



1919-2019

**EACUBO**

**2019 Annual Meeting**

**LAUNCHING INTO THE FUTURE; POWERED BY THE PAST**

October 13–16 | Baltimore  
The Baltimore Marriott Waterfront

# Schedule at a Glance

## Sunday, October 13

12:00pm - 5:00pm	Registration & Information Desk
3:30pm - 5:30pm	Mentoring Session
6:00pm - 6:30pm	First Time Attendee Reception
6:30pm - 9:00pm	Welcome Reception

## Monday, October 14

7:00am - 5:00pm	Registration & Information Desk
7:30am - 8:30am	CFO Breakfast*
7:30am - 9:00am	Networking Breakfast in the Exhibit Hall
9:00am - 10:15am	General Session I
10:30am - 11:30am	Concurrent Sessions I
11:30am - 11:45am	Break
11:45am - 12:45pm	Concurrent Sessions II
12:45pm - 1:30pm	Networking Lunch
1:30pm - 3:00pm	Dessert in the Exhibit Hall with Micro Sessions
3:00pm - 4:00pm	Concurrent Sessions III
4:15pm - 5:15pm	General Session II
5:15pm - 6:15pm	Happy Hour in the Exhibit Hall
6:00pm - 8:30pm	Regional Presidents' Dinner*
8:30pm - 10:00pm	Cheers! Reception

Program Guide Sponsored by:



## Tuesday, October 15

7:30am - 5:00pm	Registration & Information Desk
7:30am - 8:30am	Business Partner Appreciation Breakfast*
7:30am - 8:30am	Networking Breakfast in the Exhibit Hall
8:30am - 10:00am	General Session III
10:15am - 11:15am	Concurrent Sessions IV
11:15am - 11:30am	Break
11:30am - 12:30pm	Concurrent Sessions V
12:30pm - 1:30pm	NACUBO Update and Lunch
1:30pm - 3:30pm	Ice Cream Social in the Exhibit Hall with Micro Sessions
3:30pm - 4:30pm	Concurrent Sessions VI
6:00pm - 9:00pm	Networking Reception

## Wednesday, October 16

7:30am - 11:30am	Registration & Information Desk
7:30am - 8:15am	Networking Breakfast
8:15am - 9:00am	EACUBO Annual Business Meeting
9:00am - 10:00am	General Session IV
10:15am - 11:15am	Concurrent Sessions VII
11:15am - 11:30am	Break
11:30am - 12:30pm	Concurrent Sessions VIII

\*indicates event is by invitation only

Program Guide Sponsored by:





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On behalf of the Program and Services Committee, I am pleased to welcome you to Baltimore, Maryland, for the EACUBO 2019 Annual Meeting – “Launching Into the Future; Powered by the Past.”

Whether you are here to discuss current issues, learn about best practices, develop professional relationships, or prepare for a promotion, we have crafted this program to provide a wide range of professional development resources.

Our accomplished general session speakers will engage us on important issues facing higher education and the global environment today and into the future. More than 35 concurrent sessions will address a variety of topics including FASB and GASB updates, data analytics, facilities management, leadership, workforce development, and technology.

The Wednesday morning program will feature a forward-looking keynote address, followed by a series of concurrent sessions examining how we can best support our institutions over the next 20 years and beyond.

The Annual Meeting provides a rich environment for social and professional interaction, so you can count on returning to campus with new industry contacts and having caught up with old friends. Our trusted business partners are prepared to discuss the many products and services they offer. Additionally, exhibitors are ready to demonstrate their innovative products and services, all designed to make your job easier and more productive and to add value to your organization.

In closing, we welcome your feedback on your experiences throughout the program, as well as your thoughts on how EACUBO can continue to improve and meet your needs.

A handwritten signature in blue ink that reads 'Steve'.

Stephen Schafer  
Vice President, Finance & Operations, Sarah Lawrence College  
Program & Services Committee Chair



# EACUBO: Launching into the Future; Powered by the Past

This year's theme and meeting location is centered on both honoring EACUBO's long and valued history and returning to the city where it all began. We recognize our past while we work, collectively, towards advancing higher education into the start of our second century.

In 1919, a group of forward-looking business officers created a network motivated by a desire to collaborate and fashion solutions to common problems. Some of the areas they discussed in these formative years would seem quite familiar to present-day business officers, such as budgets, accounting and organizational matters. As we scan and assess the current landscape, given our quickly evolving and challenging environment, understanding our history, culture and institutional formation will be critical to successfully developing and shaping our future.

It is this combination of sharing with others our tried and true best practices, along with each business officer's need to be strategically focused and innovative, which has been at the core of EACUBO for 100 years. When our predecessors met for the first time in Baltimore in 1920, those inspired professionals drew the contours of an association that would shape our collaborative, member-driven network into the future.

Countless EACUBO volunteers have been the steadfast foundation of our shared Association for ten decades. Our 100th Anniversary Committee, formed more than two years ago, coordinated the many special activities and varied components for this centennial meeting and for our 100th year celebration. The Committee, led by Co-Chairs Terry Budd and Sue Perkins, includes Peg Ferber, Bob Helfman, Karen Pedano, Randy Gentzler, Rita Temple Brooks, Mike Gower, and Roger Stackpoole. These exceptional colleagues have dedicated so much of their time, energy, creativity, expertise, knowledge and goodwill to this event. With their work and research, they helped us all recognize and better appreciate that we draw power from the past. From drafting a series of inspirational articles to an incredible 100-year timeline that will help tell the EACUBO story for many years, the Committee also crafted, planned and worked so well with each other, the EACUBO Board of Directors, and the Program and Services Committee on so many topics and meeting components, that it was the very model of collaboration and camaraderie which embodies EACUBO. On behalf of the EACUBO Board, our sincerest thanks and gratitude go to the 100th Anniversary Committee.

We also want to extend our appreciation to the many member institutions that so readily agreed to share their pictures and archival information, which was fundamental to chronicling our history. Further, the enthusiastic participation of our business colleagues who serve as thought-leaders and partners have been critical to EACUBO's long-term success and the opportunities for our exceptional programming this year.

Planning for the future, we will continue to share our best ideas and expertise to foster new and dynamic value-added methodology and solutions. We not only want to confront our industry's headwinds, but excel beyond current expectations--individually and collectively. We are confident that active engagement with EACUBO colleagues will continue to bring exceptional rewards, both personally and professionally. The result: the vital and essential missions that our institutions provide will continue to enhance the local and global communities that we serve.

## EACUBO's KPMG Distinguished Service Award



Each year, EACUBO recognizes an individual who has made significant contributions to the Association's activities. The membership is asked to submit nominees who cultivate and embody a strategic leadership mindset and reflects EACUBO's core values in fostering a sense of community and collegiality. EACUBO is proud to announce this year's honoree, J. Michael Gower!

J. Michael Gower is the Executive Vice President for Finance and Administration & University Treasurer at Rutgers, The State University of New Jersey, and was formerly Senior Vice President for Finance. Gower is the Chief Financial Officer for the University and is responsible for financial management, planning, procurement, and strategic administrative systems initiatives. He oversees Human Resources and Information Technology through the respective Senior Vice Presidents and provides coordination with the Senior Vice President for Enterprise Risk Management, Ethics, and Compliance.

Prior to Rutgers, Gower was Vice President for Business Affairs and Chief Financial Officer at Yeshiva University, Vice President for Finance and Administration and University Treasurer at the University of Vermont, and a higher education management consultant for PricewaterhouseCoopers. He held earlier accounting and financial management roles at Cornell University and Duke University.

Gower is a past Chair of the Board of Directors for EACUBO, serving in numerous other roles over the past 25 years. He was the former chair of the Research Universities Council for NACUBO, was a member of NACUBO's Board of Directors, and chaired its Committee on the Effective Use of Analytics. He was the recipient of NACUBO's Professional Development Award in 2008 and is currently a member of TIAA's Advisory Council.

# Visionary Leadership Award

As EACUBO celebrates the milestone of a century of commitment to strengthening higher education, we wanted to mark this occasion by specifically recognizing an individual whose leadership has had a profound impact on the growth and development of our profession and of the Association itself.

## EACUBO Visionary



**William S. Reed**

Will Reed has held a variety of high-level positions in higher education. His career includes work with the U.S. Atomic Energy Commission (AEC) as a contract negotiator with major research universities and as administrator of the AEC's Health and Safety Laboratory, administrative officer in India and New York for the Ford Foundation, Princeton University as Director of Personnel, Kenyon College as Vice President for Development and Alumni Affairs, Williams College as Vice President for Finance and Administration and Treasurer, and Wellesley College as Vice President for Finance and Administration.

He was one of the founders of the United Educators (UE) (formerly The School College University Underwriters, SCUUL) and was the co-founder of The Boston Consortium for Higher Education, which seeks to reduce administrative costs through collaboration. For more than 20 years, Mr. Reed helped guide the Forum for Higher Education, a national group that brings together thought leaders to work on solutions to complex questions and challenges. He was also very involved with EACUBO and authored many articles for NACUBO as well as the book, *Financial Responsibilities of Governing Boards* that was published by NACUBO and the Association of Governing Boards (AGB) in 2001.

