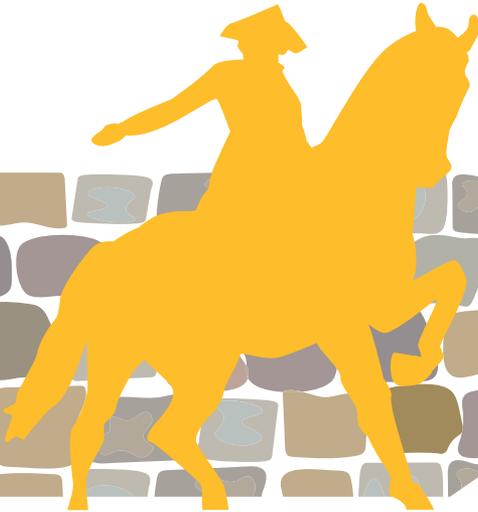




# EACUBO 2019 WORKSHOP



## Revolutionary SOLUTIONS

March 20–22  
BOSTON

# Schedule at a Glance

## Wednesday, March 20

- 7:30–8:30 am Next Generation Chief Business Officer Session Registration
- 8:30 am–5:00 pm Next Generation Chief Business Officer (NGCBO) Session
- 2:00–5:00 pm Early Registration for Workshop Attendees

## Thursday, March 21

- 7:30 am–4:00 pm Registration Open
- 7:30–8:30 am Networking Breakfast
- 8:30–9:45 am General Session I
- 9:45–10:15 am Refreshment Break
- 10:15–11:30 am Concurrent Sessions I
- 11:30 am–12:45 pm Lunch
- 1:00–2:15 pm Concurrent Sessions II
- 2:15–2:45 pm Refreshment Break
- 2:45–4:00 pm Concurrent Sessions III
- 4:00–5:30 pm Networking Reception

## Friday, March 22

- 7:30 am–12:00 pm Registration Open
- 7:30–8:30 am Networking Breakfast
- 8:30–8:45 am EACUBO Update
- 8:45–10:00 am General Session II
- 10:15–11:30 am Concurrent Sessions IV
- 11:30–11:45 am Refreshment and Check-out Break
- 11:45 am–1:00 pm Concurrent Sessions V

# Technology Information

## WiFi Instructions

1. Select wireless network: **RSM Network**
2. Enter network key to connect online: **rsmus123**
3. Open Internet browser.
4. Wait for the Westin home page to open. Begin browsing.

Sponsored By:



## There's an App for that!

We have streamlined our program guide this year. The new guide provides general information and the program schedule. To see more details on the program speakers, sponsors, and events, please make sure to 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 2019 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 **2019 Workshop**.



## We want to hear from you!

Download Twitter on your smartphone or go to [twitter.com](https://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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# EACUBO 2019 Workshop Sponsors

## By Level

### PLATINUM

Bank of America Merrill Lynch | J.P. Morgan | PFM | TIAA

### GOLD

Grant Thornton LLP | Koya Leadership Partners | M&T Bank  
Santander Commercial Banking | Sibson Consulting

### SILVER

BerryDunn | Citrin Cooperman | Con Edison Solutions | Kaufman Hall  
KPMG LLP | RSM

### BRONZE

Apogee | The Fulcrum Group | Sentinel Benefits and Financial Group

## By Event

SPONSOR	EVENT/ITEM
Apogee	Friday Morning Break
Bank of America Merrill Lynch	General Session I
BerryDunn	Concurrent Session
Citrin Cooperman	Concurrent Session
Con Edison Solutions	Thursday Afternoon Break
The Fulcrum Group	Friday Breakfast
Grant Thornton LLP	Name Badge Lanyard
J.P. Morgan	General Session II
Kaufman Hall	Thursday Breakfast
Koya Leadership Partners	Onsite Program Guide
KPMG LLP	Thursday Lunch
M&T Bank	Concurrent Session
PFM	Networking Reception
RSM	Wireless Internet
Santander Commercial Banking	Concurrent Sessions
Sentinel Benefits and Financial Group	Thursday Morning Break
Sibson Consulting	Networking Reception Bar
TIAA	Next Generation Chief Business Officer Session

# EACUBO: Revolutionary Solutions Make Our Community Thrive

As we celebrate the start of our 100th year since our founding in 1919, EACUBO is honored that you joined us in Boston for our annual Workshop. EACUBO is proud to recognize we are, and always have been, an association created by and for its members and volunteers.

