m.–12:45 p.m. Lunch and EACUBO Update

1–2:15 p.m. CONCURRENT SESSIONS

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<td>CONCURRENT SESSIONS</td>
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<td><strong>Cash Attack: Planning, Execution, and Benefits of Cash Forecasting in a University Treasurer’s Office</strong></td>
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<td><strong>Edward Case</strong>, <em>Temple University</em></td>
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<td><strong>Danielle Colon</strong>, <em>Temple University</em></td>
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<td><strong>TL Hill</strong>, <em>Temple University</em></td>
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<td><strong>Lisa Zimmaro</strong>, <em>Temple University</em></td>
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A treasury cash forecast involving the controller, budgets, investments, and capital programs can reduce financial risk and improve earnings. Speakers from Temple University will demonstrate its internally developed method based on corporate analytical techniques and will explain how its cash forecast for fiscal 2015 achieved a multimillion-dollar reduction in idle bank cash.

Sponsor: RSM

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<tr>
<td><strong>How to Use a Cost Savings Committee to Create Meaningful Budget Savings</strong></td>
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<tr>
<td><strong>Ira Jaskoll</strong>, <em>Fairleigh Dickinson University</em></td>
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Many college and universities have experienced financial challenges during these past years of economic downturn. While at Yeshiva University, Jaskoll served as the associate dean for administration of the SY Syms School of Business and served on the university’s Cost Savings Committee. The committee consisted of financial administrators from various schools and departments at the university. The committee made recommendations to reduce spending and increase income, and many suggestions were accepted and implemented. Jaskoll will discuss some of these recommendations, and follow the discussion with a question and answer session.

Sponsor: RSM
Thursday, March 10

1–2:15 p.m.

**CONCURRENT SESSIONS (continued)**

**LEADERSHIP & TALENT MANAGEMENT**

**Developing Strategic Leaders of the Future—Best Practices**

*Room: Arlington*

Margaret Ann Gray, *Massachusetts Institute of Technology*

Roger Boucher, *Bank of America Merrill Lynch*

David Trainor, *Boston College*

James Czupil, *Bank of America*

Join us for an insightful discussion of best practices for developing the strategic leaders of the future. Hear perspectives from both within higher education and outside industries. The panel will include participants sharing insights from leadership development programs at MIT, Boston College, and Bank of America.

**Higher Ed. and Cyber—Where Are You Vulnerable?**

*Room: Berkeley/Clarendon*

Jim Ambrosini, *CohnReznick LLP*

Educational institutions remain a prime target for cyber attacks because of their collection of highly sensitive data. These data, which are compiled through student loans and enrollment applications, to name a few, can lead to major losses for the students and their families through identity theft. A breach of this magnitude has the potential to disrupt future enrollment and to tarnish the brand through the media. Unfortunately, boards and trustees may not have sufficient backgrounds to establish effective cyber governance, leaving them unprotected. Ambrosini will discuss key examples and case studies of strategies institutions should follow now to protect against cyber threats.

**Sponsor:**

![RSM Logo]
### CONCURRENT SESSIONS

<table>
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<th>Time</th>
<th>Session</th>
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<tr>
<td>2:15–2:45 p.m.</td>
<td>Refreshment Break</td>
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<tr>
<td>2:45–4 p.m.</td>
<td>Experiences Enhancing Administrative Efficiency and Effectiveness</td>
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**Room:** Statler  

**Sponsor:** RAYMOND JAMES

**Experiences Enhancing Administrative Efficiency and Effectiveness**

**Edward Steinmetz,** *The University of Scranton*  
**David Hemingson,** *PricewaterhouseCoopers, LLP*

Colleges and universities are challenged to allocate financial and human resources to core mission functions (that is, instruction, research, and service), contain administrative costs, and offer a high-quality collegiate experience at an affordable cost. Achieving these objectives is a focus of many college and university leaders. The speakers will describe their experiences identifying the need for an initiative to address administrative efficiency and effectiveness and creating streamlined operations by addressing operational issues related to people, process, and technology. Their experiences can be applied by a variety of institutions, from emerging start-ups to highly complex, established university systems.
CONCURRENT SESSIONS (continued)

