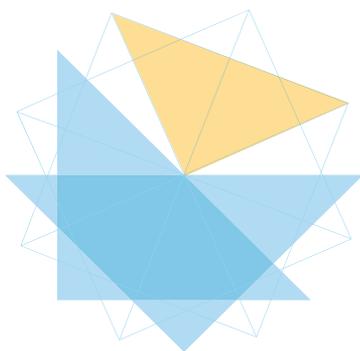




CRYSTALLIZING SOLUTIONS

EACUBO 2018 Workshop

March 28–30 • Crystal Gateway Marriott • Arlington, VA



Eastern Association of College
and University Business Officers

EACUBO

Program Guide Sponsored by **KOYA** | LEADERSHIP PARTNERS

► Schedule at a Glance

Wednesday, March 28

| | |
|---------------------|---|
| 7:30–8:30 a.m. | Next Generation Chief Business Officer (NGCBO) Session Registration and Breakfast |
| 8:30 a.m.–5:00 p.m. | NGCBO Session* |
| 2:00–5:00 p.m. | Early Registration for Workshop Attendees |

Thursday, March 29

| | |
|-----------------------|-------------------------|
| 7:30 a.m.–4:00 p.m. | Registration Open |
| 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.–12:45 p.m. | Lunch and EACUBO Update |
| 1:00– 2:15 p.m. | Concurrent Sessions II |
| 2:15–2:45 p.m. | Refreshment Break |
| 2:45–4:00 p.m. | Concurrent Sessions III |
| 4:00–5:30 p.m. | Networking Reception |

Friday, March 30

| | |
|----------------------|---------------------------------|
| 7:30 a.m.–1:00 p.m. | Registration Open |
| 7:30–8:30 a.m. | Networking Breakfast |
| 8:30–9:45 a.m. | General Session II |
| 10:00–11:15 a.m. | Concurrent Sessions IV |
| 11:15–11:45 a.m. | Refreshment and Check-out Break |
| 11:45 a.m.–1:00 p.m. | Concurrent Sessions V |

► Technology Information

WiFi Instructions

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 Marriott home page to open. Begin browsing.

WiFi brought to you by:



There's an App for that!

We streamlined our program guide this year. The new guide provides general information and the program schedule. To see more details of the program speakers, sponsors and events please download the mobile app.

1. Go to the **Apple App Store** or **Google Play**



and search for "EACUBO" and download the EACUBO mobile app.

2. Click on the **2018 Workshop icon**, and tap download.
3. If you already have the EACUBO app downloaded and are in another event, click **"Exit to Show List"** to get back to the main menu, and choose **2018 Workshop**.

We want to hear from you!

Download Twitter on your smartphone or go to twitter.com to join the conversation throughout the conference. For general comments and questions, include our EACUBO Workshop hashtag, **#EACUBOWorkshop**, in your tweets.

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University of Massachusetts, Lowell

▶ EACUBO: Working Together and Crystallizing Solutions

EACUBO strives to support financial and administrative leaders as pivotal partners who are well-positioned to assess strategies and approaches that fit their specific circumstance and their institutional culture. As business officers, we know that actionable and pragmatic (“crystallized”) solutions can be of the most value in confronting a challenge at-hand. Understanding a range of options, analytical and predictive data, case studies and technical fundamentals, can be the foundational elements for the strategic leader working to enable their academic institution to thrive, even in a challenging environment.

Recognizing its unique opportunity to help provide that support, EACUBO, the EACUBO Board, and scores of committee members and volunteers continue to design and implement events, programs, and services that focus on key areas, including:

- Developing strategic leaders;
- Creating a personalized experience for members to gain relevant knowledge through supporting relationships from a wide range of institutions across the region; and,
- Designing environments that will generate impactful solutions.

The EACUBO 2018 Workshop can help you crystallize your strategic thinking by offering:

- Interactive sessions that detail best practices and practical solutions that you can apply when you return to your institution;
- Opportunities for meaningful connections with colleagues in order to expand your professional network; and,
- Leadership and professional development for all career levels.

Active engagement with your EACUBO colleagues brings rewards—personally, professionally, and for our shared, higher education community. Please consider:

- Encouraging your campus colleagues to participate in EACUBO activities. Our Workshops provide a supportive community that can enhance their careers;
- Volunteering to serve the EACUBO membership and our shared industry. Your ideas and work on our planning committees and session proposals will shape our association’s future; and,
- Staying connected to EACUBO by joining us on LinkedIn and following us on Twitter.