Over the years, the Workshop has been the place where thousands of colleagues have shared and discerned best practices and innovative ideas from colleges and universities across our region. In the challenging environment that institutions find themselves in today, creative thought leadership permits business officers to be continually successful in directing ideas that may have been, at one time, viewed as revolutionary solutions. Today, through enhanced utilization of factors ranging from data and analytics, to multi-campus collaboration, to a prioritized focus on institutional mission, to levers that enhance financial resiliency, creative and shared problem-solving across institutional silos, these tactics may easily morph into revolutionary solutions.

For the past 100 years, EACUBO has been dedicated to providing support and opportunities for networking to its regional members. As such, EACUBO, the EACUBO Board, and scores of committee members help 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.
- Designing environments that generate influential solutions.

The EACUBO 2019 Workshop can help you develop revolutionary thinking and strategic solutions 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 to expand your professional network.
- Leadership and professional development for all career levels.

# EACUBO: Revolutionary Solutions Make Our Community Thrive *(continued)*

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.
- Staying connected to EACUBO by joining us on LinkedIn and following us on Twitter.

The EACUBO Workshop provides a setting where we can tackle today's issues big and small, and work together to develop innovative solutions that can be customized to be of the greatest value to our own unique institutions. In doing so, we enhance the value of the higher education business officer, which supports the educational mission of the colleges and universities we serve—and prepares us for success throughout the next 100 years.

# The EACUBO Mentoring Program

The EACUBO Mentoring Program is by INVITATION ONLY. If you wish to get involved, please contact Melody Bianchetto at [msb2p@virginia.edu](mailto:msb2p@virginia.edu) and Rich Kelley at [rich.kelley@une.edu](mailto:rich.kelley@une.edu).

## EACUBO Mentoring Program Opening Session (Cohort 6)

This is the first formal, face-to-face session and begins the 2019-20 mentoring program. There are three segments to the session:

1. Introduction to EACUBO Mentoring Program
2. How To Get the Most From a Mentoring Relationship
3. Developing a Mentoring Partnership Agreement

### *Learning Objectives:*

- ➔ Identify expectations for mentoring relationships
- ➔ Strengthen communication and listening skills
- ➔ Provide networking opportunities for mentors and mentees

## 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. 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 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.



# EACUBO 2019 Workshop Track Descriptions

The EACUBO 2019 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 will enhance the financial sustainability of the institution by increasing efficiency of operations and space utilization, promote behavioral change, avoid risks, encourage collaborative development of cost-saving strategies, align strategic goals with fiscal resources, and promote 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 financial modeling.

## **Change Management**

EACUBO defines leadership as more of a mindset, rather than a role or title. Attendees to these sessions will learn how to foster an environment that promotes high performance on a personal, professional, and organizational level, and build skills that will help them understand and effectively deal with the multitude of challenges facing leaders in higher education. These sessions are intended to increase attendees' capacity to create opportunities and generate solutions.

## **Technology and Data**

Colleges and universities are using data, technology, and specialized knowledge to answer questions, reveal institutional needs, or improve financial performance. Attendees to these sessions will learn and engage on timely topics affecting higher education, from big-picture trends to best practices, to inform decisions that meet institutional goals.