Other governance positions that Mr. Reed has held included: serving as Vice Chair of the Board of Trustees for Colby Sawyer College from 2007 to 2016 and Chair of the Academic Affairs Committee.

Mr. Reed served on the Board of Trustees for the Davis Educational Foundation from 2007 to 2018, serving as Chair of the Board from 2011 - 2018. Under his leadership, the Foundation directly engaged hundreds of University and College leaders in addressing issues of access, cost and quality of higher education.

A recipient of the Award would represent entry into a "EACUBO Hall of Fame," comprised of those who have significantly impacted the Association in its first century, and whose commitments, work, ideals and past leadership are expected to sustain the Association and our shared higher education community for many years to come. In this case, EACUBO has been doubly fortunate to have two such individuals who have been named to receive this recognition with our sincere appreciation. This inaugural class of Visionary Leaders will be celebrated on Tuesday morning, October 15 during our 100th meeting.

It is our privilege to present two recipients of this inaugural award:  
William S. Reed and Yoke San Reynolds.

## Award Recipients



### Yoke San Reynolds

Yoke San Reynolds has served twenty-four years in higher education financial management in eight positions at three universities. She participated in major endeavors including overseeing the merger of two separate finance/business organizations of Cornell University's private and public segments. She also led the effort to build the logistical and financial infrastructure for a brand-new fundraising division at the University at Albany, SUNY. At the University of Virginia, she pioneered new approaches to endowment distribution, bond financing, negotiation strategy for sponsored research reimbursements, performance-based compensation and pooled investment of operating and reserve capital. These innovative approaches have become models for other universities.

Besides developing curriculum and teaching courses for professional associations, Ms. Reynolds has also written articles, reviewed publications and led the development of NACUBO's Management Analysis and Decision Support book. She also co-authored "Finances of Research Universities" for the Council on Governmental Relations (COGR). She served as EACUBO's president in 2005 and on the NACUBO and COGR boards. While serving on the COGR board from 2002-2008, she met with numerous federal agencies - the Office of Management and Budget (OMB), National Science Foundation (NSF), National Institutes of Health (NIH), and Office of Naval Research (ONR) to develop effective interpretations of sponsored-research institutions. As chair of NACUBO's Accounting Principles Council, she led its trailblazing visit to FASB/GASB meetings providing input for the groundbreaking GASB 34/35 requirements on higher education financial reporting.

Ms. Reynolds represented higher education in presenting evidence to federal regulators and legislators to forestall mandatory endowment distributions, and in advocacy efforts in financial aid and federal reimbursements. She believes strongly in developing staff and has consistently recommended individuals for leadership programs, professional opportunities and awards. She credits her EACUBO colleagues for inspiring her and serving as trusted sounding boards throughout her higher education career.



# EACUBO 2019 Annual Meeting Sponsors

EACUBO would like to sincerely thank its business partners for their generous support of the EACUBO Annual Meeting.

## Platinum

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Accenture	Odgers Berndtson
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M&T Bank	Wells Fargo

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## Silver

Baker Tilly	JLL
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BerryDunn	Nixon Peabody LLP
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CliftonLarsonAllen LLP	T. Rowe Price
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## Bronze

Asset Strategy Consultants	Pearson
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CBIZ	Teibel Education Consulting
Century Bank	The Whiting-Turner Contracting Company
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ENGIE	United Educators
HelioCampus	Workday
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# EACUBO 2019

## Annual Meeting Sponsors (by Event)

Accenture	Tuesday Lunch Concurrent Sessions
Aramark	Garment Bag Welcome Reception
Asset Strategy Consultants	Tuesday Breakfast
Attain, LLC	Charging Station
Baker Tilly	Chair's Reception
Bank of America Merrill Lynch	Chair's Dinner Concurrent Session Monday Breakfast in the Exhibit Hall
Barclays	Monday Morning Break
Benchmark Construction	Cheers! Reception
BerryDunn	Ice Cream Social in the Exhibit Hall
Callowhill Capital Advisors, LLC	Networking Reception Entertainment
CBIZ	Networking Reception Entertainment
Century Bank	Bag Insert
Chartwells Higher Education	Monday Dessert in the Exhibit Hall
Citrin Cooperman	Internet Café
CliftonLarsonAllen LLP	Happy Hour in the Exhibit Hall
ENGIE	Meeting Tote
EY-Parthenon	Welcome Reception
Follett Higher Education Group, Inc	Program Guide
FranklinCovey Higher Education	Bag Insert
Grant Thornton	General Session I
HelioCampus	Micro Session
Huron Education	Welcome Reception Bar
Hyatt-Fennell	Networking Reception Bar
J.P. Morgan	General Session II Happy Hour in the Exhibit Hall
JLL	Water Bottle
KeyBanc Capital Markets	Wireless Internet



# EACUBO 2019

## Annual Meeting Sponsors (by Event)

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The Whiting-Turner Contracting Company

TIAA

TruEd Consulting

United Educators

Wells Fargo

Workday

Networking Reception

Concurrent Session

Monday Lunch

Concurrent Sessions

Cheers! Reception

Micro Session

Concurrent Sessions

Micro Session

Networking Reception

Concurrent Session

Welcome Reception Bar

Lanyard

Wednesday Breakfast

General Session III

Chair's Reception

Welcome Reception Bar

Transportation to

Networking Reception

Concurrent Sessions

Micro Session

Welcome Reception Bar

Micro Session

Networking Reception Bar

Chair's Dinner

Regional Presidents' Dinner

Past Presidents' Brunch

Micro Session

Visionary Leadership Award

CFO Breakfast

General Session IV

Networking Reception Bar

# Technology Information

WiFi is Available Throughout Meeting Space

Network: EACUBO 2019

Password: Keybanc2019

Sponsor: **KeyBanc**  
**Capital Markets**  


Navigate the event like a pro with the  
**2019 Annual Meeting** mobile app



Powered by Core-apps

## Mobile App Tips

**Manage** - Tap the gear icon to sync the app across all your devices and build your profile.

**Connect** - Go to the Attendee list icon, select an attendee and "request friend". You can also bookmark exhibitors.

**Create a Schedule** - You can build a personalized schedule by tapping the "Events" icon with the sessions listed by day, just tap the star on the side menu of each session

**Download Presentations** - At the bottom of each session is a Resource Box tap "Handouts".

**Take Notes** - Tap the pencil icon on the side menu of the session. Email the notes to yourself or save them.

**SEARCH** the App Store or Google Play for "EACUBO"

## FOR ALL OTHER DEVICE TYPES:

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Once the app opens, select EACUBO 2019 Annual Meeting and tap Download. If you already have the EACUBO app on your device, open it and tap "Exit to Event List" from the Dashboard to view the app for this event.

Should you have any questions, please contact  
[support@core-apps.com](mailto:support@core-apps.com)

[www.eacubo.org](http://www.eacubo.org)

## Charging Station

Keep your mobile devices charged so you can continue to enjoy the mobile app and tweet about your Annual Meeting experience!

Visit the charging station located in the Harborside Foyer.

Sponsor: 

## Internet Café

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

Sponsor:  **CITRIN COOPERMAN**  
Accountants and Advisors

## Speaker Ready Room

Visit the Speaker Ready Room in the Falkland Room on the fourth floor. This room provides a private space to work on any presentation updates.

### Hours:

Monday, October 14  
7:30 AM–4:00 PM.

Tuesday, October 15  
7:30 AM–4:00 PM





# Continuing Professional Education

Participants submitting requests for CPE credits must provide an adequate record of participation in accordance with the standards issued jointly by the National Association of State Boards of Accountancy and the American Institute of CPAs. In order to meet this standard, EACUBO will require participants wanting CPE credit to check in and out of sessions. You can use the mobile app or check in/out using the kiosk in the room, but you must use the same mechanism for both in and out. (If you use your mobile device to check in, you must use it to check out.)

To check in to sessions using the mobile app:

1. Click on the "CPE management" tile on the app homepage
2. Select your session
3. Enter your information. You will only need to enter your information the first time you check into a session. Your contact information will automatically populate for subsequent sessions.
4. Select "Check in now"

**Note:** The check in option will not be available until 15 minutes before scheduled start time.

To check out of sessions using the mobile app:

1. Click on the "CPE management" tile on the app homepage
2. Press "Check out" and enter the "out" code posted in the room
3. (Optional) Send yourself an email receipt confirmation of participation

Alternatively, you can check in/out of sessions using the kiosk in the back of the room.

1. To check in, type in your last name to find your record, and click check in.
2. Repeat process at the end of the session to check out.

To qualify for CPE you must complete the process outlined above. Credit will not be awarded if you check in more than 10 minutes after the scheduled start time of a session, and/or do not check out within 5 minutes of the end of the session.