The EACUBO Workshop provides a setting where we can analyze today's issues, tackle challenges, and work together to hone our skills. Big and small ideas alike can be created or learned at the Workshop and then crystallized or customized to be of the greatest value to our own, unique institutions. In doing so, we can enhance the value of the higher education business officer thereby supporting the educational mission of our colleges and universities, and the students, scholars, faculty, researchers, fellow employees, alumnae and the broad base of constituents in the local and global communities we serve – even in a challenging environment.

Continuing Professional Education

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

▶ The EACUBO Mentoring Program

EACUBO is pleased to offer a mentoring program for its members. This engaging program matches experienced senior business and financial officers with individuals preparing to become chief business officers in their next role. It is designed to capitalize on the skills and knowledge of EACUBO's experienced leaders and on their willingness to invest in building the strength and quality of the higher education business and finance administration profession by serving as mentors.

The requirements for mentees are straightforward –participants must be reasonably close to the CBO/CFO level, have a managerial role in an institution of higher education, and have the ability to participate actively in the program. Past participation in the EACUBO Next Generation Business Officer program is desirable but not a requirement. Experienced CBOs and CFOs serve as mentors. Becoming a Mentee involves both one-on-one time with your Mentor and group sessions with all Mentors and Mentees in the cohort over the course of a year. The cohort is typically between 4-8 mentee/mentor pairs.

The EACUBO Mentoring Program is by INVITATION ONLY. If you wish to participate, please contact Mentoring Program Coordinator, Jenni Sauer at: jenni.sauer@delval.edu.

Mentoring Partnership Session (Cohort 6 ONLY)

Wednesday, March 28, 3–4:30 p.m.

Room: Mt. Vernon

This is a formal face-to-face session that is the midway point during the yearlong mentoring program for the 2017–18 cohort. At this session, mentors will consider various professional development topics, followed by group discussion.

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

We are bringing back a highly successful professional development opportunity through which Workshop attendees, at any point in their careers, can participate. EACUBO, in partnership with ClearRock—a leadership development and career coaching firm—once again will be offering a limited number of one-on-one meetings with Laura Poisson, the firm's president on Thursday and Friday morning. If you did not reserve your spot already, head to the EACUBO registration desk to see if there are openings.

▶ EACUBO 2018 Workshop Sponsors

By Level

GOLD

TIAA

SILVER

Grant Thornton LLP | J.P. Morgan | Kaufman Hall
Koya Leadership Partners | PFM | RSM McGladrey, Inc.
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George K. Baum | Huron | KPMG LLP | M&T Bank
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By Event

| SPONSOR | EVENT/ITEM |
|-------------------------------------|---|
| Baker Tilly | Concurrent Sessions |
| George K. Baum & Company | Concurrent Sessions |
| Grant Thornton LLP | Name Badge Lanyard |
| Huron | Friday Breakfast |
| J.P. Morgan | General Session |
| Kaufman Hall | Thursday Breakfast |
| Koya Leadership Partners | Program Guide |
| KPMG LLP | Friday Morning Break |
| M&T Bank | Concurrent Sessions |
| PFM | Networking Reception |
| PricewaterhouseCoopers LLP | Thursday Morning Break |
| RSM McGladrey, Inc | Wireless Internet |
| Sentinel Benefits & Financial Group | Thursday Afternoon Break |
| Sibson Consulting | Networking Reception Bar |
| TIAA | New Generation Chief Business Officer Session |

▶ EACUBO 2018 Workshop Track Descriptions

The EACUBO 2018 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.

Financial Sustainability

Attendees to these sessions will engage in discussions regarding innovative approaches and tools available to deal with current fiscal challenges facing higher education leaders. Discussion leaders will explore topics that include risk management, cash management, collaborative development of cost savings strategies, alignment of strategic goals with fiscal resources, and strategic alliances.

Technical Fundamentals

Attendees to these sessions will learn and share ideas regarding practical issues facing today's business officer. Topics include analyzing current accounting and tax developments, and managing cyber risk on a campus.

Leadership and Talent Management

EACUBO defines leadership more as a mindset rather than a role or title. Attendees to these sessions will learn from leaders and colleagues about talent management, team building, ethical decision-making, and strategic thinking. These sessions are intended to increase attendees' capacity to create opportunities and generate solutions.