## Wednesday, March 20

**7:30–8:30 am**

### **Next Generation Chief Business Officer Session Registration**

*America Ballroom Foyer*

**8:30 am–5:00 pm**

### **Next Generation Chief Business Officer (NGCBO) Session**

*America North Ballroom*

Larry Goldstein, *Campus Strategies, LLC*

This year's Next Generation Chief Business Officer session will address the important issue of leadership in our ever-changing industry, taking an in-depth look at the CBO's role, 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 pm**

### **Early Registration for Workshop Attendees**

*America Ballroom Foyer*

# Thursday, March 21

7:30 am–4:00 pm

## Registration

America Ballroom Foyer

7:30–8:30 am

## Networking Breakfast

America South Ballroom

Sponsored By: KaufmanHall **AXIOM**

8:30–9:45 am

## Making Strategic Investments in the Liberal Arts—and Why It Matters

America Center Ballroom

Michael Roth, President, Wesleyan University

Michael Roth, the President of Wesleyan University and author of *Beyond the University: Why Liberal Education Matters*, will discuss the value of higher education generally, and the liberal arts in particular. In our fractured, polarized culture, the commitment to broad integrative, learning is more important than ever. This commitment is the opposite of elitist: It is pragmatic and democratic. In addition, President Roth will provide insight into a number of initiatives and programs at Wesleyan University and how they integrate within a pragmatic approach to the liberal arts education model.

1.5 CPE Credits, CPE Category: Specialized Knowledge

Sponsored By: **Bank of America**   
**Merrill Lynch**

9:45–10:15 am

## Refreshment Break

America Ballroom Foyer

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

# Thursday, March 21

10:15–11:30 am

## **Modernizing Your Finance Organization**

St. George AB

Tim Harlan, *Slippery Rock University*

Renee Jenkins, *Slippery Rock University*

Nick McIntire, *Slippery Rock University*

Molly Mercer, *Slippery Rock University*

John Simon, *Slippery Rock University*

Learn how one university implemented a series of improvements around people, processes and technology that has positioned them to better serve their institution, with the same level of resources. This presentation can assist you in taking the vision you have to transform the finance function and provide some practical approaches to make systematic changes to put your finance team in a stronger position.

1.5 CPE Credits, CPE Category: Finance

10:15–11:30 am

## **The Search for a Better Budget Model**

America North Ballroom

Tim Bowman, *Harvard University*

Julie Dolan, *Clark University*

Anthony Rini, *Northeastern University*

Claire Esten, *Grant Thornton LLP*

Larry Ladd, *Grant Thornton LLP*

As financial pressures grow, choices get more difficult to make, and more radical approaches to resource allocation become more necessary. This presentation outlines alternatives to the traditional incremental budgeting approach that are more likely to match emerging needs.

1.5 CPE Credits, CPE Category: Finance

Sponsored By:  **Santander**  
Commercial Banking

# Thursday, March 21

10:15–11:30 am

## Accounting and Auditing Update—GASB Focus

*America Center Ballroom*

David Gagnon, KPMG LLP

Dean Geesler, KPMG LLP

Marie Zimmerman, KPMG LLP

Participants will hear and see insights about new GASB standards affecting financial reporting at colleges and universities in 2019 and beyond. Topics covered will include fiduciary activities, leases, reporting concerns, and other matters.

1.5 CPE Credits, CPE Category: Accounting

Sponsored By:



10:15–11:30 am

## Blockchain! Bitcoin! New Technologies and Their Possible Impact on Higher Education

*St. George CD*

Sean Adams, MIT

Syantana Chakraborty, U.S. Bank

As new technologies are taking hold in numerous industries, higher education institutions are at the very early stages of investigating their potential impact on campus operations. In this session, you will hear from an institution speaker, as well as an expert in how the financial industry is exploring blockchain's potential benefit to financial transactions. These presenters will discuss their experiences with cryptocurrencies.

1.5 CPE Credits, CPE Category: Information Technology

Sponsored By:



10:30–4:30 pm

## Career Counseling

*Independence A*

These confidential sessions are available only to registrants from colleges and universities who have a reserved appointment time.

