



ANNUAL MEETING

Columbus, Ohio
October 1-3, 2017

EXPLORE. EMPOWER. ENRICH.



ABOUT THE ANNUAL MEETING

Greetings from the President of CACUBO!

On behalf of the conference committee, I am very excited to invite you to the 2017 Annual Meeting from October 1st through the 3rd at the Hyatt Regency hotel in downtown Columbus, Ohio. CACUBO has a long history of providing higher education business and finance professionals the environment to learn the latest and most innovative business trends occurring in our field.



Mary LaGrange, CACUBO President

John F. Kennedy said, "Leadership and learning are indispensable to each other." The 2017 Annual Meeting provides multiple opportunities for those two concepts to intertwine. Leadership is evident in the array of presenters who will share their expertise, while learning occurs through the abundant formal and informal opportunities to acquire knowledge and network with others.

The theme of this year's meeting is "Explore, Empower, Enrich." Bringing those words to action, our presenters and attendees will Explore new ideas and concepts together, provide the support to Empower change, and be the culture that will Enrich both professionally and personally.

In the hectic pace of balancing numerous projects and deadlines, the 2017 Annual Meeting is the haven where we will hear from our colleagues from different institutions, listen to nationally known speakers, and engage with vendors, suppliers, and business partners who are industry experts providing solutions. Most importantly, the Annual Meeting is a time to reconnect with long-established peers and have the chance to develop new relationships.

Our meeting this year is located in Columbus, Ohio, and the hotel is part of the Arena District, downtown Columbus' popular neighborhood featuring sports, entertainment, pubs and eateries, and venues for concerts. I know you will enjoy all that the Annual Meeting and the vibrancy of Columbus has to offer!

Please visit CACUBO.org to find the latest information about the 2017 Annual Meeting and other professional development opportunities.

I look forward to seeing you this October in Columbus!

Mary LaGrange, CACUBO President

CACUBO BOARD OF DIRECTORS

President: Mary LaGrange.....*Controller, University of Nebraska-Lincoln*
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Diana Kuhlmann.....*AVP-Finance/Budget Director, Emporia State University*
Mike Volna.....*Associate VP Finance & Controller, University of Minnesota*

2017 ANNUAL MEETING HOST COMMITTEE

Mary LaGrange.....*President, University of Nebraska-Lincoln*
Gregory Deppong.....*First VP, Michigan State University*
Karen Goodwin.....*Host Chair, University of Cincinnati*
Robert Swanson.....*Program Chair, Bowling Green State University*
Hal Jankowski...*2018 Chair, University of Cincinnati, College of Design, Architecture, Art, & Planning*
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Christa Eitel.....*University of Cincinnati*
Jill Yates.....*Southern Illinois University Edwardsville*
Tammy Martin.....*Indiana University-Purdue University Indianapolis*
Mark Volpatti.....*Indiana University-Purdue University Indianapolis*
Gabrielle Bovenzi.....*Indiana University-Purdue University Indianapolis*
Brent Swanson.....*Iowa State University*
Angela Wolgram.....*Emporia State University*
Kent Adams.....*Pratt Community College*
Dave Takehara.....*Northwestern University*
Pat Comley.....*Business Partner Coordinator*

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2017 ANNUAL MEETING PROGRAM COMMITTEE

Mary La Grange.....President, University of Nebraska-Lincoln
Gregory Deppong.....1st VP, Michigan State University
Robert Swanson.....Program Chair, Bowling Green State University
Karen Goodwin.....Host Chair, University of Cincinnati
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Dawn Cordray.....Indiana University-Purdue University
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Karen Banning.....University of Kansas
Sean Carey.....Michigan State University
Walter Branson.....Missouri University of Science & Tech
Lois Tatro.....Wichita State University



The Central Association of College and University Business Officers (CACUBO) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on

the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org. The CACUBO sponsor identification number is 116326.

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour.