Academic and Administrative Unit Business Officer

These sessions will focus on topics of interest to business managers of major segments of the campus who work with but may not report through the University Chief Business Officer. Such roles would include college and program administrators, athletics business managers, and other operational unit business managers. Topics for these sessions will address a wide range of issues associated with enhancing and maximizing relationships and opportunities with constituents and consultants.

► Wednesday, March 28

7:30–8:30 a.m.

Next Generation Chief Business Officer Session Registration

Arlington Registration Desk

Next Generation Chief Business Officer Session Breakfast

Grand Ballroom Salons J-K

8:30 a.m.–5:00 p.m.

Next Generation Chief Business Officer Session

Grand Ballroom Salons J-K

Larry Goldstein, *Campus Strategies, LLC*

This session will address the important issue of leadership in our ever-changing industry, taking an in-depth look at the role of the chief business officer (CBO), the future timeline for those in higher education, career mapping, and much more. This workshop is specifically tailored for non-CBO senior staff in the finance/business division of colleges and universities.

7 CPE Credits, CPE Category: Personal Development

Sponsored By:



2:00–5:00 p.m.

Early Registration for Workshop Attendees

Arlington Registration Desk

▶ Thursday, March 29

7:30 a.m.–4:00 p.m.

Registration

Arlington Registration Desk

7:30–8:30 a.m.

Networking Breakfast

Arlington Ballroom Foyer

Sponsored By: **KaufmanHall**
axiomsoftware

8:30–9:45 a.m.

Navigating the Chaos of Washington: An Update on the Issues Impacting Higher Education

Arlington Ballroom Salons III-IV

Terry Hartle, *American Council on Education*

Terry W. Hartle, senior vice president for the Division of Government and Public Affairs at the American Council on Education, will give an update on what's happening at the federal level related to higher education. Topics will include the recently passed tax bill, immigration, reauthorization of the Higher Education Act, and more.

1.5 CPE Credits, CPE Category: Specialized Knowledge

9:45–10:15 a.m.

Refreshment Break

Arlington Ballroom Foyer

Sponsored By:



► Thursday, March 29

10:15–11:30 a.m.

Supporting Transformational Change Through NACUBO's Economic Models Project

Grand Ballroom Salons J-K

Melissa Beardmore, *Anne Arundel Community College*

Stephen Schafer, *Sarah Lawrence College*

Nicole Trufant, *University of New England*

Randy Roberson, *NACUBO*

In this interactive session, CBOs share insights on how their campuses have been inspired by NACUBO's Economic Models Project. Following an update on NACUBO's website toolkit, panelists will share how their institutions are developing innovative solutions to business model challenges.

1.5 CPE Credits, CPE Category: Management Services

Sponsored By: 

10:15–11:30 a.m.

Program Prioritization as a Foundation for Future Success

Arlington Ballroom Salon VI

Andrew Armitage, *University of the Sciences*

Anne McMahon, *University of the Sciences*

Johann Lindig, *Academic Strategy Partners*

Many institutions have completed successful prioritization processes based on Robert Dickeson's book, *Prioritizing Academic Programs and Services*. The University of the Sciences will discuss how it developed and executed a successful prioritization process against the challenging backdrop of interim leadership and the results it has achieved to date. For institutions thinking about engaging in program prioritization or looking for inclusive ways to streamline academic and nonacademic programs, this session will provide a comprehensive overview of the process, critical elements, and results.

1.5 CPE Credits, CPE Category: Management Services

Sponsored By:  **BAKER TILLY**

► Thursday, March 29

10:15–11:30 a.m.

Tax Update – Key Developments, Opportunities, and Risks

Arlington Ballroom Salons I-II

Rafael Dones, *Brown University*

Erin Couture, *PwC*

Travis Patton, *PwC*

Scrutiny of the tax-exempt sector at both the federal and state level continues to impact higher education, and staying focused on congressional and Internal Revenue Service (IRS) developments is an important part of managing a college or university. This session will guide you through the latest developments impacting institutions of higher education—from tax reform to IRS initiatives, we will cover tax risks and opportunities.

1.5 CPE Credits, CPE Category: Taxes

Sponsored By:  **George K. Baum & Company**
INVESTMENT BANKERS SINCE 1911

10:15–11:30 a.m.