Sponsored By: **ClearRock**  
AWARENESS UNLOCKS POTENTIAL

# Thursday, March 21

11:30 am–12:45 pm

## Lunch

America South Ballroom

Sponsored By: 

1:00–2:15 pm

## Organizational Health - application, implementation and outcomes

St. George AB

T. Muriel Brisbon, *Haverford College*

Alison DiFlorio, *Exude, Inc.*

Twana Harris, *Exude, Inc*

Greg Offner Jr., *Exude, Inc*

Attend this session to learn an innovative approach grounded in best practice that connects your strategy to your people. Our goal is to give audience members the opportunity to engage the other leaders in their organization and help them understand the impact that alignment of strategy and culture has on their people and performance.

## 1.5 CPE Credits, CPE Category: Business Management and Organization

1:00–2:15 pm

## UVAFinance: Our Journey Toward Transparency and Trust

America North Ballroom

Patty Marbury, *University of Virginia*

Brandi Van Ormer, *University of Virginia*

UVAFinance has existed as a unit made up of seven departments for just three years. We came together under new leadership, as teams that had been working in silos—accustomed to our own processes and ways of functioning—and as colleagues unused to working with one another. In this session, we present how we leveraged training, communication channels, and employee engagement activities in new ways to allow our team to grow in skill, become cross-functional, engage in continuous improvement, and come to think of themselves as one central unit functioning together to further the University's mission.

## 1.5 CPE Credits, CPE Category: Business Management & Organization

# Thursday, March 21

1:00–2:15 pm

## How Higher Education Institutions Can Prepare for Revenue Recognition

*America Center Ballroom*

Michelle Spriggs, *CBIZ and MHM*

Michael Hoyle, *Lasell College*

New revenue recognition standards under ASC 606 and changes to ASC 958 are taking effect, and higher education institutions should be getting ready. Tax-exempt entities will need to consider transactions other than contributions and investment returns to correctly record revenue under the new accounting criteria, as well as consider the guidance that was recently released clarifying the new standards related to contributions made and received. In this presentation, we will discuss how higher education institutions can prepare for the change and best practices for implementation.

1.5 CPE Credits, CPE Category: Accounting

Sponsored By:  **Santander**  
Commercial Banking

1:00–2:15 pm

## Campus Business Officer Benchmarking Tool

*St. George CD*

Russ Hannah, *Arkansas State University*

Patrick Wamsley, *Medical University of South Carolina*

In 2018, EACUBO and the other ACUBOs came together and participated in the Campus Business Officer Benchmarking Initiative. The benchmarking tool includes an easy-to-use online template and contains more than 100 reports. It has a filtering capability that will enable you to generate peer-group comparisons and multiyear trend reports. In this session, you will see an overview of the benchmarking reports from the 2018 survey, and you will learn how you might use it at your institution.

1.5 CPE Credits, CPE Category: Specialized Knowledge

2:15–2:45 pm

## Refreshment Break

*America Ballroom Foyer*

Sponsored By:  **conEdison**  
**Solutions**  
Energy. Efficiency. Expertise.

# Thursday, March 21

2:45–4:00 pm

## **The Yin and Yang of Change and Project Management**

St. George AB

Marcelina Nowosadzki, *Nelnet Campus Commerce*

Erin Zuzula, *University of Massachusetts Amherst*

In this session, you will learn to identify the fine boundaries between change management and project management. We will discuss the key differences and, more important, how to join both disciplines and use key concepts to your advantage—and ease the stress of any transformation.

**1.5 CPE Credits, CPE Category: Business Management and Organization**

2:45–4:00 pm

## **Breathing New Life Into an Aging Residence Hall Using an Innovative P3**

St. George CD

Matthew Frist, *Duquesne University*

Alton Irwin, *COCM*

Michael Leonczyk, *Harrison Street/Real Estate Capital*

David Yeager, *Radnor Property Group LLC*

Hear from the University and its private sector partners as they discuss key features of an innovative public-private partnership (P3) and how it may influence future projects being contemplated on campuses around the country. The panel will address a range of topics, including: why a P3 structure best met the University's goals for this project; key features of the competitive RFP process; the financial structure; the renovation scheme; and other features of the transaction that might be replicated in future projects.