Higher Education Cost/Revenue Modeling—
Moving Beyond Spreadsheets to Support Strategic Resource Alignment

Ken Cody, Bentley University
Mark Oster, Grant Thornton, LLP

Achieving transparency and financial stability in the higher education business model is a complex and difficult task. This session will explore how a well-designed and constructed higher education cost and revenue model can provide institutions with cost and margin analytic capability far beyond what can be achieved through the use of spreadsheets. Further, the session will explore how a costing system can support an institution’s budgeting process, identify opportunities to focus attention for gaining efficiencies, and explore the relationship between resource investments and mission-related outputs. The session will also explore how organizations have used cost/revenue modeling to reduce, expand, and reallocate their resources to support their mission and strategic plan.

Women’s Forum: Leaning In, Leading Forward

J.J. Wagner Davis, George Mason University
Lynne Schaefer, University of Maryland, Baltimore County
Marta Perez Drake, NACUBO

Mentoring, empowerment, perfectionism, the career ladder—these are some areas covered in Facebook COO Sheryl Sandberg’s bestselling book Lean In: Women, Work, and the Will to Lead. Join an interactive discussion focusing on how women can set realistic expectations, advance in their careers, take risks, and pay it forward. Connect with your fellow female business officers about developing your professional persona, overcoming bias, defining success, identifying mentors/mentees, and leading forward.
Thursday, March 10

2:45–4 p.m.

CONCURRENT SESSIONS (continued)

Higher Ed. Tax Update

Raymond Ly, KPMG LLP
Nancy Murphy, KPMG LLP

The IRS Tax Exempt and Government Entities Division (TE/GE) has released its 2016 Priority Guidance Plan to focus examination resources on certain tax strategic issue areas. This session will provide an update on what colleges and universities should have on their radar as a result of TE/GE’s priorities, including maintaining exemption, protection of assets, unrelated business income, funds spent outside the United States, and tax-exempt bond compliance.

4–5:30 p.m.

Networking Reception

Room: Grand Ballroom B

Sponsors:

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Friday, March 11

7:30 a.m.  Registration
Room: Georgian Foyer

7:30–8:30 a.m.  Networking Breakfast
Room: Grand Ballroom B
Sponsor: J.P. Morgan

8:30–9:45 a.m.  Achieving High Performance Through Positivity
Room: Grand Ballroom
Janet Edmunson, JME Insights

Thinking patterns—including pessimism, inflexibility, and mindless reactivity—are risk factors that inhibit good team dynamics and workplace performance. However, research in positive psychology demonstrates that healthier thinking styles can be learned that foster creativity, engagement, and resilience. This session explores this exciting research as it applies to high performing workplaces and individual employee effectiveness. Edmunson uses science, personal stories, and practical tools from her FEEDS Positivity Model to establish an awareness and practice of these principles and skills.

Sponsor: M&T Bank

10–11:15 a.m.  CONCURRENT SESSIONS
Room: Statler

Building Win-Win E-Learning Partnerships
Manal Meseha, Sussex County Community College
Sara Winchester, Ocean County College

This presentation will describe a partnership between two community colleges that allowed one institution to take advantage of another’s existing technical infrastructure and leapfrog into the world of online instruction with nominal up-front cost and minimum investment of staff time.
**CONCURRENT SESSIONS (continued)**