Great Customer Service and Financial Information Leads to a High Performing Staff

Arlington Ballroom Salon V

Dallas Grundy, *University of Pennsylvania Law School*

Jerel Wohl, *University of Pennsylvania Law School*

In this session, the University of Pennsylvania Law School discusses how its Business Affairs office went from sporadic financial reporting, unclear staff roles and responsibilities, and inconsistent work processes to serving faculty, staff, and students in a new and improved way. Through the use of technology, a change in the chart of accounts, and new leadership, financial operations is becoming a source for premier customer service, transparent and understandable budgeting and financial reporting, and staff members who have a newfound understanding and support of the institution's goals and vision.

1.5 CPE Credits, CPE Category: Business Management & Organization

► Thursday, March 29

10:30 a.m.–4:20 p.m.

Career Counseling

Mt. Vernon

We are bringing back a highly successful professional development opportunity through which Workshop attendees, at any point in their careers, can participate. EACUBO, in partnership with ClearRock—a leadership development and career coaching firm—once again will be offering a limited number of one-on-one meetings with Laura Poisson, the firm’s president on Thursday and Friday morning. These confidential sessions are only available to registrants from colleges and universities who have a reserved appointment time. If you did not reserve an appointment and would like to participate, please check the EACUBO registration desk for any openings.

11:30 a.m.–12:45 p.m.

Luncheon and EACUBO Update

Arlington Ballroom Salons III-IV

1:00–2:15 p.m.

Social Engineering Fraud

Grand Ballroom Salons J-K

Tim Graf, *Virginia Commonwealth University*

Dan Han, *Virginia Commonwealth University*

Eric Norman, *St. Anselm College*

Kathryn D’Angio, *U.S. Bank*

Kevin Dillon, *U.S. Bank*

The cyberthreat landscape is constantly evolving, with organizations and individuals facing an ever-changing set of scams, schemes, and attacks from criminals, hacktivists, and even nation states. This session will explore the latest cyberthreat trends, how the attacks actually work, and what you can do to protect your organization and your family. We will discuss government programs, free resources, and lessons learned from one of the nation’s largest banks.

1.5 CPE Credits, CPE Category: Information Technology

► Thursday, March 29

1:00–2:15 p.m.

A Changing Landscape: The Role of Mergers and Strategic Partnerships in Higher Education

Arlington Ballroom Salons I-II

Phil McCabe, *Sacred Heart University*

Christopher Collins, *Moody's Investors Service*

Amid a changing higher education landscape, colleges and universities are increasingly turning mergers and strategic partnerships into positive outcomes that provide opportunities for efficiencies, programmatic diversification, and brand enhancement. This presentation will draw upon the firsthand experience of Sacred Heart University and its recent merger with St. Vincent's College, focusing on the specific challenges associated with merging, managing risk, and ensuring successful programmatic and governance integration. Moody's will provide perspective of sector-wide trends and expectations of what we'll see in the future.

1.5 CPE Credits, CPE Category: Management Services

Sponsored By:  **George K. Baum & Company**
INVESTMENT BANKERS SINCE 1888

1:00–2:15 p.m.

Tips and Tricks for Managing Tax Policy and Related Recordkeeping

Arlington Ballroom Salon VI

Laura Benner, *Georgetown University*

Rachel Spurlock, *Crowe Horwath LLP*

Staying on top of legislation and regulation regarding tax policy is vital to managing a college or university's risk, but with competing priorities, staying on top of tax issues is getting more difficult than ever. During this session, we will facilitate an open dialogue on common (and uncommon) policies that may impact tax reporting for your institution, including policies and procedures for accounting and reporting for athletic apparel, spousal travel, athletic tickets, housing benefits, automobiles, worker classification, and more.

1.5 CPE Credits, CPE Category: Taxes

► Thursday, March 29

1:00–2:15 p.m.

Maximizing The Outcomes from Consultants

Arlington Ballroom Salon V

Patrick Gordon, *Georgetown University Medical Center*

James Reisert, *MedStar Health Research Institute*

Using an engagement with a single client and another between two entities as examples, this session will discuss how managing an engagement and internalizing its outcome can maximize the immediate and long-term outcomes of the consulting relationship. Through this interactive session based on concrete experience, participants will gain an understanding of reasons for engaging consultants, the pros and cons of bringing consultants on board, and strategies for sustaining results and consulting relationships.

