

# EACUBO 2017 WORKSHOP

**PREPARATION.**

**PARTNERSHIP.**

**PERFORMANCE.**



**March 8–10**  
**Loews Philadelphia Hotel**

### **Wednesday, March 8**

7:30–8:30 a.m.	Next Generation Chief Business Officer Session Registration and Breakfast
8:30 a.m.–5 p.m.	Next Generation Chief Business Officer Session
2–5 p.m.	Early Registration for Workshop Attendees

### **Thursday, March 9**

7:30 a.m.–4 p.m.	Registration
7:30–8:30 a.m.	Networking Breakfast
8:30–9:45 a.m.	General Session I
9:45–10:15 a.m.	Refreshment Break
10:15–11:30 a.m.	Concurrent Sessions I
11:30 a.m.–1 p.m.	Lunch With Speaker
1–2:15 p.m.	Concurrent Sessions II
2:15–2:45 p.m.	Refreshment Break
2:45–4 p.m.	Concurrent Sessions III
4–5:30 p.m.	Networking Reception

### **Friday, March 10**

7:30 a.m.–1 p.m.	Registration
7:30–8:30 a.m.	Networking Breakfast
8:30–9:45 a.m.	General Session II
10–11:15 a.m.	Concurrent Sessions IV
11:15–11:45 a.m.	Refreshment and Checkout Break
11:45 a.m.–1 p.m.	Concurrent Sessions V

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# Welcome

March 8, 2017

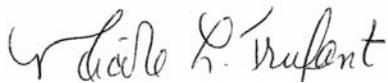
Dear Colleagues:

It is my pleasure to welcome you to the EACUBO 2017 Workshop—“Preparation. Partnership. Performance.”—in Philadelphia. On behalf of our volunteer Program and 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 that you can take a deeper dive into specific tracks—plan out specific areas you would like to focus on or learn a little from each track. And we have used your feedback 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. John Fry, president of Drexel University, will discuss his entrepreneurial approach by reducing student acceptances and raising retention rates. You will also hear from Corey Ciocchetti who will encourage you to chase the truly important things in life such as a solid character, strong personal relationships, and a sense of contentment.

Networking is a key benefit of your EACUBO membership, 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 Philadelphia without having made a few new professional contacts and catching up with old friends. With more than 20 sessions that appeal to all audiences, you will not only earn valuable educational credits, but you will also leave this workshop 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*

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# EACUBO: Leading Through Uncertainty and Change

With inevitable change and uncertainty occurring throughout the higher education landscape, a community of knowledge, support and good ideas is more important than ever. EACUBO, and its mission to prepare and support financial and administrative leaders as pivotal strategic partners who enable their academic institutions to thrive—can fill that role.

EACUBO board members and scores of committee volunteers continue to design and implement events, programs, and services that focus on three key areas:

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

As colleagues, we are EACUBO and by working together, we will get the most out of what the EACUBO 2017 Workshop has to offer:

- Strategic thinking and technical information needed to address campus needs and support 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 engagement brings rewards—personally, professionally, and for our EACUBO community. Please consider the following:

- Encourage your campus colleagues to participate in EACUBO activities. Our workshops 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. Together as EACUBO members, we can and will transform the performance of higher education.**

# EACUBO 2017 Workshop Sponsors

## By Level

### GOLD

Sibson Consulting

TIAA

### SILVER

Aramark

J.P. Morgan

PNC

CohnReznick

Neumann

PwC

Grant Thornton LLP

PFM

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Ricoh

### BRONZE

BakerTilly

KPMG LLP

Sentinel Benefits & Financial Group

GK Baum

Huron

## By Event

### SPONSOR

### EVENT/ITEM

Aramark

Networking Reception Bar

Baker Tilly

Thursday Morning Break

Barnes & Noble

Meeting App Alert

CBIZ

Concurrent Session

CohnReznick

General Session I

Grant Thornton LLP

Name Badge Lanyard

GK Baum

Concurrent Sessions (3)