HOTEL INFORMATION



Hyatt Regency Columbus

Greater Columbus Convention Center,
350 N High St, Columbus, OH 43215
(614) 463-1234
Group rate: \$174 per room

AIRPORT INFORMATION

From John Glenn Columbus International Airport:

Taxi Estimated \$28 fare | **COTA** Air Connect \$2.75 (one way)

From Bolton Field Airport:

Taxi Estimated \$40 fare | **COTA** Air Connect \$2.75 (one way)

FUTURE PROFESSIONAL DEVELOPMENT EVENTS

September 30 - October 2, 2018
CACUBO Annual Meeting
Chicago, IL

May 21- 22, 2018
Higher Education Accounting Workshop
Omaha, NE

March 22 - 23, 2018
CACUBO Workshop
Cincinnati, OH

July 30 - August 1, 2018
Leadership Institute
Grand Rapids, MI

QUESTIONS

Karen Goodwin, Host Committee Chair
Email: Karen.Goodwin@uc.edu
Phone: (513) 556-5039

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MEALS & RECEPTIONS

Sunday, October 01, 2017 6:30 PM - 10:00 PM

Opening Reception

Monday, October 02, 2017 7:00 AM - 8:00 AM

Business Partners Breakfast & Hot Breakfast for Attendees

Monday, October 02, 2017 11:30 AM - 12:45 PM

Lunch

Monday, October 02, 2017 5:15 PM - 6:15 PM

Business Partner Reception

Tuesday, October 03, 2017 8:00 AM - 9:00 AM

Business Breakfast with John Walda, NACUBO President

Tuesday, October 03, 2017 11:45 AM - 1:00 PM

Lunch

Tuesday, October 03, 2017 3:15 PM - 4:30 PM

Cocktail Reception

EXHIBIT HALL OPEN

Sunday, October 01, 2017 2:15 PM - 4:45 PM

Monday, October 02, 2017 10:30 AM - 12:45 AM

Monday, October 02, 2017 2:00 PM - 3:00 PM

Tuesday, October 03, 2017 9:00 AM - 10:30 AM

REGISTRATION INFORMATION

Please register for the Annual Meeting and make your hotel reservations online from our website at cacubo.org and by clicking on "Annual Meeting" under the Events and Opportunities tab. Hotel reservations made by Monday, September 11, 2017 will automatically receive the special CACUBO group rate. To register and pay by check, please complete the online registration form and print a confirmation of your registration to mail with your check.

MEETING REGISTRATION FEES	CACUBO MEMBERS	NON-MEMBERS	GUEST
Early (On or before 9/11/2017)	\$550	\$725	\$350
Regular (After 9/11/2017)	\$650	\$795	\$350
Day Pass (Sun., Mon. or Tues. only)	\$260	\$260	\$260
Pre-Conference Workshop	\$75	\$75	\$75
Opening Event (not included in Sunday pass)	\$100	\$100	\$100

ANNUAL MEETING REFUNDS

Cancellation requests will be processed by CVENT on the CACUBO registration website. If you wish to substitute another individual contact Brent Swanson at swanie@lastate.edu for more information. Annual meeting registration cancellations received on or before 9/11/2017 are eligible for a refund less a \$100 administrative fee. Registrants canceling after 9/11/2017 and conference no-shows are liable for the full amount due.

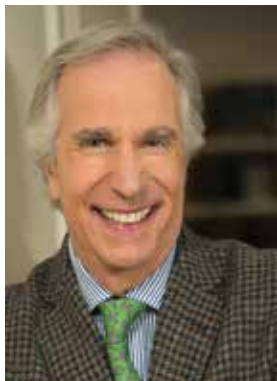
ANNUAL MEETING ATTIRE

Suggested attire for all sessions and meals is casual. Meeting rooms are often cool, so dressing in layers is recommended.

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KEYNOTE SPEAKERS

Henry Winkler



Winkler's portrayal of The Fonz for 10 seasons on the Happy Days made him one of the most recognized actors in the world. He won two consecutive Golden Globes Awards for Best Actor in a Comedy Series and three Emmy Nominations in the same category. He was also honored with a star on the Hollywood Walk of Fame.