1.5 CPE Credits, CPE Category: Specialized Knowledge

Sponsored By: **M&T Bank**

2:15–2:45 p.m.

Refreshment Break

Arlington Ballroom Foyer

Sponsored By: **Sentinel Benefits**
& FINANCIAL GROUP

2:45–4:00 p.m.

It Takes a Village: How Innovative Strategies and Collaborative Business Relationships Spurred a College's Financial Turnaround

Grand Ballroom Salons J-K

Robert Vogel, *La Roche College*

Daniel Baronick, *S&T Bank*

Susan Maloney, *Baker Tilly*

In 2002, La Roche College was teetering on the brink of closure with a poor Department of Education score and financial pressures mounting. Participants will discover how the institution, over the course of several years and in collaboration with key partners, built and executed a strategic turnaround plan that leveraged the college's own resources; focused on enrollment enhancements; and tapped into innovative insights and involvement from strategic partners in business advisory, financial consulting, and banking. The results have reinvigorated the institution and created a long-term path to stronger operational performance overall.

1.5 CPE Credits, CPE Category: Business Management & Organization

► Thursday, March 29

2:45–4:00 p.m.

Operations Impact: Savings and Behavior Changes with Simple Key Facilities Metrics

Arlington Ballroom Salon V

Steve Glazner, *APPA: Leadership in Educational Facilities*

Sally Grans Korsh, *NACUBO*

Using APPA/NACUBO survey data submitted from all regions and institutional campus types, this session will provide information on the importance of the consumption of energy, electric, water, waste, and carbon for all stakeholders at a campus. Participants will learn ways to graphically present data to impact student behavior, analyze methodologies and ways to improve cross-connectivity and communication, and evaluate the consumption issue from a personal as well as institutional level.

1.5 CPE Credits, CPE Category: Specialized Knowledge

2:45–4:00 p.m.

Managing Cyber Risk in Higher Education - Views From the Legal and Financial Perspectives

Arlington Ballroom Salons I-II

Patrick Richey, *Nazareth College*

F. Paul Greene, *Harter Secrest & Emery LLP*

This presentation focuses on three crucial areas of cyber risk management: assessing and addressing the legal risk, developing the proper plans and culture to prepare for the inevitable breach, and the financial considerations of managing/mitigating cyber risk. Participants will learn about the patchwork of rules and regulations that give rise to legal cyber risk, the growing trends in breach-related litigation, the importance of security beyond the IT function, and the best way to motivate stakeholders to adopt proper security and breach-planning practices.

1.5 CPE Credits, CPE Category: Information Technology

Sponsored By:  **BAKER TILLY**

▶ Thursday, March 29

2:45–4:00 p.m.

Using Affinity Groups to Optimize Performance and Knowledge Sharing

Arlington Ballroom Salon VI

Romayne Botti, *Carnegie Mellon University*

Matthew Coley, *Carnegie Mellon University*

Daniel Fassinger, *Carnegie Mellon University*

Daniel Giammatteo, *Carnegie Mellon University*

Gain an understanding of how to use affinity groups to improve performance by bringing staff members in similar roles together to share ideas and discuss challenges and successes. Carnegie Mellon staff will describe the process they used in identifying the various functional areas around which to form affinity groups as well as the ways they use the groups to improve communication across departments and to encourage community building and idea sharing.

1.5 CPE Credits, CPE Category: Business Management & Organization

4:00–5:30 p.m.

Networking Reception

Arlington Ballroom Salons III-IV

Sponsored By:



The PFM Group
Public Financial Management, Inc.
PFM Asset Management LLC
PFM Advisors

 Sibson Consulting

► Friday, March 30

7:30 a.m.–12:00 p.m

Registration

Arlington Registration Desk

7:30–8:30 a.m.

Networking Breakfast

Arlington Ballroom Salons III-IV

Sponsored By:  **HURON**

8:30–9:45 a.m.

Howard Community College's Journey to Excellence – The Transformative Nature of Continuous Quality Improvement

Arlington Ballroom Salons III-IV

Dr. Kathleen Hetherington, *Howard Community College*

Learn how Howard Community College's quest for excellence shapes the work of faculty and staff through continuous quality improvement, employee engagement, and a focus on student success. The college has a long history of promoting leadership and engagement across the campus at all levels through employee training, recognition, and encouragement. The college's innovative approaches to working with four-year institutions will be shared, along with how the college's business office supports the institutional mission, values, and goals.