Huron

Networking Reception Bar

J.P. Morgan

General Session II

KPMG LLP

Friday Morning Break

Neumann

Concurrent Session and Networking Reception Bar

PFM

Networking Reception

PNC

Thursday Lunch

PwC

Thursday Breakfast

Ricoh

Internet Café

RSM

Wireless Internet

Sentinel Benefits & Financial Group

Thursday Afternoon Break

Sibson Consulting

Networking Reception

TIAA

Meeting App and Next Generation Chief Business Officer Program

# Download the EACUBO 2017 Workshop Mobile App!

Navigate the event like a pro with the EACUBO 2017 Workshop mobile app, powered by core-apps.com.

With the 2017 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
- 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.** In the Apple app store or Google Play store, search for “EACUBO” and download.

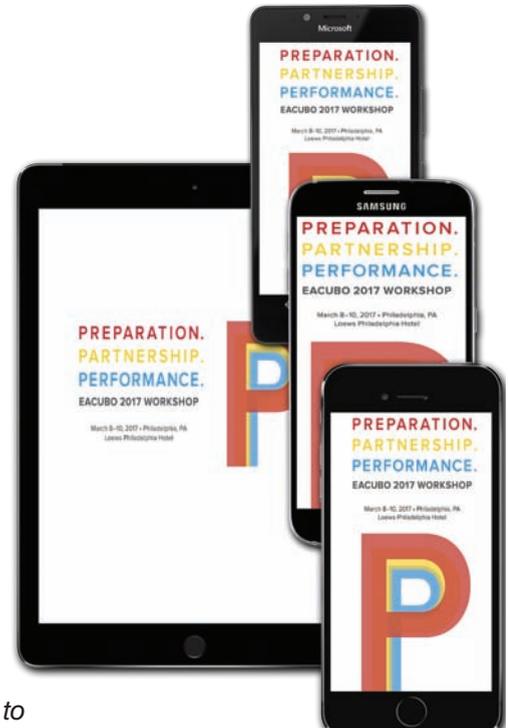
Once you have downloaded and opened the app, choose the EACUBO 2017 Workshop and tap “Download.”

*If you already have the EACUBO mobile app from previous years, simply go to settings and tap “Exit to Show List.” Choose the EACUBO 2017 Workshop and tap “Download.”*

**2. 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/ecubo17w](http://l.core-apps.com/ecubo17w) to be directed to the proper download version for your phone.

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



# Wireless Internet Access Instructions

To access wireless Internet:

1. Select wireless network: "RSM Network."
2. Enter network key to connect online: rsmus123 (code is case sensitive).
3. Open Internet browser.
4. Wait for the Loews home page to open. Begin browsing.

Sponsor:  RSM

## Internet Café

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

Sponsor:  RICOH  
imagine. change.



# Continuing Professional Education (CPE)

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 (NASBA) and the American Institute of Certified Public Accountants (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 10 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 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 EACUBO 2017 Workshop will award participants up to 10.5 CPEs in the form of group live presentation. An additional seven CPEs can be earned by attending the Next Generation Chief Business Officer preconference. Participation in the mentoring program offers an additional three 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 Romaine Botti, EACUBO CPE contact at [rbotti@cit.cmu.edu](mailto:rbotti@cit.cmu.edu).

# EACUBO Mentoring Program

The EACUBO Mentoring Program is by INVITATION ONLY. If you wish to get involved, please contact Jenni Sauer at: [jenni.sauer@delval.edu](mailto:jenni.sauer@delval.edu).

**Mentoring Partnership Closing Session (Cohort 5)**  
**Wednesday, March 8, 4–5:30 p.m.**

**Room: Jefferson**

This is the third formal face-to-face session and concludes the yearlong mentoring program for the 2016–17 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, 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.

## Career Counseling

EACUBO, in partnership with ClearRock—a leadership development and career coaching firm—will be offering a limited number of one-on-one meetings with Laura Poisson, the firm’s president, on Thursday afternoon and Friday morning. If you did not reserve your spot already, head to the EACUBO registration desk to see if there are openings.