**1.5 CPE Credits, CPE Category: Finance**

# Thursday, March 21

2:45–4:00 pm

## Tax Update—Impact of Tax Reform on Colleges and Universities

*America North Ballroom*

Michael Quesada, *Harvard University*

Andrea Sexton, *Harvard University*

Gwen Spencer, *PwC*

Paul Tanis, *PwC*

This session will help participants understand the tax reform provisions most relevant to institutions of higher education; the current status of IRS guidance; and real-world strategies for addressing the impact of tax reform and dealing with uncertainty.

1.5 CPE Credits, CPE Category: Taxes

2:45–4:00 pm

## Leveraging Institutional Data to Make Informed Strategic Decisions

*America Center Ballroom*

Marco Benedetti, *Canisius College*

Ryan Caster, *Freed Maxick CPAs, P.C.*

Henry Cossitt, *Freed Maxick CPAs, P.C.*

Decreasing enrollment trends, downward pressure on tuition costs, and increasing operating costs have made it essential that colleges and universities implement strategies to proactively manage enrollment and institutional costs. Colleges and universities will need to use technologies with data analytic capabilities to proactively monitor enrollment trends and costs, not only at the institutional level, but also at the program level. Presenters will discuss metrics that can be tracked, using data analytic techniques and processes, and will provide examples of how to aggregate and analyze institutional data to drive better-informed decisions that address the challenges colleges and universities face today.

1.5 CPE Credits, CPE Category: Specialized Knowledge

Sponsored By: **M&T Bank**

4:00–5:30 pm

## Networking Reception

*America South Ballroom*

Sponsored By:  pfm

 Sibson  
Consulting

# Friday, March 22

7:30 am–12:00 pm

## Registration

America Ballroom Foyer

7:30 am–8:30 am

## Networking Breakfast

America South Ballroom

Sponsored By:



8:30–8:45 am

## EACUBO Update

America Center Ballroom

8:45–10:00 am

## Becoming Affiliation-Ready; Things You Absolutely Need to Know

America Center Ballroom

Martin Howard, *Boston University*

David Quigley, *Boston College*

Barbara E. Brittingham, *New England Commission of Higher Education*

Anne Phillips Ogilby, *Ropes and Gray LLP*

Michael J. Cooney, *Nixon Peabody LLP (Moderator)*

The primary focus of this panel style session will be on organizational orientation and capacity in a challenging financial environment. In addition to mergers, such as with Boston University and Wheelock College, the discussion will focus on collaborations and affiliations, such as The Massachusetts Green High Performance Computer Center and shared faculty housing. Attendees for this session should expect to leave thinking more strategically about affiliations for their institutions, and what it takes to make them successful.

1.5 CPE Credits, CPE Category: Specialized Knowledge

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

## Friday, March 22

9:45 am–4:30 pm

### Career Counseling

*Independence A*

These confidential sessions are available only to registrants from colleges and universities who have a reserved appointment time.

Sponsored By: **ClearRock**  
AWARENESS UNLOCKS POTENTIAL

10:15–11:30 am

### **Not If, But When: Aligning ERM and Strategic Planning to Address Today's Risks in Higher Education**

*St. George AB*

Christopher Garrity, *Saint Joseph's University*

Frank Bossle, *Baker Tilly*

John Park, *Baker Tilly*

In today's challenging and turbulent higher education environment, taking a strategic approach to risk management is more important than ever. Events at colleges and universities across the country over the past six months illustrate how quickly past accomplishments and accolades can evaporate, emphasizing the urgency of implementing an integrated approach to strategic planning and enterprise risk management (ERM) processes. Presenters will identify best practices and lessons learned in strategic planning and provide tools to help participants to begin aligning the two activities at their home institutions.