- Check in/out and tracking of session attendance is the responsibility of each participant.
- Stop at the EACUBO registration desk to resolve questions regarding checking in/out. Issues will only be corrected on site, not after the conference.
- CPE certificates will be generated based on attendees checking both IN and OUT of sessions within the stated time parameters.
- CPE certificates will be available online within 2-4 weeks for those attendees who complete the process for credit.

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 should be able to do the following:

- Describe the demands placed on higher education business officers; steps to be taken to meet those demands and roles, skills, and qualities essential for success in today's environment.
- Demonstrate an understanding of topics related to many economic changes that will impact colleges and universities while interacting with EACUBO Members, higher education vendors and session speakers.
- Implement best practices in addressing Human Resources related matters.
- Discuss current issues in accounting, technology, financing and taxes.

The EACUBO 2019 Annual Meeting has been certified to award participants up to 13 CPEs in the form of group live presentation. EACUBO strives to provide the best quality programing to all its members and the higher education industry. Should there be a concern with the quality of programing or level of service, please email Stephen A. Schafer, EACUBO's CPE contact, at [sschafer@sarahlawrence.edu](mailto:sschafer@sarahlawrence.edu).



# Sunday, October 13

12:00 PM - 5:00 PM

## Registration Open

Harborside Registration

3:30 PM - 5:30 PM

## Fall Mentor Session

Galena

6:00 PM - 6:30 PM

## First-Time Attendee Reception

Harborside Ballroom Foyer

6:30 PM - 9:00 PM

## Welcome Reception

Harborside Ballroom

## EACUBO's celebrates 100 years and excitedly launches into the future

At this year's Annual Meeting Welcome Reception, you will be transported through four eras that shaped EACUBO and brought it to the EACUBO you know today. Each of these eras will be represented by a timeline of events, memorabilia and hosts in period costume. In the center of these historic representations a separate area will illuminate the future and celebrate EACUBO's next 100 years.

We encourage you to join EACUBO volunteers and dress in the style of your favorite era. Bring out your flapper dress, your letter jacket or your platform sandals and share in the fun.

### 1919 through 1944

#### **Wars, Prosperity, Depression, and The New Deal**

Stock Market Crash; Amelia Earhart; Babe Ruth; Louis "Satchmo" Armstrong; Albert Einstein; The Manhattan Project; The Holocaust; Pearl Harbor; Rosie the Riveter; Big Band Swing; Speakeasy; Charlie Chaplin; Walt Disney; Al Jolson; It Happened One Night; Gone with the Wind; Orson Wells; Citizen Kane; 19th Amendment Ratified

### 1945 through 1960

#### **Postwar America**

A time of great economic growth and prosperity; confrontation and cold war; Civil Rights movement; The Bomb; McCarthyism and the Hollywood Blacklist; Brown vs. the Board of Education; Elvis; Buddy Holly; Alfred Hitchcock; On the Waterfront; Marlon Brando; Psycho



## 1960 through 1989

### The Vietnam Era and Post Vietnam

Martin Luther King, Jr; Bay of Pigs; Vietnam; Roe v. Wade; Muhammad Ali; Hank Aaron; Henry Kissinger; The Beatles; Hunter S. Thompson; Hippie Movement; The Rolling Stones; David Bowie; ABBA; West Side Story; Breakfast at Tiffany's; Star Wars; Stephen Spielberg

## 1990 through 2019

### The End of the Century; New Millennium; The Great Recession

The internet becomes widely used publicly; Y2K; The economic bubble burst, "Too Big to Fail", Facebook; Tom Hanks; Taylor Swift; Hip Hop; One Direction

Sponsors:



PARTHENON



# Monday, October 14

7:00 AM - 5:00 PM

Registration Open

Harborside Registration

7:30 AM - 9:00 AM

CFO Breakfast (by invitation only)

Harborside Ballroom A

Sponsor:

**WELLS  
FARGO**

7:30 AM - 9:00 AM

Networking Breakfast in the Exhibit Hall (prize drawing)

Grand Ballroom

Sponsor:

**Bank of America**   
**Merrill Lynch**

9:00 AM - 10:15 AM

General Session: Geena Davis

Harborside Ballroom C-E



Academy Award-winning Actor and Advocate Geena Davis is one of Hollywood's most respected actors, appearing in several roles that became cultural landmarks.

Davis received the Academy Award for Best Supporting Actress for her role as the offbeat dog trainer Muriel Pritchett in Lawrence Kandan's *The Accidental Tourist*. She was again nominated for an Academy Award and Golden Globe for her performance in Ridley Scott's *Thelma & Louise*, in which she co-starred with Susan Sarandon. Davis went on to receive a Golden Globe nomination for Best Actress for her portrayal of baseball phenomenon 'Dottie Hinson' in *A League of Their Own*.

Earning the 2006 Golden Globe Award for Best Performance by an Actress in a Television Series - Drama, Davis broke ground in her portrayal of the first female President of the United States in ABC's hit show *Commander in Chief*. Davis made her feature film debut starring opposite Dustin Hoffman in *Tootsie*. She went on to star in such films as *The Fly*, *Beetlejuice*, *Angie*, *The Long Kiss Goodnight* and *Stuart Little*. Few have achieved such remarkable success in as many different fields as Davis has: she is not only an Oscar and Golden Globe-winning actor, but a world-class athlete (at one time the nation's 13th-ranked archer), a member of the genius society Mensa, and is now recognized for her tireless advocacy of women and girls nearly as much as for her acting accomplishments. She is the Founder and Chair of the non-profit Geena Davis Institute on Gender in Media, which engages film and television creators to dramatically increase the percentages of female characters

Monday, October 14

– and reduce gender stereotyping – in media made for children 11 and under. Davis was appointed Special Envoy for Women and Girls in Information and Communications Technology (ICT) for the UN's International Telecommunication Union (ITU) and is an official partner of UN Women. She is also co-founder and chair of the Bentonville Film Festival (BFF), whose mission is to champion women and diverse voices in all forms of media.

Geena Davis and festival co-founder Trevor Drinkwater founded the Bentonville Film Festival in 2015 to champion women in media. BFF's mission is to encourage content creation in film and other forms of media that reflects the diverse – and half female – world we live in. BFF proactively supports content creation by women and diverse voices with a platform to showcase their work and, with the help of our partners, is the only film competition in the world to guarantee theatrical, television, digital and retail home entertainment distribution for its winners. The Festival takes place in early May in Bentonville, Arkansas and is research based and commercially driven. Most recently, Davis starred in 20th Century Fox's *The Exorcist*; a serialized psychological thriller based on the 1971 book of the same name, *Marjorie Prime*, based on the Award-Winning play and *Dear Angelica*, one of the first VR narrative films from *Oculus*.

Davis holds honorary degrees from Boston University, Bates College and New England College.

Sponsor:  **Grant Thornton**

10:30 AM - 11:30 AM

## Concurrent Sessions

### Accounting Update

Harborside Ballroom A

David Jacobson, *CliftonLarsonAllen LLP*

Nothing is certain in life but change - how higher education institutions anticipate and plan for changes in accounting rules can help to ensure stakeholders are well-informed of new rules that can have a significant impact on decision making. During this session, the speaker will focus on identifying areas where accounting issues are most likely to occur, including technical updates on topics such as revenue recognition, lease accounting, not-for-profit financial statement presentation, and the recent FASB exposure draft on grant and contribution accounting. At the end of this session, you will be able to describe the technical requirements of these new and proposed standards and take away practical implementation guidance and examples to help your institution determine the best path forward.

## Aligning Technology Investments to Strategic Plans

Harborside Ballroom B

Carol Bishop, *SUNY College of Technology at Delhi*

Michael Davis, *Delaware Valley University*

Leon Wyden, Jr., *Frostburg State University*

Rajiv Shenoy, *Apogee*

Aligning technology investments to meet the needs of today's "connected" generation is fundamental to fulfilling our strategic plans. But implementing key parts of the plan can be challenging. How do we innovate to meet student demand, enhance the learning-living experience, and create a sustainable business model—all at the same time?

This unique panel will address the inescapable transformations technology have required of institutions large and small, public or private. It will also shed light on how technology can help drive the future of teaching, learning, research and the entire university experience to achieve our strategic plans.

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

Laurel

Melody Bianchetto, *University of Virginia*

Gloria Graham, *University of Virginia*

Barbara Constantz, *J.P. Morgan Chase*

Jennifer Zuccarelli, *J.P. Morgan Chase*

There has never been a shortage of ways in which colleges can end up on the front page of the newspaper. In recent years, race, gender, divisive political issues, and even violent confrontation have eclipsed past campus crises surrounding hazing incidents or parties. In the age of social media, the impact of these incidents are not only lightning-quick, but range far beyond the confines of the campus. As such, the administration's response is crucial in maintaining trust and accountability in the eyes of current and prospective students, alumni and donors. In this discussion, we'll examine how the University of Virginia responded to events in Charlottesville from August 2017 and how they managed the message of the University while creating a forum for broader discussion by their students, faculty, and community. In addition, hear from JPMorgan Chase's Director of Corporate Communications regarding effective social media strategies utilized by the firm. College business officers, along with their communications and security colleagues, will have the opportunity to discuss how they've structured lines of communication in their administration, and what resources they've put in place to prepare for the unexpected.