## Leading Higher Education's Integration of Analytics to Achieve Institutional Strategic Goals

This session is a two-hour small-group discussion to consider the direction of analytics in our work.

**Thursday, March 9, 5:30–7 p.m.**

**Room: Congress Room A**

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

*Facilitators:*

**Mike Gower**, *Executive Vice President for Finance & Administration, Rutgers University, Past Chair, EACUBO & Chair, NACUBO's Ad Hoc Committee on Identifying and Disseminating Effective Analytics*

**Mitch Wein**, *Senior Vice President for Finance & Chief Administrative Officer, Haverford College, Vice Chair, EACUBO & Member, NACUBO's Ad Hoc Committee on Identifying and Disseminating Effective Analytics*

Higher education business officers are facing unprecedented challenges in supporting the missions and strategic goals of their institutions. Now, more than ever, it is essential to have robust business intelligence and analytics to inform decisions. While many institutions and business partners are developing useful analytics and business intelligence tools, without a common, coordinated effort for analytics, comparability and reliability are compromised. NACUBO, with support from EACUBO and the other regions, is leading an effort to develop a common understanding and framework for use of analytics to achieve institutional strategic priorities. During this session, participants will discuss the importance of managerial and analytical information to the higher education industry. Members of the NACUBO Analytics Committee will provide a national perspective on the use of analytics, current research findings, best-practice examples, and underlying principles. The discussion and small-group work in this session will help inform and provide direction for this strategic NACUBO initiative.

*Learning Objectives:*

- Participants will understand the importance of integrating managerial and analytical information to achieve institutional strategic goals.
- Participants will be informed of the research that has been done, and the research that is underway, to provide direction for further integration of analytics in higher education.
- Participants will examine model practices being developed at other institutions and identify how these can be used to develop or modify analytics efforts at their institutions.

# EACUBO 2017 Workshop Track Descriptions

The EACUBO 2017 Workshop offers 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.

## Leadership and Talent Management

EACUBO defines leadership as more of a mindset than a role or title. Attendees of these sessions will learn from leaders and colleagues about career and succession planning, team building, and career transition management. These sessions will help attendees foster strategic thinking, create opportunities, and generate solutions.

## 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 public-private partnership opportunities.

## Technical Fundamentals

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

## Academic and Unit Business Officer **NEW**

This new track for academic and administrative unit business officers will focus on topics of interest that are unique to business managers of major segments of the university who work with but may not report through the institution's chief business officer. Examples include college and program administrators, athletics business managers, and other operational unit business managers.

# Wednesday, March 8

**7:30–8:30 a.m.**      **Next Generation Chief Business Officer Session  
Registration and Breakfast**      Room: *Congress Hall Prefunction*

**8:30 a.m.–5 p.m.**      **Next Generation Chief Business Officer Session**      Room: *Congress Hall*  
**Larry Goldstein, Campus Strategies, LLC**

This session will review the state of leadership in higher education, including the CBO's role, the future timeline for those in higher education, and career mapping. This session is tailored for non-CBO senior staff in the finance/business division of colleges and universities.

The full-day session will help attendees better understand the many complex hats that a higher education CBO must wear each day, and includes the following key takeaways:

- Develop strategic-thinking skills, including getting beyond the day-to-day operational challenges encountered in a higher education institution setting.
- Find comfort and appropriately deal with the level of ambiguity that exists in today's complex organizations.
- Explore the range of issues confronting CBOs in academic settings.
- Understand how to use multifaceted and complementary solutions to deal with complex ethical issues.
- Examine the leadership operating style and its implications for the strategic challenges confronting institutions.

Sponsor:



**2–5 p.m.**      **Early Registration for Workshop Attendees**      Room: *Millennium Hall Prefunction*

7:30 a.m.–4 p.m.