**1.5 CPE Credits, CPE Category: Management Services**

# Friday, March 22

10:15–11:30 am

## **Relieving Operating Budget Through Central Plant Modernization**

*St. George CD*

Vincent Harkins, *American University*

Douglas Kudravetz, *American University*

Nicholas Lewandowski, *The Fulcrum Group*

Lucas Janes, *The Fulcrum Group*

College and university business officers across the country grapple every year with strategies to reduce campus operating expenses. Few realize that most campuses have an untapped opportunity to reduce millions of dollars in annual operating expenses in their central plants, dramatically reduce unexpected maintenance costs, and simultaneously cut campus water consumption and carbon emissions substantially. This session will present a case study of a major transformation of the central power plant and heating infrastructure on American University's main campus. Through deliberate and creative planning, the capital program will achieve a 13-year payback after two years of construction on the 3.0 million GSF campus. Presenters will also discuss the challenges of balancing competing demands for investment in new capital projects, deferred maintenance, and sustainability programs, as well as strategies for making smart investments that satisfy all three needs.

**1.5 CPE Credits, CPE Category: Finance**



# Friday, March 22

10:15–11:30 am

**Financial Modeling: How to Move Stakeholders to Action With Your Financial Story**

*America Center Ballroom*

Anthony Ferullo, *Endicott College*

John Gruppo, *New Jersey Institute of Technology*

Brandon Rosenbluth, *PFM Solutions*

Financial models are more than numbers on a page. They also tell a story about your financial future. That financial story, grounded in concrete facts and analyses, has the potential to drive real change and to create value at an institutional level. This presentation will highlight the value of developing a strategic, multi-year financial model that can strengthen institutional financial management. The speakers will provide their respective experiences on the subject: 1) creating a model and communicating with stakeholders a plan moving forward to help address flattening enrollment growth, and a more advanced tool to present to new executive leadership, 2) evaluating enrollment trends and their impact on strategic plan and accreditation, and 3) a consultant sharing best practices and lessons learned throughout the presentation.

**1.5 CPE Credits, CPE Category: Finance**



# Friday, March 22

10:15–11:30 am



## **Purposeful Collision: Fueling RCM Budgeting With Robust Analytics**

*America North Ballroom*

Mark Anderson, *University of Virginia*

Bill Ashby, *University of Virginia*

Charles Rush, *University of Virginia*

Five years ago, the University of Virginia president announced that the institution would transition to a responsibility center management (RCM) budget model. At that time, both institutionally and across higher education as a whole, the data analytics environment was immature but rapidly developing. Our story, about how one RCM activity center, the Batten School of Leadership and Public Policy at the University, adopted the RCM budget model and built a robust analytics environment to fuel success within it, will provide the backdrop for an engaging conversation about our critical success factors. Strategies developed, decisions made, and resources allocated (people, time, funding) in support of this effort will be detailed through specific examples, including a live demonstration of two analytical dashboards built for the Batten School by University Business Intelligence (UBI). The importance of conducting a thorough readiness assessment before deployment will be emphasized.

**1.5 CPE Credits, CPE Category: Finance**

11:30–11:45 am

## **Refreshment and Check-Out Break**

*America Ballroom Foyer*

Sponsored By:



# Friday, March 22

11:45 am–1:00 pm

## **University-Wide Grants Planning at Tufts University**

*America North Ballroom*

Brian Cody, *Tufts University*

Salvatore Tripoli, *Tufts University*

Stewart Clark, *Kaufman Hall*

A common challenge facing many research institutions is the declining availability of federal funding. To adapt, Tufts has focused on increasing visibility and transparency into prospective financial planning of research portfolios. The Research Administration office partnered with the Office of Budget and Planning to make this information more reliable, timely, and available to the various constituents of the research community. Integrating the systems and training the local administrators has required changes to the workflow of research administration and led to standardization of best practices. Attendees will learn how implementing the Grants Module at Tufts resulted in effective change management through the implementation of a new tool. The audience will understand the collaborative framework needed among constituents, central offices, and technical experts to make change management successful.