Monday, October 14

## Leveraging Business Unit and Laboratory Operations Collaboration to Implement University-wide Solutions

Kent

**Dorothy Hunter**, *University of Pennsylvania*

**James Riley**, *University of Pennsylvania*

Distributed business units and their associated research operation teams benefit tremendously from close collaboration. The role of the research administrator continues to evolve beyond managing grants and contracts while ensuring sound compliance practices. Increasingly, the realm of financial and research operations dovetails with considerations of computing, facilities, environmental health, safety and security. Building upon the understanding of what happens across the aisle, or more appropriately here, across the laboratory bench, can benefit all involved.

In this session speakers will present a case study of small key enhancements implemented in consideration of the greater research community, bridging business units with laboratory research operations scaled to benefit the larger institution. The session will include an interactive exercise to promote and explore opportunities for collaboration between central offices, business units, operational teams, faculty and the remaining end-user community.

## Looking Upward: How Moving IT to the Cloud Can be More Efficient and Effective (If You Do it Right)

Essex

**Paul Friga**, *University of North Carolina*

**Randall Gentzler**, *Loyola University Maryland*

**Scott Midkiff**, *Virginia Polytechnic Institute and State University*

**Dwayne L. Pinkney**, *Virginia Polytechnic Institute and State University*

**Randall Saba**, *Loyola University Maryland*

The pressures for university business officers continue to rise - fiscal, political, environmental, and technological. How do we maintain high-quality administrative support with decreasing resources and increasing levels of risk? One potential solution could be moving IT to the cloud. While still an emerging trend, universities are beginning to see benefits in terms of cost savings and operational improvements. Join us for an interesting panel of two universities (one large and one small) who have taken the plunge and learned valuable lessons to share. Loyola University began its IT improvement journey in 2016 as part of a holistic approach to restructure IT to eliminate redundancies, streamline decision-making, and increase IT service levels within the university. Virginia Tech has established a national reputation for its innovative approaches to cloud IT, particularly related to cyber security. Dr. Paul Friga, a noted strategy professor, will facilitate the session to tease out challenges, best practices and tips for business officers of universities of any size.

Sponsor:

 **accenture**

11:30 AM - 11:45 AM

## Break

Harborside Ballroom Foyer

Sponsor:  **BARCLAYS**

11:45 AM - 12:45 PM

## Concurrent Sessions

### 2018 NACUBO - TIAA Study of Endowments

Kent

**Matthew Hamill**, *NACUBO*

**Mike Collins**, *TIAA*

The annual study analyzes return data and a broad range of related information gathered from U.S. colleges and universities, both public and private, as well as their supporting foundations. The size and scope of the study make it the most comprehensive annual report on the investment management and governance practices and policies of institutions of higher education across the U.S.

The 802 institutions in this year's study represented \$616.5 billion in endowment assets. While the size of the median endowment was approximately \$140.2 million, 41 percent of study participants had endowments that were \$101 million or less. This session will provide unique sets of data along with corresponding implications that specific and relevant to EACUBO members.

### Beyond Title IX - Abuse and Harassment Crisis Response in the Wake of #MeToo

Essex

**Laura Angelini**, *Hinckley Allen*

**Christina Lewis**, *Hinckley Allen*

The #MeToo movement has brought national attention to harassment and abuse allegations. The speakers (a government investigations/white collar defense attorney and a labor and employment attorney) will focus on the multi-faceted and heightened risk for colleges and universities, faculty members and students. They will provide an overview of the state of Title IX investigations, the proliferation of criminal investigations and private rights of action, and best practices for handling harassment and abuse claims. The speakers will provide real scenarios and discuss lessons learned from these actual cases.

Monday, October 14

## Energize Reporting at Your Campus

Harborside Ballroom A

Beth Corry, *University at Buffalo*

Tom Okon, *University at Buffalo*

Jennifer Lynn Pesany, *University at Buffalo*

As the higher education model changed so too did the reporting needs at our campus. This presentation will highlight how our institution successfully updated traditional campus reporting in an effort to engage audiences at all levels of the university, drive change, advance data driven decision making and promote accountability. We will highlight historical traditional reporting dashboards still widely utilized across campus today, followed by a deeper dive into our reporting journey. Dashboards geared toward unit business officers, academic chairs, gift officers and specific initiatives will be demonstrated.

Sponsor:



ODGERS BERNDTSON

## Survive or Thrive: Succeeding in Today's Evolving Higher Education Environment

Harborside Ballroom B

David Chard, *Boston University*

Michael Hoyle, *Lasell College*

Michael Cooney, *Nixon Peabody LLP*

Kasia Lundy, *Ernst & Young LLP*

The panel will focus on proactive strategies to help boards, presidents, and leadership teams assess financial and operating risks and develop realistic and actionable responses. Among other things, the panel will explore how a new financial health metric can provide college and university leadership teams with visibility into the relative strategic health of their institutions and enable action before regulatory pressures limit operational options. College participants will share how they are responding to the increased pressures in the higher education sector, how they are building on their institutions' core strengths to not only survive but thrive, how they make difficult resource allocation decisions, and how they engage their boards to advance these challenging topics effectively.

Sponsor:

**STIFEL**

## Tax Update

Laurel

Kerri Bogda, *Baker Tilly Virchow Krause, LLP*

This presentation will provide an overview of tax provisions that impact higher education including the current status of regulatory guidance and forms.

Monday, October 14

12:45 PM - 1:30 PM

## Networking Lunch

Harborside Ballroom C-E

Sponsor: **M&T Bank**

1:30 PM - 3:00 PM

## Dessert in the Exhibit Hall and Micro Sessions (prize drawing)

Grand Ballroom

Sponsor: **chartwells**  
where hungry minds gather 

3:00 PM - 4:00 PM

## Concurrent Sessions

### Bond Investor Perspective in University Debt Financings

Kent

**Al Diaz**, *Marymount University*

**Ellen Herbst**, *University System of Maryland*

**Mary Kay Cooney**, *Moody's Investors Service*

**Lilly Scher**, *Eaton Vance Corporation*

In this session, the audience will gain insight on not only the different types of debt structures and securities used by universities to meet funding needs, but also how attributes of the higher education sector, university credit and funding structure weigh in on investors' decisions to purchase or sell bonds held in their portfolios. The audience will hear from financial officers of two very different institutions: University System of Maryland (USMD) and Marymount University, in addition to a senior analyst from Eaton Vance investment Managers. USMD has a strict \$1.4 billion cap debt policy and must assess capital needs over multiple campuses. Arlington, Virginia-based Marymount has doubled its debt portfolio in the last five years as part of a strategic plan to expand its brand and diversify revenue. While universities are focused on meeting strategic funding priorities, fund investors are focused on an institution's underlying credit quality, as well as a bond issue's legal and structural considerations given changing market conditions. A Moody's analyst will moderate the panel, opening with broader trends seen in the higher education debt market. Audience members will be encouraged to raise questions and discussion items during the presentation.

Sponsor: **M&T Bank**

Monday, October 14

## HR 101: Preventing Claims and Protecting the Institution

Essex

**Audra Jean Kahr**, *Cedar Crest College*

**Edward Easterly**, *Hoffman, Hlavac & Easterly*

In this workshop session attendees will review legislative, regulatory and case-law developments concerning pressing topics to higher education clients, such as: discrimination, harassment, #MeToo movement, disability and accommodations issues, FMLA, ADA and implemented rules and regulations under the Trump Administration, medical marijuana and social media. Attendees will hear from a Chief Business Officer and their external general counsel on how to approach potential risks, limit liability, effectively train employees and how to communicate effectively on legal matters. So often employees within an organization are not presented with training on human resource related matters and as a result end up placing the organization at risk. This presentation will address the much-needed levels of communication that are needed within an organization to effectively handle human resource matters.

## Stakeholder Advice for Successful RCM Implementation

Harborside Ballroom A

**Rob Hoover**, *University of Virginia*

**Eduardo Lorente**, *University of Virginia*

Speakers will share lessons learned during the post-responsibility center management implementation review process. Presenters will discuss how administrators viewed the results of the adoption, thus helping to answer the question of whether RCM created the change intended. Participants in the session will be provided with key takeaways and significant findings.

## State of Higher Education

Harborside Ballroom B

**Dennis Morrone**, *Grant Thornton LLP*

**Mark Oster**, *Grant Thornton LLP*

In our annual State of Higher Education report, we offer our experience-based viewpoints, approaches and solutions that inform decision-making and position your institution for success. This session will summarize our guidance on important developments and challenges facing higher education leadership, including imagining a future with national universities; effecting greater change through data analytics; planning your response to the inevitable data breach; supporting students with mental health challenges, interrelated entities; administrative alchemy for superior outcomes; using artificial intelligence to transform operations; the evolving role of ethics and compliance; employing nontraditional approaches to fill talent gaps; and other timely topics.