## Registration

Room: *Millennium Hall Prefunction*

7:30–8:30 a.m.

## Networking Breakfast

Room: *Millennium Hall Prefunction*

Sponsor:



8:30–9:45 a.m.

## Transforming the Modern Urban University and Its City

Room: *Millennium Hall*

**John Fry**, *Drexel University*

University President Fry will discuss how Drexel University views its role as an anchor institution and economic engine in Philadelphia as inseparable from the university's mission to build a learning environment that serves students and society through outstanding academics, innovative technology, and experiential learning.

Sponsor: **COHN REZNICK**  
ACCOUNTING • TAX • ADVISORY

9:45–10:15 a.m.

## Refreshment Break

Room: *Millennium Hall Prefunction*

Sponsor:



Accountants and Advisors

10:15–11:30 a.m.

## CONCURRENT SESSIONS

### LEADERSHIP & TALENT MANAGEMENT

#### **Amplify Your Leadership to Drive Your Business Forward**

Room: *Commonwealth A*

**Vincent Phipps**, *Communication VIP Training and Coaching*

Instead of treating others the way you want to be treated; treat others the way they want to be treated. Based on continual studies dating back more than 2,000 years, this innovative approach to leadership training combines historical data with today's ever-changing professional culture. The technique is called L.E.A.D., and each letter represents one of the four leadership communication styles:

- Laid-back and low key
- Energetic and emotional
- Accurate and analytical
- Direct and dominant

Chief Financial Officers and Chief Academic Officers are increasingly called upon to collaborate to support student success while also creating a sustainable business model. An academic portfolio review is a primary example of this collaboration. This session will demonstrate proven tools and approaches for linking demand, yield, and margin when analyzing academic portfolios. Phipps will share examples of analysis to understand academic efficiency and productivity, and highlight the change management process through case studies.

10:15–11:30 a.m.

## CONCURRENT SESSIONS (continued)

FINANCIAL SUSTAINABILITY

### Applying Data Analytics to Business

Room: *Commonwealth B*

**John Coppola**, *Loyola University Maryland*

**Amy Wolfson**, *Loyola University Maryland*

**Richard Staisloff**, *rpk GROUP*

This session will explore options available, techniques, errors made, successes, and conclusions reached in implementing enterprise risk management programs at Loyola University Maryland 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, attendees will learn how to involve and gain the support of senior leaders, audit committees, and governing boards.

TECHNICAL FUNDAMENTALS

### Top Lessons Learned From the First Year of the New Single-Audit Requirement

Room: *Commonwealth C*

**Jeffrey Conrad**, *Fisher College*

**Michelle Spriggs**, *CBIZ Tofias*

Last year was the first year of the new single-audit requirements in Subpart F of the Uniform Grant Guidance (Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards). With these requirements came numerous changes in the planning, executing, and final reporting phases of a single audit that affect both organizations and auditors. This session will focus on lessons learned from the first year of the new requirements. The speakers will explore planning, executing, and final single-audit reporting best-practice tips to help institutions and auditors prepare for an effective and efficient audit process. The speakers will also discuss key changes in other parts of the Uniform Grant Guidance on administrative requirements and cost principles.

Sponsor:



## Thursday, March 9 (continued)

10:15–11:30 a.m.

### CONCURRENT SESSIONS (continued)

ACADEMIC & UNIT BUSINESS OFFICER

#### **Creating a High-Performing Relationship Between the CBO and Unit Business Officers: Improving the Budget Process**

Room: *Commonwealth D*

**Patrick Donohue**, *Scranton University*

**Ray Schwenk**, *Scranton University*

**Ed Steinmetz**, *Scranton University*

Case Study: How the CBO and unit business officers worked together to improve the resource allocation process at the University of Scranton. The presenters will discuss key examples and case studies of strategies that institutions should follow now to protect against cyber threats.

11:30 a.m.–1 p.m.