At the podium, audiences always leave Henry's presentations inspired and entertained. Groups of all ages learn from Henry's speeches, through humorous anecdotes and inspirational life lessons about overcoming adversity. His passion for supporting others is the result of a lifetime struggle with undiagnosed dyslexia. Henry has worked tirelessly to bring awareness

and support to children who learn differently by advocating for changes on the educational system and informing parents and teachers.

Bonnie St. John



Despite having her right leg amputated at age five, Bonnie St. John became the first ever African-American to win medals in Winter Olympic competition, taking home a silver and two bronze medals in downhill events at the 1984 Paralympics. In recognition of this historic achievement, St. John was quoted on millions of Starbucks coffee cups and was honored at the White House by President George W. Bush.

Today, St. John travels the globe as a leadership consultant, keynote speaker and facilitator for international summit conferences for senior-level executives. She frequently donates personal

appearances to schools, homeless shelters, community groups and other organizations in hundreds of locations while traveling for corporate clients. The celebrated author of six books travels around the world, with her daughter, fascinating women leaders, women's rights activists, and many more.

KEYNOTE SPEAKERS

Mel Robbins



Mel Robbins is best known for delivering one of the most popular TED Talks in the world: "How To Stop Screwing Yourself Over". Mel is a powerful keynote speaker who jumps into the audience, creating motivational experiences with unforgettable engagement, surprising research, vivid imagery, original videos and music.

When she's not on stage, Mel is on TV or trending on social media for her captivating analysis about the biggest stories of our time. She's an award-winning on-air analyst for CNN and drives millions of page views for CNN.com as one of their most prolific opinion writers. She's been named "America's Outstanding Talk Show Host" by The Gracie Awards and has

hosted original shows for A&E, Fox, and Cox Media. She's appeared as an expert on a wide range of talk shows, from Oprah to Dr. Phil, Fox News to Good Morning America.

David Harrison



David Harrison became the fifth president of Columbus State Community College in July 2010. Columbus State is one of the largest and most comprehensive colleges in Ohio. It provides more online learning opportunities than any other college in the state, and contributes nearly a billion dollars in regional economic impact.

Under Dr. Harrison's leadership, Columbus State has led the region in expanding access to affordable bachelor's degrees through innovative university 2+2 partnerships. David led the formation of The Central Ohio Compact, a regional strategy among K-12 and higher education leaders to help more students succeed in college and in the workplace. In 2012,

Columbus State was named an Achieving the Dream college and in 2015 received Achieving Dream's esteemed designation as a Leader College.

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PROGRAM AT A GLANCE

Saturday, September 30, 2017

Pre-Conference Workshops

Sunday, October 01, 2017

Keynote Speaker	Bonnie St. John, leadership consultant, keynote speaker and facilitator for international summit conferences				
Concurrent Sessions #1	What Happened & Where Are We Now?	Finding Your "Sweet Spot" of Financial Sustainability Given Today's Changing Demographics	Legal Issues Higher Ed Can't Ignore: Trump, Title IX, Technology and More	The Realities of Mentoring and Coaching for Leaders in Higher Education	Budget & Finance Data Analytics
Concurrent Sessions #2	Athletics and the IRS	Taking Control of the Discounting Process	Using Real Estate to Support the Mission of Your College or University	Best Practices Winner	The Future of Payments & the Millennial Impact

Monday, October 02, 2017

Keynote Speaker	David T. Harrison, president of Columbus State Community College				
Concurrent Sessions #3	Form 990T Challenges and Opportunities	Enterprise Risk Management (ERM for Business Officers)	P3 Perspectives: Three Universities... Three Different P3 Models	Increase Employee Engagement Without a Budget	Campus Security: Protecting Your Most Important Assets
Keynote Speaker	Mel Robbins, American on-air CNN commentator, television host, life coach, author, motivational speaker, contributing editor for Success.				
Concurrent Sessions #4	Keeping Up with the GASB	Student Success: It's a Matter of Life and Death	Model for Reconciling Competing Demands Between Faculty and Administrative Governance	Simplifying Complex Data Using Tableau: Storytelling with Data Visualization	Preventing Consumer Protection Problems