Sponsor:



**MERCER**

## The Change Agency: Sustaining Disruptive Change Through Proactive Leadership

Laurel

Cameron McCoy, *Lehigh University*

Phil Nazzaro, *Southern New Hampshire University*

Is your administration interested in getting proactive about change to ensure a sustainable and vibrant future for your university? Are you eager to explore how to create the right environment for natural, valuable, and creative change? Are you a leader who is curious about comparative organizational models and frameworks of change? Then we have some stories for you to hear! While scholars and practitioners have proactively explored leadership and change in higher education since the early 2000s, there have been few identifiably sustainable shifts in our institutions. Using a comparative case study approach, the presenters from Southern New Hampshire University (SNHU) and Lehigh University (LU) will provide insight into proactive change management, institutional leadership and innovation culture, and systemic problem solving through adaptable organizational constructs. This presentation isn't a mediocre panel presentation and it isn't a vanilla set of mind-numbing slides...toss aside isomorphic tendencies and explore how to create The Change Agency for your institution.

Sponsor:  **accenture**

4:00 PM - 4:15 PM

Break

Harborside Foyer

4:15 PM - 5:15 PM

General Session: Freeman Hrabowski

Harborside Ballroom C-E



Freeman A. Hrabowski, III, has served as President of The University of Maryland Baltimore County (UMBC) since 1992. His research and publications focus on science and math education, with special emphasis on minority participation and performance. He chaired the National Academies' committee that produced the 2011 report, *Expanding Underrepresented Minority Participation: America's Science and Technology Talent at the Crossroads*. He was named in 2012 by President Obama to chair the President's Advisory Commission on

Educational Excellence for African Americans. His 2013 TED talk highlights the "Four Pillars of College Success in Science."

In 2008, he was named one of America's Best Leaders by U.S. News & World Report, which ranked UMBC the nation's #1 "Up and Coming" university for six years (2009-14). For the past three years (2015-17),

U.S. News ranked UMBC in the top ten on a list of the nation's "most innovative" national universities. For the past nine years, U.S. News also consistently ranked UMBC among the nation's leading institutions for "Best Undergraduate Teaching." TIME magazine named him one of America's 10 Best College Presidents in 2009, and one of the "100 Most Influential People in the World" in 2012. In 2011, he received both the TIAA-CREF Theodore M. Hesburgh Award for Leadership Excellence and the Carnegie Corporation of New York's Academic Leadership Award, recognized by many as the nation's highest awards among higher education leaders. Also in 2011, he was named one of seven Top American Leaders by The Washington Post and the Harvard Kennedy School's Center for Public Leadership. In 2012, he received the Heinz Award for his contributions to improving the "Human Condition" and was among the inaugural inductees into the U.S. News & World Report STEM Solutions Leadership Hall of Fame.

Sponsor: **J.P.Morgan**

**5:15 PM - 6:15 PM**

**Happy Hour in the Exhibit Hall**

**Grand Ballroom**

This networking event includes a variety of appetizer options and beverages. Visit with each exhibitor and learn more about products and services that may help your institution. Please make time to thank the exhibitors for their participation and support of the EACUBO 2019 Annual Meeting.

Sponsors:  **CliftonLarsonAllen** | **J.P.Morgan**

**8:30 PM - 10:00 PM**

**Cheers! Reception**

**Harborside B**

Where everyone knows your name! After dinner, gather with your friends and colleagues in the EACUBO "living room" for a sweet bite and a beverage. Comfortable seating and a low-key atmosphere provide a relaxed setting to share what you have learned throughout the program. It's a perfect way to end a very productive and fun day.

Sponsors:  **BENCHMARK**  
CONSTRUCTION™

 **NIXON**  
**PEABODY**

Tuesday, October 15

7:30 AM - 5:00 PM

Registration Open

Harborside Registration

7:30 AM - 8:30 AM

Networking Breakfast in the Exhibit Hall (prize drawing)

Grand Ballroom

Sponsor:  ASSET STRATEGY  
CONSULTANTS

8:30 AM - 10:00 AM

Harborside Ballroom C-E

Visionary Leadership Awards Presentation  
and General Session

Sponsor:  United  
Educators

## General Session: Susan Cain



Susan Cain is the Chief Revolutionary of Quiet Revolution and the author of the bestsellers *Quiet Power: The Secret Strengths of Introverts*, and *Quiet: The Power of Introverts in A World That Can't Stop Talking*, which has been translated into 40 languages, is in its seventh year on the New York Times best seller list, and was named the #1 best book of the year by Fast Company magazine, which also named Cain one of its Most Creative People in Business. LinkedIn named her the 6th Top Influencer in the world. Her writing has appeared in the *The New York Times*, *The Atlantic*, *The Wall*

*Street Journal*, and many other publications. Her record-smashing TED talk has been viewed over 20 million times and was named by Bill Gates one of his all-time favorite talks. Cain has also spoken at Microsoft, Google, the U.S. Treasury, the S.E.C., Harvard, Yale, West Point and the US Naval Academy. She received Harvard Law School's Celebration Award for Thought Leadership, the Toastmasters International Golden Gavel Award for Communication and Leadership and was named one of the world's top 50 Leadership and Management Experts by Inc. Magazine. She is an honors graduate of Princeton and Harvard Law School. She lives in the Hudson River Valley with her husband and two sons. Visit Cain and the Quiet Revolution at [www.quietrev.com](http://www.quietrev.com).

Sponsor:  **Santander**  
Commercial Banking

Tuesday, October 15

10:15 AM - 11:15 AM

## Concurrent Sessions

### Building Momentum and True Dialogue in Strategic Planning

Harborside Ballroom A

Taylor Scott, *Rhode Island School of Design*

Rebeka Mazzone, *CitrinCooperman*

Howard Teibel, *Teibel Education Consulting*

With increasing pressure on higher education to demonstrate greater value and to educate students in new ways, we are being forced to make major changes in how we operate. Our strategic plans need to reflect those new ways of operating and prioritize the resources necessary to implement change.

How do you engage your entire campus community to make such a commitment? We are all aware that there is the writing of the plan; which is separate and apart from the undertaking of and commitment to the plan. Engage with the Rhode Island School of Design (RISD) to learn how to develop a campus-wide effort to vision a strategy and prioritize resources to gain community buy-in and commitment. This initiative involved leaders from the President's Cabinet, Deans Council and faculty to align institutional priorities with their Academic Plan. Learn how to bring everyone along in the conversation through candid dialogue, active listening and ability to put individual needs aside to create passion and enthusiasm for the Plan.

### High Stakes Scenario Planning: When Missing the Target is Not an Option

Harborside Ballroom B

Louis Mayer, *Stevens Institute of Technology*

Theresa Pascoe, *Stevens Institute of Technology*

Kevin Kuhar, *PFM Group*

Scenario planning is an engaging, creative, and valuable way to develop the groundwork for multi-year financial planning. Stevens Institute of Technology (SIT) provides an excellent example of using scenario planning to make major decisions in a challenging environment - and protecting institutional financial health against future uncertainties.

Simultaneously experiencing a recent decline in graduate enrollment while undertaking a massive \$250 million capital project to accommodate its planned growth in undergraduate enrollment, it was not enough for SIT to "probably" succeed. The plan had to succeed under a range of possible alternative futures. Based on the different scenarios, the financial planning team formulated corrective measures by articulating flexible strategies to ensure that the institution has the ability to compete in the future - whatever the future environment brings. SIT will explain why and how debt affordability and ratio target boundaries were determined.

## The Tax Cuts and Jobs Act Heightens Awareness of Unrelated Business Income

Essex

**Alyce Franklin-Owens**, *Kean University*

**Susan Perkins**, *Middlesex County College (retired)*

**Garrett Higgins**, *PKF O'Connor Davies*

**Joseph Russell**, *PKF O'Connor Davies*

With the provisions of The Tax Cuts and Jobs Act (TCJA) in full effect for 2018 many colleges and universities are reviewing their exposure to unrelated business income. While the TCJA has brought an increased focus on employee benefits such as qualified transportation, parking and use of on-premise athletic facilities, other far more significant areas of exposure may exist. Our presenters will provide an in-depth discussion on the TCJA and various other unrelated business income generators including income from alternative investments, rental activities, advertising and corporate sponsorship income which are common in today's world of higher education. Our panel will discuss how a campus wide review of activities lead to its current course of compliance with unrelated business income tax laws. Audience members are encouraged to engage in dialog and present questions related to income sources and unrelated business income tax compliance issues

## Weighing the Cost and Effectiveness of Cybersecurity

Laurel

**David Gingerella**, *University of Massachusetts*

**Gary Federico**, *SecureLinQ*

With recent high-profile data breaches at colleges and universities resulting in lawsuits and bad publicity, cybersecurity continues to be a frequent hot topic within higher education. This session is intended to educate non-technical attendees on the value, cost and risk associated with selecting a cybersecurity solution. It will also help the attendees evaluate their current situation and help them understand the associated risks and trade-offs of not addressing this issue before a breach happens.