#### **Lunch and EACUBO Update Higher Education in an Evolving Landscape**

Room: *Millennium Hall*

**Kim Benston**, *Haverford College*

As the rules of the road are dynamic and may be changing, certain risks confronting academic institutions are being observed. New thinking may be needed to analyze such changes and to respond appropriately. Although many risks encompass financial considerations, these developments may also be quite varied in their tenor. As the President of Haverford College, Kim Benston will offer a brief overview of how he views some of these developing risks that may be emanating from the current and evolving landscape.

Sponsor:  **PNC**

# Thursday, March 9 (continued)

1–2:15 p.m.

## CONCURRENT SESSIONS

### LEADERSHIP & TALENT MANAGEMENT

#### **Collaborative Budget Planning to Enhance Shared Governance**

Room: *Commonwealth A*

**Carolyn Ainslie**, *Princeton University*

**Karen Goldstein**, *Consultant*

**Sherry Mondou**, *University of Puget Sound*

College and university leaders are facing difficult challenges from both inside and outside their institutions. Institutional costs are rising, while sources of revenue are not. Faculty are concerned about what they perceive as the erosion of shared governance in the face of financial and organizational challenges. Trustees want to be assured that their institution is running efficiently and effectively. Many stakeholders, both inside and outside higher education institutions, are demanding a new business model to help their institution survive and thrive. The speakers will describe and share successful models of collaborative budget planning as one element in building shared trust and financial responsibility across the institution to respond successfully to today's challenges.

Sponsor: **neumann**  
Executive Search Partners

1–2:15 p.m.

## CONCURRENT SESSIONS (continued)

FINANCIAL SUSTAINABILITY

### **It Pays to Be Green: Colleges and Universities Pursue Sustainability to Reduce Costs and Remain Competitive**

Room: *Commonwealth B*

**Joseph Doncsecz**, *Pennsylvania State University*

**Robert Francis**, *Drexel University*

**Steve Maruszewski**, *Pennsylvania State University*

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

Higher education institutions are facing increasingly complex issues, with environmental challenges rising to the top of the list. However, the resources to address these issues are becoming increasingly scarce. The inaction or inability to comprehensively incorporate sustainability efforts into strategic and capital plans may result in deterioration in competitive positioning over the long term. This session will include examples of how two universities prioritize, promote, and pay for sustainability initiatives. It will also include Moody's Investors Service's perspective on how environmental factors are reflected in its credit analysis for colleges and universities.

TECHNICAL FUNDAMENTALS

### **Accounting and Auditing Update**

Room: *Commonwealth C*

**Dennis Morrone**, *Grant Thornton*

**Brian Page**, *Grant Thornton*

The higher education community is impacted annually by changes in accounting and audit rules. Institutions must be increasingly proactive in identifying areas where potential accounting issues are most likely to occur. This session will help keep your institution current with technical updates from the FASB/GASB including discussions of the revenue recognition, lease, and not-for-profit financial presentation standards. The speakers will describe the technical requirements of these new standards and share practical implementation guidance and examples to help assist member institutions in managing the increasing number of new standards.

# Thursday, March 9 (continued)

1–2:15 p.m.

## CONCURRENT SESSIONS (continued)

ACADEMIC & UNIT BUSINESS OFFICER

### Challenges Unique to Unit Business Officers

Room: *Commonwealth D*

**Romayne Botti**, *Carnegie Mellon University* (Moderator)

Panelists:

**Mary Glasscock**, *Georgetown University*

**Rich Kelley**, *Merrimack College*

**Linda Lee**, *Drexel University*

This session offers a panel discussion around four issues unique to unit business offices: 1) Working with departmental business managers who don't have financial backgrounds; 2) Coordinating with central finance regarding calendars, communications and information sharing; 3) Financial impacts related to faculty (start-up packages, retention, leaves, etc.); and 4) Revenue sharing in auxiliaries.

2:15–2:45 p.m.

### Refreshment Break

Room: *Millennium Hall Prefunction*

Sponsor:  Sentinel Benefits  
& FINANCIAL GROUP

2:45–4 p.m.