1.5 CPE Credits, CPE Category: Personal Development

Sponsored By: **J.P.Morgan**

8:45 a.m.–11:35 a.m.

Career Counseling

Mt. Vernon

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► Friday, March 30

10:00–11:15 a.m.

Elevating Team Performance

Arlington Ballroom Salons I-II

Steve Heisey, *Rutgers University*

At Rutgers University, one senior executive collaborated with the university's Human Resources department to create an integrative approach that included self, peer, and senior leader assessments and focused on leadership skill development. The approach, which was done collaboratively with the leadership team and not connected to merit, resulted in an executive leadership team who talks openly about its leadership skills and development, seeks input from each other, and welcomes feedback. This session will review the Rutgers case study and discuss how it could benefit you and your team.

1.5 CPE Credits, CPE Category: Personal Development

10:00–11:15 a.m.

Municipal Market Disclosure Trends for Higher Education Institutions

Arlington Ballroom Salon V

Teri Guarnaccia, *Ballard Spahr LLP*

This session will discuss the basic framework for municipal market regulation and how colleges and universities can provide comprehensive and accessible disclosure to investors—topics that are of particular importance in light of recent increases in U.S. Securities and Exchange Commission (SEC) municipal market enforcement actions. We will share guidance on how best to use the tools available on the Municipal Securities Rulemaking Board (MSRB) Electronic Municipal Market Access (EMMA) website; discuss new areas of disclosure such as cybersecurity, data privacy, and climate change; and discuss how tax reform affects primary and secondary disclosures. The session will end with information on how to respond and who to call if contacted by the SEC.

1.5 CPE Credits, CPE Category: Finance

Sponsored By: **M&T Bank**

► Friday, March 30

10:00–11:15 a.m.

Accounting, Auditing and Regulatory Update

Grand Ballroom Salons J-K

Lisa Lipsky, *Grant Thornton LLP*

Dennis Morrone, *Grant Thornton LLP*

Mary Torretta, *Grant Thornton LLP*

Institutions must be increasingly proactive in monitoring new accounting and auditing standards and regulatory changes as well as identifying areas where potential accounting and reporting issues are likely to occur as a result of new transactions and operational changes. This session will discuss the new and changing technical updates from the Financial Accounting Standards Board (FASB)/Governmental Accounting Standards Board (GASB), including the latest revenue recognition and leasing standards, the not-for-profit reporting model, and potential institutional impacts on the recently enacted tax bill. Speakers will highlight new technical requirements and share some practical implementation tips, best practices, and examples to assist member institutions through the assessment and implementation process.

1.5 CPE Credits, CPE Category: Accounting

Sponsored By:  George K. Baum & Company
INDEPENDENT MEMBER SINCE 1944

10:00–11:15 a.m.

Building Robust Corporate Engagement Programs: A Discussion of the Opportunities and Challenges

Arlington Ballroom Salon VI

Eleanor Carlough, *Harvard Engineering*

Sam Liss, *Harvard Office of Technology Development*

Presenters will provide a working plan for the Harvard School of Engineering and Applied Sciences, followed by a “fireside chat” with questions and participation from the audience. Topics will include management of intellectual property, conflicts of interest, research collaboration, multitiered engagement strategies, and incentives.

1.5 CPE Credits, CPE Category: Business Management & Organization

► Friday, March 30

11:15–11:45 a.m.

Refreshment & Check-Out Break

Arlington Ballroom Foyer

Sponsored By: 

11:45 a.m.–1:00 p.m.

Establish a Commitment to Integrity, Ethics and Accountability for your Institution

Grand Ballroom Salons J-K

Sandy Richtermeyer, *University of Massachusetts, Lowell*

This interactive session will discuss ways that leaders can demonstrate a commitment to integrity, ethical values and accountability. Principles from the well-established and widely used COSO Internal Control Integrated Framework will provide a foundation for the discussion with special emphasis on the Control Environment aspect of the Framework. Examples and scenarios will be discussed with a focus on how managers, leaders and board members can influence 1) the tone at the top and throughout the institution; 2) leading by example on matters of integrity and ethics; 3) establishment or refinement of standards of conduct; 4) implementation of solid practices to evaluate individuals and teams to promote ethical behavior with or without standards of conduct; and 5) ways to address departures from ethical behavior or deviations from standards of conduct.