## Working with Consultants - How to Make the Relationship Win-Win

Kent

**Andrew Mangels**, *University of Massachusetts*

**Ken Kaiser**, *Temple University*

**Paul Friga**, *University of North Carolina*

Many consulting firms have launched divisions and teams dedicated to higher education. Consulting in general is big business, over \$150-200B globally, with up to 10% of that focused on higher education. The reason: universities are in a period of high pressure for change and consultants can provide specialized knowledge, disciplined problem solving, use of data, and outside perspective. This panel will explore the use of consultants

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in higher education – from understanding how they work, deciding when consultants make the most sense to assist, and identifying best practices for successful pre-engagement, engagement and post-engagement. Join a strategy professor, who is a former consultant with McKinsey and PwC and author of two books on consulting, as he interviews two seasoned CBOs who have significant first-hand experiences with consultants and want to share lessons learned and advice for anyone working with, or considering employing, consultants in a university setting. War stories and experience sharing with attendees will bring this interactive session to life!

Sponsor:  **MERCER**

11:15 - 11:30 AM

**Break**

**Harborside Ballroom Foyer**

11:30 AM - 12:30 PM

**Concurrent Sessions**

## **Getting to Zero: Developing an Energy Strategy to Meet Climate Action Planning Goals**

**Kent**

**William Anderko, Jr.**, *Haverford College*

**Jesse Lytle**, *Haverford College*

**Darren Cassel**, *The Stone House Group*

**James Hayes**, *The Stone House Group*

As ideas related to sustainability continue to grow on college campuses, college administrators and facilities directors look to develop plans that align campus infrastructure and facilities to fulfill sustainability goals. Haverford College sought a plan that would help them achieve their goal to have a net-zero campus by 2033. To support this goal, the College partnered with The Stone House Group, a facilities and energy management consulting firm, to develop a comprehensive Energy Strategy for Sustainability that will ensure the campus has reliable, safe, sustainable, and cost-effective energy infrastructure to support the College's educational mission.

The session will discuss how each study contributed to the overall energy strategy, and the best practices that were used and learned through the process.

## How to Provide a Connected Experience While Maintaining a Secure Environment on a Higher Education Campus

Essex

Peter Hastings, *Merrimack College*

Ray Gandy, *CBIZ*

Michelle Spriggs, *CBIZ*

In today's technology world filled with the internet of things, mobile devices, and new software and learning tools, higher education campuses can be a challenging environment for providing excellence in a campus experience while still addressing security risks. Each new device introduces a new challenge with ways an educational institution's network of data needs to be protected. How exactly does a Higher Education organization provide the optimal connected campus experience, while maintaining security? This presentation will provide an understanding of best practices and what leadership needs to know to discuss the impact breaches can have, beyond financial risk and liability, but also reputational, on their campuses.

## Major Fundraising Campaigns and/or An Enhanced Research Focus Promote Financial Sustainability

Laurel

Daniel Ennis, *Johns Hopkins University*

Sidney Evans, Jr., *Morgan State University*

Ken Rodgers, Jr., *S&P Global*

Colleges and universities are looking for transformational activities to undertake so that they can survive and thrive in an increasingly competitive environment. Launching a major fundraising campaign and/or undertaking an initiative to become, or expand, a college or university with a research focus can elevate a school's perceived stature among its peers. Hear from local financial leaders of a public and private university how their school's reputation and financial position have been enhanced by vigorously pursuing these commitments and at what cost. Audience members will be able to speak directly with the presenters and find out how key stakeholders such as trustees, other administrators, faculty and alumni have to be fully engaged to make this effort a success.

Sponsor: **STIFEL**

Tuesday, October 15

## Mindful Leadership

Harborside Ballroom A

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

**Jacqueline Carter**, *Potential Project*

**Margaret F. Plympton**, *Odgers Berndtson*

Universities and colleges are experiencing a crisis of engagement. According to Gallup, only 34% of university faculty and staff are engaged in their jobs. Today's workers are increasingly looking for more human connection and meaning. They want to feel valued and believe that what they do matters. To build cultures of excellence, people must be at the center of the organization's strategy. Research conducted with Harvard Business Review of over 35,000 global leaders has discovered that people-centric leadership is key to achieving enhanced performance, engagement, and job satisfaction.

Three key leadership qualities create cultures of excellence: mindfulness, selflessness and compassion. Mindful leaders govern themselves well, and thereby lead their teams and organization well; they enjoy enhanced performance, memory, innovation, resilience, ethical decision making, and overall job satisfaction. Selfless leaders take the bigger picture into account rather than their own egoistic needs. Compassionate leaders show others that they have their back. This presentation and discussion will help attendees understand why people-centric cultures lead to cultures of excellence, how to develop them within their organizations, and how to apply mindfulness, selflessness and compassion to daily life as a leader. The session will be very interactive and engaging with real stories, fun exercises, informal polling, Q&A, pair discussions, and practical tips to implement right away.

Sponsor:  [ODGERS BERNDTSON](#)

## Practical Lessons Learned from Implementing Process Reviews

Harborside Ballroom B

**Irene Mauch**, *University of Massachusetts System*

**Lauren Turner**, *University of Massachusetts Lowell*

**Joanne Yestramski**, *University of Massachusetts Lowell*

In today's environment of driving constant improvement, efficiency and effectiveness in all that we do, understanding and practicing process improvement is distinct advantage. This dynamic interactive session takes an entertaining, yet practical and insightful look at Business Process Review (BPR). It provides participants with a new perspective for approaching a problem or process change. As we walk through the five key steps of process review and redesign, we discuss the fundamental techniques while sharing the positive wins as well the roadblocks encountered at the University of Massachusetts multiple campus environment. Our goal is to help the participants implement these techniques in their own organizations.

Sponsor:  **pfm**

12:30 PM - 1:30 PM

## Lunch and NACUBO Update

Harborside Ballroom C-E

Sponsor:  **accenture**

1:30 PM - 3:30 PM

## Ice Cream Social in the Exhibit Hall and Micro Sessions (prize drawing)

Grand Ballroom

Sponsor:  **BerryDunn**

3:30 PM - 4:30 PM

## Concurrent Sessions

### Evaluating Sourcing Strategies for University Risk and Audit Functions

Laurel

Edward Steinmetz, *The University of Scranton*

James Yard, *Schneider Downs & Co., Inc.*

Join Ed Steinmetz, Senior VP for Finance and Administration at The University of Scranton, and Jim Yard, Shareholder, Risk Advisory Services at Schneider Downs, as they discuss strategies to evaluate the effectiveness of universities' risk and audit functions and provide a roadmap to selecting and evaluating a strategic sourcing partner.

### Gender in the Workplace

Harborside Ballroom A

Laura Hubbard, *University at Buffalo*

Stephen Schafer, *Sarah Lawrence College*

Nicole Trufant, *University of New England*

Men, women, and intergender individuals do not routinely engage in conversation about gender disparities, even though all genders need to be a part of the conversation. Many men, like women, are afraid to discuss gender equity issues. Research studies show that mixed-gender teams and partnerships are much more successful than same-gender groups. Join a mixed-gender panel to discuss Joanne Lipman's book "That's What She Said, What Men Need to Know (and Women Need to Tell Them) About Working Together."

The panel will engage in an interactive dialogue about the gender gap, wage gap, respect, and some of the myths surrounding gender in the workplace.

Sponsor:  **Bank of America  
Merrill Lynch**

Tuesday, October 15

## Improving Supplier Diversity: Having a Diverse Supplier Base Can Support Institutional Goals

Kent

Suzanne Bellan, *Princeton University*

Mohamed Ela, *Princeton University*

Michael Karl, *Princeton University*

Princeton University is committed to making supplier diversity an integral part of the way it does business, consistent with its commitment to a diverse and inclusive university community. Our commitment is driven by the belief that engaging a diverse supply base is mutually beneficial; fostering competition, opportunity, and generating considerable value by broadening the pool of supplier expertise, perspectives, and capabilities. In this session you will learn how Princeton developed metrics and analytics to assess the progress of the initiative, worked with campus stakeholders to promote inclusion of more diverse suppliers in competitive bidding, and fostered innovative partnerships with diverse suppliers in the local community as well as with a student program in which teams work in partnership with University administrators to understand the challenges and opportunities of diversity in procurement, and ultimately design new processes and campus implementation plans.