## CONCURRENT SESSIONS

LEADERSHIP & TALENT MANAGEMENT

### Leading Change

Room: *Commonwealth A*

**Mark Saine**, *TIAA*

Most efforts to change an institution or function fail or, at best, achieve only minimal results. Given the effort and investment in these changes, it is important to understand how to make change efforts more effective. While much effort is put into the tactical aspects of implementing a change, often little effort is put into the role of leading transitions. This session will look at the leadership responsibilities throughout a change effort, and how greater leadership effectiveness can lead to more change success.

2:45–4 p.m.

## CONCURRENT SESSIONS (continued)

### FINANCIAL SUSTAINABILITY

#### **How Procurement Initiatives Can Help the Bottom Line** Room: *Commonwealth B*

**Ron Moraski**, *Rensselaer Polytechnic Institute*

**Jeanie Ralston**, *E&I Cooperative Services*

Rensselaer Polytechnic Institute (RPI) has implemented a number of strategic procurement initiatives that have paid off handsomely and allowed RPI to continue to implement cost-saving strategies. eProcurement has provided a basis for consolidated spending habits and an enhanced campus experience. The ability to operate without a p-card demonstrates that institutions can operate with fewer p-cards on campus, reducing possible fraud exposure while enabling true strategic sourcing. The use of the reverse auction process for the procurement of various commodities, including bus leases and electricity, has yielded significant savings. The buyer-initiated payments tool has helped automate payments, eliminate checks, enhance security, and extend float. Using spend analysis procedures and processes to better understand institutional spending trends and make strategic decisions based on these results, RPI has been able to maximize its institutional funds. This presentation will share processes RPI employed, lessons learned, and results achieved.

### TECHNICAL FUNDAMENTALS

#### **Business Officers in the Know— Top Tax Issues in 2017**

Room: *Commonwealth C*

**MaryAnn Piccolo**, *University of Pennsylvania*

**John Sanchez**, *Tufts University*

**Gwen Spencer**, *PwC*

What are the key tax risks for colleges and universities today? Which legislative proposals should you be tracking? This session will highlight key considerations for business officers as you strive to focus on tax matters that affect your organization most. The speakers will also cover the focus of Congress and the IRS on tax and colleges and universities.

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2:45–4 p.m.

## CONCURRENT SESSIONS (continued)

ACADEMIC & UNIT BUSINESS OFFICER

### Creating a High Performing Relationship Between the CBO and Unit Business Officers: Collaboration—What It Might Look Like Room: Commonwealth D

**G. Timothy Bowman**, *Harvard John A. Paulson School of Engineering and Applied Sciences*

**Jonathan Paul**, *Harvard University*

A major challenge of an “every tub on its own bottom” resource-allocation model is the high degree of complexity involved in creating, coordinating, planning, and funding shared university-wide strategic priorities. The decision to expand Harvard’s School of Engineering and Applied Sciences (SEAS) has accentuated this challenge and has required enhanced collaboration between SEAS and the university’s Office for Financial Strategy & Planning (OFSP). This presentation will look at how SEAS and OFSP have done this—what has worked and not worked, and how it has improved the financial planning and collaboration between the center and the school.

4–5:30 p.m.

## Networking Reception

Room: Millennium Hall

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7:30 a.m.–1 p.m.

**Registration**

Room: *Millennium Hall Prefunction*

7:30–8:30 a.m.

**Networking Breakfast**

Room: *Millennium Hall Prefunction*

8:30–9:45 a.m.

**Inspire Integrity: Chase an Authentic Life**

Room: *Millennium Hall*

**Corey Ciocchetti**, *University of Denver and Corey Speaks*

Ciocchetti will discuss chasing the truly important things in life such as a solid character, strong personal relationships, and a sense of contentment. These “real rabbits” will be compared and contrasted to worldly success such as excessive wealth, popularity, and prestige. Audience members will leave with a better sense of what it takes to develop character, set priorities, gain a big-picture perspective, and chase an authentic life.