Tuesday, October 03, 2017

Keynote Speaker	Henry Winkler, American actor, director, comedian, producer, and author				
Concurrent Sessions #5	What the New Revenue Recognition Standards Mean for Your Institution	Generation Z Preferences and Student Experience Design Implications	Understanding Academic Program Costs and Margins	Emotional Intelligence as a Productivity Enhancer Part 1	Construction Contract Analytics & Risk Mitigation
Concurrent Sessions #6	Planned Giving & Endowment Fund Reporting	From Incremental to Performance: A College Budgeting Story at the University of Minnesota	The Challenging Landscape for Higher Education Global Engagement: Regulation, Compliance and Risk Management	Emotional Intelligence as a Productivity Enhancer Part 2	Making the Budget Fit

CACUBO 2017

PROGRAM SCHEDULE

Saturday, September 30, 2017

Pre-conference workshops

1:00 - 4:00	TIAA CREF - "Building Your Brand, Building Your Career"
1:00 - 4:00	NACUBO ECONOMIC MODEL

Sunday, October 01, 2017

9:00 - 11:00	Fun Run / Walk
1:00 - 2:15	ANNUAL Meeting Opening Session Keynote Session 1 - Bonnie St. John
2:15 - 4:45	Exhibit Hall Opening
2:15 - 3:15	Showcase #1
3:30 - 4:30	Concurrent Sessions #1 & Showcase #2
4:30 - 4:45	Information Exchange - Break
4:45 - 5:45	Concurrent Session #2
5:45 - 6:30	First time attendees reception
6:30 - 10:00	Opening Reception

Monday, October 02, 2017

7:00 - 8:00	Business Partners Breakfast & Hot Breakfast for Attendees
8:00 - 9:15	Keynote Session 2 - David T. Harrison
9:15 - 9:30	Information Exchange - Break
9:30 - 10:30	Constituency Sessions & Showcase 2A
10:30 - 11:30	Exhibit Hall Open - Showcase #3A and #3B
11:30 - 12:45	Lunch in Exhibit Hall
12:45 - 2:00	Keynote Session 3 - Mel Robbins
2:00 - 3:00	Exhibit Hall Open - Showcase #4
3:00 - 4:00	Concurrent Sessions #3
4:00 - 4:15	Information Exchange - Break
4:15 - 5:15	Concurrent Sessions #4
5:15 - 6:15	Business Partner Reception

Tuesday, October 03, 2017

8:00 - 9:00	Business Breakfast with John Walda, NACUBO Pres
9:00 - 10:30	Exhibit Hall Open
10:30 - 11:30	Concurrent Sessions #5
11:45 - 1:00	Lunch
1:00 - 2:00	Concurrent Sessions #6
2:00 - 2:15	Networking
2:15 - 3:15	Closing Keynote Session - Henry Winkler
3:15 - 4:00	Book signing reception
3:15 - 4:30	Cocktail Reception



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PRE-CONFERENCE

Saturday, September 30, 2017 1:00 PM - 4:00 PM

Building Your Brand, Building Your Career

Learning Objectives:

1. Discover the importance of connection.
2. Identify, assess, explore and practice connection skills.
3. Create simple routines that lead to better connection.
4. Discover a step-by-step process for building leadership capability.
5. Explore the methods, tools, communications, & processes a well-run talent strategy includes.
6. Begin to build a series of development experiences for your future leaders.

Session Description:

Connect to Lead: In a world that seems evermore impersonal, it is critical that leaders find ways to actively deepen their relationships with others especially those we lead. Great leaders are great connectors. In this workshop we'll explore how to build and strengthen relationships with constituents by developing skills that enable better and deeper relationships.

Building Your Leadership Pipeline: It is clear that we are at a turning point in higher education. A generation is retiring (or about to) and a generation is clamoring for more opportunity. The future success of the institution, especially the business office, depends upon getting the next generation leaders ready. This session introduces how to put the pieces in place in order to accelerate the development of leaders at all levels.