## Mergers and Acquisitions as a Path to Sustainability and Stewardship - Accounting, Legal and Regulatory/Accreditation Considerations

Essex

Carolina Avellaneda, *University of Massachusetts*

Richard Hisey, *Berklee College of Music*

D.R. Widder, *Babson College*

Megan DeGrass, *Goldman, Sachs & Co.*

Jessica Wood, *S&P Global Ratings*

Several high-profile mergers and acquisitions in higher education have increased discussion around strategic affiliations to enhance long term sustainability of institutions. The panel will include commentary on legal and accounting considerations, important points of negotiation and "lessons learned" in a developing area. In addition, panel members will discuss increased regulatory scrutiny on the viability of institutions and the ramifications of the accreditation process, and the impact on mergers, acquisitions and affiliations. Panelists include practitioners in the finance and legal professions as well as representatives from schools. The discussion will provide attendees a framework for navigating the complexities of this developing aspect of strategic planning and managing institutional and financial sustainability.

Sponsor: **STIFEL**

## Mission, Margin, Markets - Rapid Deployment of Integrated Analysis to Improve Program Revenues and Save Costs

Harborside Ballroom B

Carrie Birckbichler, *Slippery Rock University*

H. Daniel Hungerford, *St. Bonaventure University*

Molly Mercer, *Slippery Rock University*

Nick Wallace, *BKD CPAs and Advisors*

Tried the faculty circular firing squad to “prioritize academic programs”? It was painful, long and did not produce what was promised, right? This session will discuss tools and processes to rapidly deploy analytics to enable assessment of financial margins for academic programs and markets for existing and future programs. We will show how this is all done in the context of the institutional mission. We will demonstrate tool capability and discuss proven processes to save money and produce additional program revenues. The program will include a live demonstration of the tools and prioritize time for discussion of real-life examples where deployment of these tools is in place.



Tuesday, October 15

6:00 PM - 9:00 PM

## Networking Reception at the B&O Railway Museum

Located among Baltimore City's historic southwest neighborhoods, at the original site of the historic Mt. Clare Shops, the B&O Railroad Museum is recognized universally as the birthplace of American railroading. Undoubtedly the most spectacular and best known of the Museum's buildings is the Roundhouse which contains exhibits and the most significant collection of 19th century railroad equipment in the world. The turntable is functional and used to demonstrate how railcars were turned when the building was in use.

It is here that EACUBO continues its Centennial celebration during the Networking Reception. Join your colleagues and new friends at this very special location.

Transportation: Look for the signs. Buses will pick up and drop off at the side of the Baltimore Marriott Waterfront - by the Columbus Way entrance beginning at 5:45 PM and will continuously loop.

The last bus will leave the hotel at 8:00 PM. The final bus will leave the B&O Railway Museum at 9:00 PM.

Sponsors: **KOYA** | **LEADERSHIP PARTNERS** | 

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**WT**  
WHITING-TURNER

 **workday.**

# Wednesday, October 16

7:30 AM - 11:30 AM

Registration Open

Harborside Registration

7:30 AM - 8:15 AM

Networking Breakfast

Harborside Ballroom Foyer

Sponsor:



[salesforce.org](http://salesforce.org)

8:15 AM - 9:00 AM

EACUBO Annual Business Meeting

Harborside Ballroom C-E

9:00 AM - 10:00 AM

General Session: The Next 20 Years - Promises and Challenges of Higher Education

Harborside Ballroom C-E

Michio Kaku



Dr. Michio Kaku is one of the most widely recognized figures in science in the world today. He is an internationally recognized authority in two areas. The first is Einstein's unified field theory, which Dr. Kaku is attempting to complete. The other is to predict trends affecting business, medicine, finance, and our way of life, based on the latest research in science. He has written four NY Times Best Sellers. His latest is the Future of Humanity, which projects the future of the space program decades to centuries into the future. His previous best seller, The Future of the Mind, hit #1 on the NY Times, Amazon, and Barnes and Noble Best Sellers List, making it the #1 hardcover, non-fiction book in the country. He appears regularly on national and international TV and hosts numerous science TV and radio programs.

Dr. Kaku holds the Henry Semat Chair in Theoretical Physics at the City University of New York. He graduated from Harvard University in 1968 (summa cum laude and 1st in his physics class). He received his Ph.D. in physics from the University of California at Berkeley in 1972 and been a professor at CUNY for almost 30 years. He has taught at Harvard and Princeton, as well. His goal is the complete Einstein's dream of a "theory of everything," to derive an equation, perhaps no more than one inch long, which will summarize all the physical laws of the universe. He is the co-founder of string theory, a major branch of string theory, which is the leading candidate today for the theory of everything. His Ph.D. level textbooks are required reading at many of the world's leading physics laboratories.

He is the author of several international best-sellers. Besides The Future of Humanity and The Future of the Mind, his other New York Times best-

Wednesday, October 16

sellers include. Physics of the Future, and Physics of the Impossible. Other books include Hyperspace and Visions: How Science Will Revolutionize the 21st Century. For Physics of the Future, he interviewed 300 of the world's top scientists, many of them Nobel Laureates and directors of the largest scientific laboratories, about their vision for the next 20 to 100 years in computers, robotics, biotechnology, space travel, etc. These are the scientists who are inventing the future in their laboratories. The Physics of the Future gives the most authoritative and most authentic understanding of the world of the future. Physics of the Future was also chosen by Amazon as one of the Top 100 Books of 2011.

His book, Parallel Worlds, about the latest in cosmology, which was a finalist for the prestigious Samuel Johnson Prize for Non-Fiction in the UK, and a finalist for the Aventist science book award.

His other NY Times best seller, Physics of the Impossible, earned glowing reviews from the LA Times, New Scientist Magazine, Guardian Newspaper (UK) and many, many more. It was also the number one science book in the United States.

His best seller The Future of the Mind details the stunning breakthroughs being made in neuroscience, which are finally beginning to unravel the mysteries of the most complex object in the known universe, the human brain. Recent scientific advances in brain-machine interface have made possible a form of telepathy, telekinesis, recording and uploading memories, and even photographing thoughts.

Sponsor:



10:15 AM - 11:15 AM

## Concurrent Sessions

### Can "AI" be "Administrative Intelligence"?

Harborside Ballroom B

Michael Ciprian, *University of Massachusetts Lowell*

Peter Coffee, *Salesforce*

Affordable and accessible machine intelligence is no longer just the futuristic "AI" of Hollywood: it is increasingly the everyday power of pattern recognition, prediction and planning that can create a more efficient academy while also delivering a more individually optimized student experience. Peter Coffee brings the global perspective of Salesforce Strategic Research to provide a brief review of absolutely predictable, massively disruptive changes that are happening in plain sight and that demonstrate author William Gibson's 1990s comment that "The future is already here. It's just not very evenly distributed." He will also offer practical, immediately usable strategies to address the resulting opportunities as well as challenges and will then go deeper in a fireside chat with Michael Cipriano, Associate Vice Chancellor for Information Technology & CIO at UMass Lowell.

Wednesday, October 16

## Board Needs of the Future

Essex

**Mady Deininger**, *Stockton University, retired*

**David Maxwell**, *Drake University, retired*

The roles and responsibilities of governing boards of colleges, universities and systems have become increasingly complex, as boards are called upon not only to exercise their traditional fiduciary responsibilities, but to serve as strategic partners with administrative and faculty leadership to ensure that the institution has a clear path to the future, that it is vibrant, vital, relevant and faithful to its mission.

To carry out this multi-faceted role, boards must rely both on a set of partnerships governed by agreed-upon principles, and on accurate, complete and comprehensible information. Mady Deininger, former chair of the Board of Trustees of Stockton University in New Jersey, and David Maxwell, president emeritus of Drake University and chair of the Board of Trustees of Grinnell College, will engage the audience in a discussion of the evolving needs of boards in order to continue serving their institutions at the highest level.

## Leadership in the New Century

Harborside Ballroom A

**Mark Saine**, *TIAA*

As EACUBO celebrates its 100th anniversary, it is also time to consider what great leadership looks like in the future. We are at the dawn of numerous technological and social changes, and this means we need to take a fresh look at the way leaders lead. This session will explore key leadership skills that we will need to grow to effectively meet the challenges of the future, and we'll discover some ways to grow into the leader that new times demand. Session participants will engage in several one-on-one and small group conversations.



**ODGERS BERNDTSON**

## Leading Indicators for College and Universities

Laurel

**Donald Resnick**, *The New School*

**Joseph Bosch**, *D.A. Davidson & Co.*

**Daniel Froehlich**, *D.A. Davidson & Co.*

**Michael Imber**, *Eisner Amper, LLP*

Private colleges and universities in the northeastern United States face a number of challenges, including demographics and enrollment, operating expenses, deferred maintenance and capital reinvestment and the regulatory environment. Our belief is that colleges that are proactive and strategic can overcome these challenges. Our panel will discuss "Leading Indicators" of future financial trouble and strategies to avoid it.