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<tr>
<th>Time</th>
<th>Session Title</th>
<th>Room</th>
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<tr>
<td>10–11:15 a.m.</td>
<td><strong>“So You Think You Might Want to Start Dating?”</strong> — How to Effectively Explore Opportunities for a Strategic Alliance</td>
<td>Georgian</td>
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<td>Richard Hisey, <em>Berklee College of Music</em></td>
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<td>Eric Norman, <em>The Boston Conservatory</em></td>
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<td>Timothy Hurley, <em>Deloitte</em></td>
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<td>The reasons for exploring opportunities for a strategic alliance (also known as dating) are varied and include augmenting program offerings, sharing costs, and improving market position. Creating alliances among institutions is a delicate process that is filled with many pitfalls and opportunities, both professionally and personally. The speakers will walk you through key steps to consider as you step out into the “dating scene” of higher education.</td>
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<td>Continuing the Conversation: Achieving High Performance Through Positivity</td>
<td>Arlington</td>
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<td>Janet Edmunson, <em>JME Insights</em></td>
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<td>Continuing the conversation Edmunson started in her earlier session, this drill-down discussion focuses on the importance of positivity for leadership. Learn how to provide authentic recognition through easy compliments, gain new perspective on difficult people, and identify alienation on your team. Also learn how to discover and encourage strengths through self-reflection and decide what strengths may need to be dialed up or down.</td>
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Friday, March 11

10–11:15 a.m.  CONCURRENT SESSIONS (continued)

**TECHNICAL FUNDAMENTALS**

Balancing Brevity, Understandability, and Completeness of Financial Statements in a World of Complex Reporting

Room: Berkeley/Clarendon

**Michael Grandchamp**, *Salve Regina University*

**Michelle Spriggs**, *CBIZ Tofias and Mayer Hoffman McCann PC.*

This session will explore best practices in financial reporting with real-life examples of how one university transformed its financial statements to be more transparent, relevant, and useful.

11:15–11:45 a.m. Refreshment and Checkout Break

Room: Grand Ballroom B

11:45 a.m.–1 p.m. CONCURRENT SESSIONS

**EFFICIENCIES/EFFECTIVENESS**

How Creating a One-Stop and Using a Customer Relationship Management System Fosters Student Success

Room: Statler

**Tara Krch**, *University of Massachusetts, Lowell*

**Steven O’Riordan**, *University of Massachusetts, Lowell*

**Thomas Taylor**, *University of Massachusetts, Lowell*

**Nancy Sinsabaugh**, *Transformation in Higher Education, LLC*

Several years ago, UMass Lowell began looking for ways to improve the services it offers its ever-growing student population. With the support of a Davis Educational Foundation Grant, the university’s senior leadership chose to develop both a virtual and physical one-stop location: The Solution Center. This presentation will focus on the story of the decision, planning, and early implementation phases, with emphasis on the strategic importance of the Solution Center. The presentation will also highlight the utilization of Salesforce, a CRM system; the value added of an outside consultant; and the improved integration of services to students that aids in both recruitment and retention efforts.
11:45 a.m.–1 p.m.

**CONCURRENT SESSIONS (continued)**

**Public-Private Partnerships: Strategies and Considerations**

*Room: Georgian*

**Joseph Campbell, Drexel University**

**Patricia Filippone, University of Massachusetts Building Authority**

**Erin Ortiz, Moody’s Investors Service**

Universities are increasingly turning to a growing list of P3 options to generate new revenue streams or support academic programs and student services by monetizing their real estate assets. Specific examples and structures from the University of Massachusetts and Drexel University with practical insights for evaluating capital needs against institutional priorities along with perspectives from a rating agency will be shared.

**Sponsor:**

![Hilltop Securities](image)

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**The Art of Active Listening**

*Room: Arlington*

**Samuel Boyer, Carnegie Mellon University**

Do we ever really listen to our employees? With so much noise—email, social media, phone calls—listening seems to be a lost art form, even though we know that active listening is critical to our overall personal and professional success. Learn about the art of active listening during this interactive session.

---

1 p.m.

**Program Adjourns**
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- Granary Burying Ground
- King’s Chapel
- King’s Chapel Burying Ground
- Benjamin Franklin Statue and Boston Latin School
- Old Corner Bookstore
- Old South Meeting House
- Old State House
- Site of Boston Massacre
- Faneuil Hall
- Paul Revere House
- Old North Church
- Copp’s Hill Burying Ground
- Bunker Hill Monument
- USS Constitution

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