CPE Information:

Delivery Method: Group-Live

Subject Area: HR/Personnel

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 3 hours

PRE-CONFERENCE

Saturday, September 30, 2017 1:00 PM - 4:00 PM

Implementing NACUBO's Economic Sustainability Framework

Learning Objectives:

1. Identify key metrics to monitor institutional economic health.
2. Examine an institution's economic model, delineating key parameters
3. Strategies for engagement with colleagues in meaningful dialogue about opportunities for institutional innovation.

Session Description:

At the conclusion of Phase 1 of the Economic Models Project, NACUBO will have created a website toolkit to assist college and university leaders in assessing and transforming their institutions' business models. Part 1 will focus on how institutions might implement the tools and describe some of the success and challenges colleges have had in overcoming the traditional higher education barriers to innovation and implementing structural and cultural change.

CPE Information:

Delivery Method: Group-Live

Subject Area: Business Management & Organization

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 3 hours

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Accounting, Audit, and Tax

Sunday, October 01, 2017 3:30 PM - 4:30 PM

Session #1

101: OMB's Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards (Uniform Guidance) - What Happened and Where are We Headed?

Presenters: David Kelley, CPA, Senior Manager, Baker-Tilly
Ryan Engelstad, CPA, Partner, Baker-Tilly
Rebekah Martin, CPA, Partner, Baker-Tilly

Session Description:

This session will cover Uniform Guidance and the changes that occurred for the attendees related to the way they manage their Federal Awards and changes required of auditors. There will be extended discussion on the changes that occurred related to sub-recipient monitoring and will occur related to procurement under Uniform Guidance. There will also be a brief review of the Student Financial Assistance (Federal Student Aid) and Research and Development compliance supplements that auditors use to provide valuable information for the attendees as they prepare for their upcoming single audits.

CPE Information:

Delivery Method: Group-Live

Subject Area: Accounting/ Government

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hour

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SESSION CATALOG

Sunday, October 01, 2017 4:45 PM - 5:45 PM

Session #2

201: Athletics and the IRS

Presenters: Carol LaLonde, Senior Tax Manager, Plante Moran
Beth Powers, Tax Manager, Michigan State University
Julie Denomme, Director of Tax Management, Wayne State University

Session Description:

Please join us for a panel discussion with several institutions who recently were audited by the IRS. Learn about the issues that were identified and what corrective action has been taken to address these issues going forward. In addition, the panel will discuss the tax complexities that can arise with athletics and how to navigate the cultural challenges of bringing tax to the discussion.

CPE Information:

Delivery Method: Group-Live

Subject Area: Taxes

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hour

SESSION CATALOG

Monday, October 02, 2017 3:00 PM - 4:00 PM

Session #3

301: Form 990T Challenges and Opportunities

Presenters: Karen Gries, CPA, Principal, Clifton Larsen Allen
Shari Meyer, Payroll & Tax Manager, Carleton College

Session Description:

Network with your colleagues in an open forum discussion of 990-T reporting challenges and opportunities associated with unrelated business income reporting on the federal and related state filings. This session will highlight both campus activities such as facility rentals, summer camps, etc., but also dive into the complexities associated with alternative investments and more.

CPE Information:

Delivery Method: Group-Live

Subject Area: Taxes

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hour

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SESSION CATALOG

Monday, October 02, 2017 4:15 PM - 5:15 PM

Session #4

401: Keeping Up With the GASB

Presenters: Charles Tegen, AVP Finance, Clemson University
Tom Ewing, Director of Financial Reporting, Ohio State University

Session Description:

Are you ready for the most recent financial reporting changes for public higher education institutions? This session will provide and update on the standards recently approved or currently being considered by the Governmental Accounting Standards Board. Each topic will be discussed with practical approaches offered in reviewing, implementing and communicating changes at your institution.

CPE Information:

Delivery Method: Group-Live

Subject Area: Accounting/ Government

Prerequisite: None

Knowledge Level: Update

Recommended CPE: 1 hour

SESSION CATALOG

Tuesday, October 03, 2017 10:30 AM - 11:30 AM

Session #5

501: Change Has Come! What the New Revenue Recognition Standards Mean For Your Institution

Presenters: Colleen Guillen, CPA, Manager, Rubin Brown
Kris Pace, Controller, Rockhurst University

Session Description:

Change is coming! New revenue recognition rules will take effect for the higher education industry starting as early as 2018. Higher education will face unique challenges with applying these rules to their financial reporting given the variety of different revenue streams common in the industry. Come join Rubin Brown and Rockhurst University as we explore how these rules will impact your institution. We will collaboratively unravel what these changes really boil down to from both an auditor and practitioner perspective.