11:15 AM - 11:30 AM

## Break

Harborside Ballroom Foyer

11:30 AM - 12:30 PM

## Concurrent Sessions

### Growing Challenges in Ethics

Essex

**Tim Fournier**, *Rutgers, The State University of New Jersey*

**Kim Fearney**, *University of Connecticut*

**Maurice Crescenzo**, *FTI Consulting*

During the last twenty years, ethical scandals have rocked industries as diverse as manufacturing, banking and financial services, and NGOs. From Enron to Tyco to Volkswagen to Bernie Madoff to the Livestrong Foundation to Facebook, these scandals have undermined public trust in individuals, in organizations, and in large segments of our national identity. Higher education has not been immune. And our institutions embody elements of every sector of American society – cultural, demographic, financial, economic – perhaps setting higher education on a pillar in the public's mind that is beginning to crumble from the weight of our own ethical lapses.

Our panel will explore the growing ethical challenges in research, academics, athletics, conflicts of interest, and other aspects of our world to remind us of the importance of ethical decision-making in maintaining public confidence in our institutions for the long-term, to help us prepare our graduates for the workplace, to create new knowledge and practice to improve the world, and to be better guardians of the public trust.

### Promoting and Developing Flexible Staffing Skillsets

Harborside Ballroom B

**Lynne Schaefer**, *University of Maryland Baltimore County*

**Catherine Lilly**, *Sibson*

An institution's workforce is perhaps the largest and most expensive tool that can be leveraged toward achieving its goals for the future. Yet, many campuses have not formulated a change plan to be ready for the type of workforce that will be here in just a few years. What is the state of your institutional readiness? Join us for a description of what the future state workforce will look like and the implications for campuses. We will discuss how staffing projections are no longer enough and how workforce planning is the trending solution. Sibson Consulting will cover the "what" and "how" of workforce planning and dive into detailed programming that institutions are doing now to build flexibility in their workforce. Presenters will draw on case studies from across industries to share planning considerations, lessons learned, and what to expect as you make changes to prepare.



Wednesday, October 16

## Revenue Diversification Opportunities

Laurel

Nancy Byron, *University of Georgia*

Fox Troilo, *Hanover Research*

This session highlights several real-world examples of how a higher education institution (University of Georgia) leveraged data to determine the viability and feasibility of new academic programs, particularly in the online space. People who attend this conversation will learn how to employ a mix of research methodologies and data sources in order to identify opportunities to optimize their program portfolio, thus opening the potential for growth and revenue diversification.

## Robots on Campus: The Continuing Evolution of the Retail Dining Experience

Harborside Ballroom A

Mark Kraner, *George Mason University*

Jeff McKinley, *Sodexo Universities*

Today's students understand the benefits of technology and expect it to be integrated into campus life. Universities are introducing new technologies and strategies to meet this generation's elevated expectations of quality and efficiency. Spring semester 2019 that came in the form of a fleet of small, six-wheeled robotic pods capable of carrying 25 pounds, traveling at top speeds of nearly four miles per hour delivering food all over campus at George Mason University in Fairfax, VA. Learn how across the country delivery robots are now meeting students' elevated expectations of convenience and efficiency, enhanced engagement, improved satisfaction, and increased revenue while serving as both a differentiator and a fun part of campus life.

## Exhibit Hall Schedule

Make sure you visit the Exhibit Hall during the hours below to connect with your current service vendors, cultivate and develop new relationships with EACUBO's corporate partners, search for solutions to current challenges, and perhaps select your next service provider. More than 75 companies are looking forward to meeting you.

You will also be given the opportunity to win great prizes! Exhibitors will give you a ticket when you visit their booths. Write your name on the back of each ticket and drop it into the prize-drawing box located in the back of aisle 600 aisle in the Exhibit Hall. Be sure to stop by all the exhibitor booths, as the more tickets you receive, the more chances you have to win!

Attendees must be present to win. Each prize-drawing time slot listed below will offer the chance to win a \$50 gift card.





## Monday, October 14

7:30 - 9:00 AM

Networking Breakfast (Prize Drawing)

1:30 - 3:00 PM

Dessert with Micro Sessions (Prize Drawing)

### Micro Sessions

1:30 PM

#### HelioCampus

Join HelioCampus for a brief presentation and learn about how we are helping colleges and universities use analytics to increase enrollment, improve student success, ensure financial sustainability and accelerate gift giving. In this session, we'll share more about our model and approach, as well as provide an overview of how we are working with other EACUBO members Frostburg State University, University of Maryland, Baltimore and the University of Delaware.

2:00 PM

#### The Fulcrum Group

Specializing in complex infrastructure and building systems, the Fulcrum Group is the owner's trusted advisor for high-level planning and implementation strategies that maximize long-term capital investments in facilities and operations. Fulcrum's Nick Lewandowski will discuss some of the most prevalent challenges in energy and infrastructure facing College and University campuses today, and will describe how Fulcrum has helped many clients, including and most recently, American University, transform their aging, costly, carbon-intensive district heating systems into highly efficient and environmentally friendly hydronic systems that pay for themselves in record time.

2:30 PM

#### truED Consulting

The Digital Transformation of the University Finance Office: How have peer institutions like NYU, SNHU, UVA, Auburn and Seton Hall been able to change the way they think about planning? Join Brian Mehr of truED consulting and Steve Lott of Anaplan as they discuss how finance teams are significantly improving their ability to support the organization while at the same time digitally transforming financial planning and analysis in higher education.

5:15 - 6:15 PM

Happy Hour



## Tuesday, October 15

7:30 - 8:30 AM

Networking Breakfast (Prize Drawing)

1:30 - 3:30 PM

Ice Cream Social and Micro Sessions  
(Prize Drawing)

### Micro Sessions

1:45 PM

#### **NJM Insurance Group**

Workers' Compensation - Controlling Costs with an Effective Loss Prevention Program: Discussion material will outline the elements of a loss prevention program

2:15 PM

#### **Pearson**

Pearson is a global company working to partner with institutions to remove distractions from the learning process. During this micro session, Pearson will be talking about a new distribution and billing model for students' course materials called "Inclusive Access" that many institutions are starting to adopt. Come learn more about Inclusive Access and see how this innovative model can help you accomplish more affordable course materials, accessibility to student materials on day one of classes, faster transition to digital, improved achievement and or outcomes for students, and new revenue streams for the university.

2:45 PM

#### **Teibel Education Consulting**

Teibel Education offers team-building programs, a powerful leadership development series and services to produce genuine collaboration across administrative and academic divisions. In the micro session, Howard Teibel will discuss how to use language to cultivate personal power and team effectiveness and what it takes to bring emotional resiliency and boldness to our work. Teibel's clients include Rutgers University, the University of Colorado campuses, Princeton University and many others. Howard also produces the 10-year running education podcast *Navigating Change*.

## Exhibitors Listing

Company	Booth
ABM	214
AE7 Architects & Planners	514
Aladdin	702
Allianz Global Assistance	301
American Dining Creations	605
Anaplan	703
Apogee	201
ARAMARK	305
Arthur J Gallagher	414
Bank/Mobile	715
Barnes & Noble College	517
BKD CPAs & Advisors	205
BlackLine	502
BlackRock	204
Breckinridge Capital Advisors	503
Brown Advisory	500
Campus Labs	600
C&S Engineers, Inc.	700
Calpine Energy Solutions	612
CBIZ, Inc.	603
CFI Group	416
Chartwells Higher Education Dining Services	200
CMD Outsourcing Solutions	216
Coalition for College Cost Savings	401
CSI International, Inc.	714
CulinArt Group	312
Dude Solutions	203
Ellucian	717
Fiduciary Investment Advisors (FIA)	315
Financial Aid Services	515
Fitch Ratings	101
Follett Higher Education Group, Inc.	103
Gourmet Dining LLC	215
Grant Thornton LLP	412
Graystone Consulting	417

## Exhibitors Listing

Company	Booth
Jenzabar, Inc.	400
Johnson Controls	105
Kaufman Hall	302
KeyBanc Capital Markets	304
M&T Bank	117
Marcum LLP	213
Metz Culinary Management	415
Nelnet Campus Commerce	712
Noelker and Hull Associates, Inc.	113
Oracle	100
Parkhurst Dining	114
PFM Solutions LLC	504
PKF O'Connor Davies, LLP	501
PNC Institutional Asset Management	601
Porter Khouw Consulting, Inc.	512
QTrak	716
Records Consultants, Inc.	212
RTI	316
S&P Global Ratings	317
SAP Concur	404
Sentinel Benefits & Financial Group	202
Sibson Consulting	313
Sightlines, a Gordian Company	505
Sodexo	616
SSC Services for Education	314
The Stone House Group	115
SunTrust Bank	402
TIAA	300
TouchNet	513
Tourisme Montreal	Foyer
Transact Payments powered by Cashnet	303
Trimdata	516
truEd Consulting	701



## Exhibitors Listing

Company	Booth
Unimarket	704
Upside Business Travel	615
US Bank	602
Vemo Education	613
Warfel Construction Company	116
Workiva	614
XLerant, Inc.	604
Ziegler	413



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**#EACUBOAM**



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EACUBO

2020 Annual Meeting



October 16-20, 2020 | Montréal, Canada



# EACUBO

## 2020 Workshop



March 11-13, 2020 | Philadelphia, PA