1.5 CPE Credits, CPE Category: Behavioral Ethics

► Friday, March 30

11:45 a.m.–1:00 p.m.

Cyber and ERM in a Higher Education Setting

Arlington Ballroom Salons I-II

Kara Kearney-Saylor, *University of Buffalo*

David Gmelich, *KPMG*

John Kupinski, *KPMG*

As higher education entities increasingly embrace new technologies and operating models such as mobile, collaborative, and cloud, their chances of a cybersecurity breach grow exponentially. A cybersecurity breach presents consequential and costly ramifications, including lost revenues, operational disruption, remediation costs, claims, and fines. This presentation will review the changing landscape of cybersecurity, how to respond to cyber risk with proper “cyber hygiene,” cybersecurity within the context of enterprise risk management (ERM); the National Institute of Standards and Technology (NIST) Special Publication (SP) 800-171 cybersecurity regulation, and the steps being taken to address these cybersecurity threats and related enterprise risks.

1.5 CPE Credits, CPE Category: Information Technology

11:45 a.m.–1:00 p.m.

Cash Management and Capital Planning

Arlington Ballroom Salon V

Mitch Wein, *Haverford College*

Jeremy Bass, *Public Financial Management*

Dave Reeser, *Public Financial Management*

In an environment with increasing demands placed on available financial resources, it makes sense to continue to optimize both the institution’s unrestricted cash position and its long term liabilities. Using a holistic approach to analyze cash management alongside the school’s long term liabilities and by connecting both sides of the balance sheet, the institution can enhance financial performance, net interest income and reduce certain financial risks. The panel will start with an update and overview of the current capital markets including a summary of the important changes emanating from 2017 Tax Bill and end with some concepts about assessing your levels of net liquidity and asset management strategies that could be employed to achieve an effective outcome given available resources.

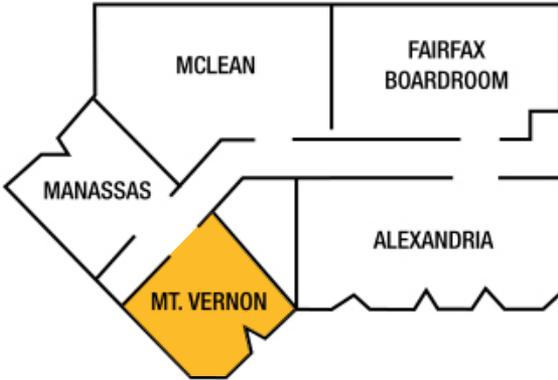
1.5 CPE Credits, CPE Category: Finance

1:00 p.m.

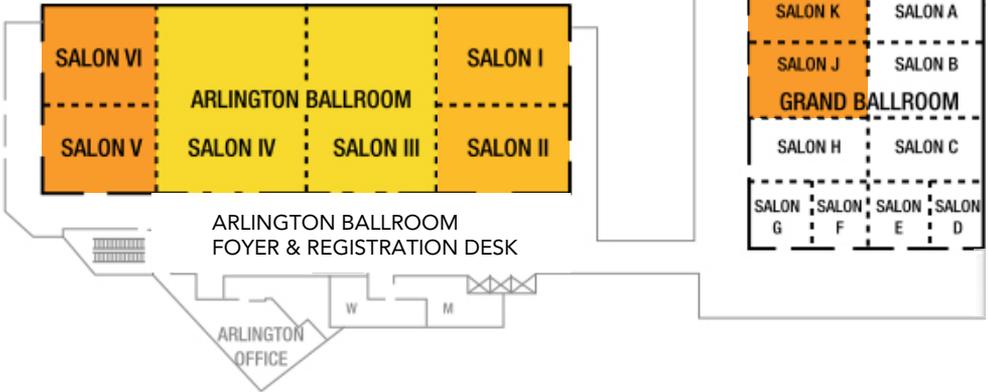
Program Adjourns

▶ Floor Plan

SECOND LEVEL



FIRST LEVEL





NEW SIGHTS, GREATER HEIGHTS

EACUBO 2018 ANNUAL MEETING

OCTOBER 21-24

BUFFALO NIAGARA CONVENTION CENTER | BUFFALO, NY