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10–11:15 a.m.

## CONCURRENT SESSIONS

LEADERSHIP & TALENT MANAGEMENT

**Workplace Bullying:  
A Threat to Organizational Sustainability**

Room: *Commonwealth A*

**Michael Williams**, *Thomas Edison State University*

**Joseph Youngblood**, *Thomas Edison State University*

Workplace bullying has emerged as a threat to organizational growth and sustainability in higher education. It is estimated that bullying costs organizations in excess of \$200 billion annually. Surprisingly, neither employees nor employers report or confront it. Establishing a culture focused on eliminating workplace bullying—and, in turn, its negative impact on organizational productivity and growth—is essential for college and university sustainability in the 21st century.

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10–11:15 a.m.

## CONCURRENT SESSIONS (continued)

FINANCIAL SUSTAINABILITY

### **Voluntary Separation/Early Retirement Incentive for Staff and Faculty**

Room: *Commonwealth B*

**David Ackerman**, *Sibson Consulting*

**Pirie McIndoe**, *Sibson Consulting*

Universities around the country are examining the benefits of Voluntary Separation Incentive Plans rather than the traditional Early Retirement Incentive Plans. In many cases, the programs result in significant cost savings and produce additional operational and strategic benefits to the university. This session will include several polling questions to create a more interactive learning experience, and will discuss universities' goals in offering the incentive and key elements of the program.

TECHNICAL FUNDAMENTALS

### **Risk-Based Advisory Services: Strategic Partnerships and Approaches for Gaining Assurance in an Increasingly Complex Higher Education Environment**

Room: *Commonwealth C*

**Charles Ingram**, *Stockton University*

**Mark Laccetti**, *Baker Tilly Virchow Krause*

The increase in complexity of higher education management has compelled institutional leadership (i.e., trustees and senior leaders) to gain assurance that internal controls are working effectively to support the achievement of institutional objectives. In the public sector, where many trustees of colleges and universities may work, a well-developed internal audit function provides this ongoing assurance. However, many institutions may either have no internal audit function, or a very small function—and, therefore, little-to-no infrastructure to provide similar assurances. And if an institution has an internal audit function, it may not always have the expertise to cover the full spectrum of important risk areas such as research compliance, student financial aid, or cybersecurity. Leadership, therefore, needs a strategic partner to help foster an effective and intentional approach to managing risk, compliance, and the alignment of organizational strategy and operational tactics. Increasingly, institutions are seeking external support to bridge the resource or knowledge gap, and achieve their risk-advisory objectives.

# Friday, March 10 (continued)

10–11:15 a.m.

## CONCURRENT SESSIONS (continued)

ACADEMIC & UNIT  
BUSINESS OFFICER

### University Shared Services— Understanding Central vs. Unit Expectations

Room: *Commonwealth D*

**Kathleen Byington**, *Yale University*

**Stanley Chen**, *Drexel University*

**Nico Washington**, *UMBC*

This session offers a discussion about university-level shared services and the expectations of both central finance and unit business officers (economic realities and what we need from each other).

11:15–11:45 a.m.

## Refreshment and Checkout Break

Room: *Millennium Hall Prefunction*

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11:45 a.m.–1 p.m.

## CONCURRENT SESSIONS

FINANCIAL SUSTAINABILITY

### Conducting and Communicating Due Diligence: Is a Merger the Right Business Decision for Your University or College?

Room: *Commonwealth B*

**Karen House**, *Salem State University*

**Kerry Scala**, *University of New Hampshire*

Evaluating potential merger opportunities in higher education demands effective due diligence. Learn how to perform financial due diligence and communicate the results to decision makers from participants in one deal that went forward and one that did not.

11:45 a.m.–1 p.m.