**1.5 CPE Credits, CPE Category: Finance**

11:45 am–1:00 pm



## **The Times Have Changed: Real-World Tips and Strategies to Grow Revenue, Increase Enrollment, and Manage Cost**

*America Center Ballroom*

Steve Golding, *Ohio University*

Jim Hundrieser, *Association of Governing Boards*

This interactive, deep-dive session explores a variety of tips, methods, and strategies that can be used to diversify and grow institutional revenue sources, increase enrollments, manage cost, and address other critical business model issues. Special emphasis is placed on the practical development and implementation of these strategies, using actual case studies as a guide. A three-step system (diagnostics, exploration, and implementation) for identifying key strategic growth building blocks will also be discussed. The ideas in this session will help you align institutional mission and strengths with new financial models for prosperity. Attendees will leave with a set of clearly articulated strategies and rationales they can use at their institution, and they will have opportunities to explore actual case studies where these strategies have been implemented with success.

**1.5 CPE Credits, CPE Category: Specialized Knowledge**

# Friday, March 22

11:45 am–1:00 pm

## **LIBOR Is Likely Going Away After 2021. What Should I Be Doing Now to Prepare?**

*St. George CD*

David Hammer, *Lehigh University*

Valarie Allen, *Ballard Spahr LLP*

Readie Callahan, *Wells Fargo*

Banks will no longer be compelled to submit LIBOR bids after 2021, paving the way to terminate the index that serves as a benchmark for over \$350 trillion in products. LIBOR will be replaced by the Secured Overnight Financing Rate (SOFR), a new alternative reference rate published by the Fed. The transition to SOFR will have a wide-ranging impact on derivatives, bonds, commercial loans, private student loans, and mortgages, among others. This discussion will broadly focus on how and why the global financial markets feel compelled to transition away from LIBOR as a viable benchmark, and the impacts to colleges and universities. It will help college and university business officers build a toolkit that can be immediately deployed to help navigate the transition.

### 1.5 CPE Credits, CPE Category: Economics

11:45 am–1:00 pm

## **Creating and Managing Programs at Global Locations**

*St. George AB*

Romayne Botti, *Carnegie Mellon University*

Matt Coley, *Carnegie Mellon University*

Ashley Ferenczy, *Carnegie Mellon University*

Mark Gambone, *Carnegie Mellon University*

Dan Giammatteo, *Carnegie Mellon University*

Participants will gain an understanding of how to create and manage successful programs at global locations. Presenters will expose the audience to different financial models, sponsorships, structures, and cultures, and provide examples of some of Carnegie Mellon's global locations.

### 1.5 CPE Credits, CPE Category: Specialized Knowledge

1:00 pm

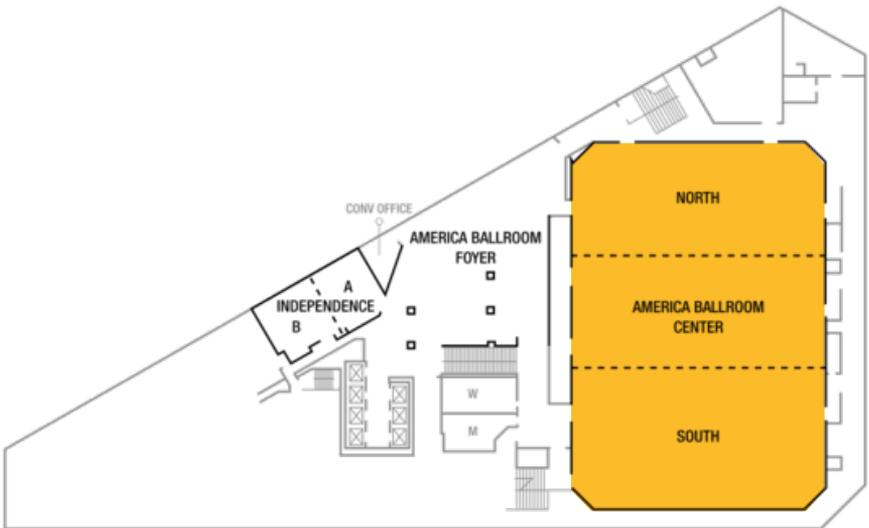
## **Program Adjourns**

# Floor Plan

## THIRD FLOOR



## FOURTH FLOOR





1110 Vermont Ave NW,  
Suite 800  
Washington, DC 20005