## CONCURRENT SESSIONS (continued)

TECHNICAL FUNDAMENTALS

### ERISA Best Practices: How to Effectively Manage Your ERISA Plans and Reduce Litigation Risk

Room: Commonwealth C

**Bree Bullingham**, *Marymount Manhattan College*

**Paul Ciraulo**, *Marymount Manhattan College*

**Alan Pfeffer**, *Sentinel Benefits & Financial Group*

With the flurry of lawsuits targeting higher education organizations, retirement plan committees must reassess their strategy and fiduciary responsibility in sponsoring qualified retirement plans and 403(b) plans. This session highlights one college's process and lessons learned in implementing ERISA best practices, thereby mitigating legal implications of noncompliance.

ACADEMIC & UNIT BUSINESS OFFICER

### Recording and Tracking Sensitive, Multiyear Financial Agreements

Room: Commonwealth D

**Heather Finney**, *Massachusetts Institute of Technology*

**Magdalena Rieb**, *Massachusetts Institute of Technology*

**Kariuki Thande**, *Massachusetts Institute of Technology*

Whether it is money from the provost, dean, or other departments, most college or university departments have special financial arrangements with other parties to support their operations. How can a university business office systematically capture and execute these special deals and agreements that make up the fabric of collective financial support that university departments rely upon? These arrangements exist outside of the accounting system and are administratively burdensome to reconcile and maintain. We created a tool that can be used at any university to foster a collective sense of ownership over these agreements, and also to create a complete catalog of agreements in an efficient tool for future business officers who will inherit these responsibilities.

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1 p.m.

Program Adjourns



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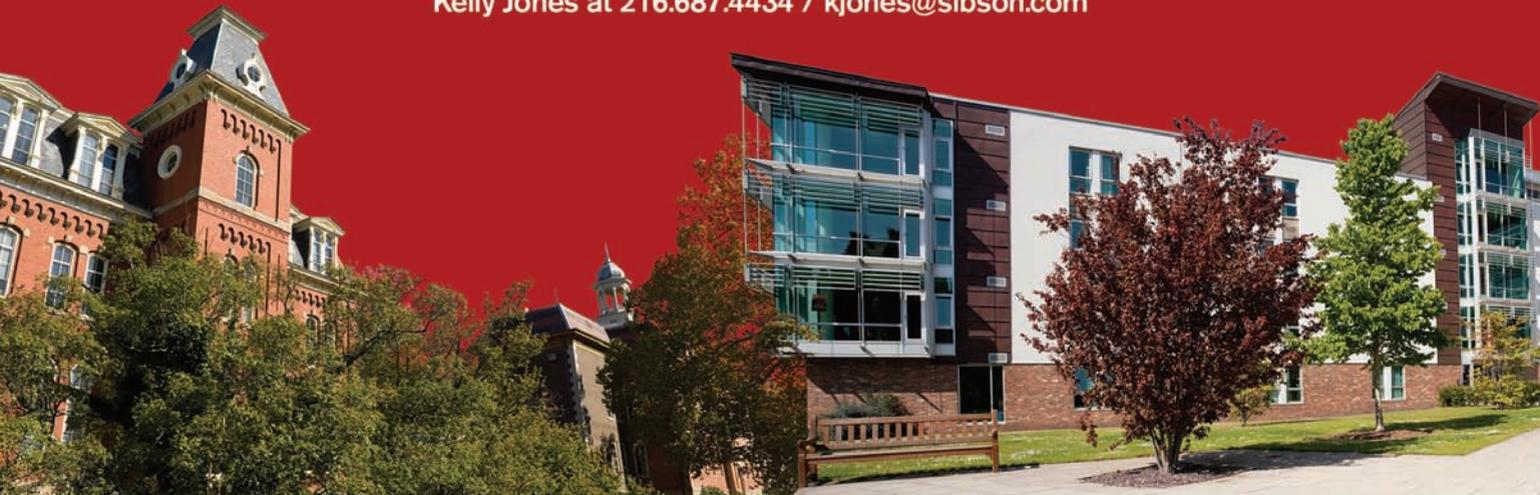
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