CPE Information:

Delivery Method: Group-Live

Subject Area: Accounting

Prerequisite: None

Knowledge Level: Update

Recommended CPE: 1 hour

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Tuesday, October 03, 2017 1:00 PM - 2:00 PM

Session #6

601: Planned Giving & Endowment Fund Reporting

Presenter: Vicki VanDenBerg, Partner, Plante Moran

Session Description:

This session will focus on a refresher on planned giving gifts, specifically split interest agreements and bequests, and how to record internally and then also on the audited financial statement. A look at what the future brings to that reporting with new GASB's as well as the new FASB reporting model. Finally, we will take a look at how planned giving and split interest agreements impact your endowment funds and how best to work with development staff on communicating the impact on endowment funds

CPE Information:

Delivery Method: Group-Live

Subject Area: Accounting

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hour



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Business of Higher Education

Sunday, October 01, 2017 3:30 PM - 4:30 PM

Session #1

102: Finding Your "Sweet Spot" of Financial Sustainability Given Today's Changing Demographics

Presenters: Beth Reissenweber, Ph.D VP F&A, Augsburg College
David English, CFA CFO, Denison University,
David Gingerella, VP Finance and Administration and CFO, Rhode Island College
Christine Smith, Principal, Baker Tilly

Session Description:

Building financial sustainability in a world of changing demographics requires deep investment in financial aid, student support services, and flexibility in prioritizing and managing limited resources. The panel will examine current challenges and solutions that have promoted greater stability and improved fiscal financial position while serving a more diverse student body. Given issues from the audience, and prompted by the moderator, the panelists will discuss challenges on the horizon and tools to find the "Sweet Spot" for building financial sustainability at their institutions. Leveraging community support and institutional shared services will also be discussed as a means for creative solutions to serving students, while managing costs.

CPE Information:

Delivery Method: Group-Live

Subject Area: Finance

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hour

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SESSION CATALOG

Sunday, October 01, 2017 4:45 PM - 5:45 PM

Session #2

202: Taking Control of the Discounting Process

Presenter: Tim Deitz, CFO, Greenville College

Session Description:

The presenter will discuss and present spreadsheets developed to assist Greenville College in strategically using the discount to work for the institution eliminating the reliance on external resources. Partnerships with Academics, Sports, and Financial Aid areas are integral to the success of the process. The presenter will show the audience how they can make strategic decisions in the matrix of discounting which will benefit their respective institutions.

CPE Information:

Delivery Method: Group-Live

Subject Area: Finance

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hour

SESSION CATALOG

Monday, October 02, 2017 3:00 PM - 4:00 PM

Session #3

302: Enterprise Risk Management (ERM for Business Officers)

Presenters: Bill Powell, CPA, Principal, Arthur Gallagher

Elizabeth Carmichael, Principal, Carmichael Associates LLC.

Session Description:

Use your leadership skills in helping your institution understand the positive side of Enterprise Risk Management (ERM) as well as hazards and threats. This presentation will provide an overview of ERM, why it is important to all institutions, and how it can apply to the roles and responsibilities of a business officer. Whether you are a risk owner, managing the risks of talent management, deferred maintenance or enrollment; reporting to the Board on opportunities and threats; or leading an Enterprise Risk Management Team, understanding the key elements of Enterprise Risk Management is a critical element to a successful operation.

CPE Information:

Delivery Method: Group-Live

Subject Area: Specialized Knowledge

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hour

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SESSION CATALOG

Monday, October 02, 2017 4:15 PM - 5:15 PM

Session #4

402: Student Success: It's a Matter of Life and Death

Presenter: Morris Beverage, President, Lakeland Community College

Session Description:

Open access colleges are on the front lines of a battle. We serve a growing number of students who come to us from a position of disadvantage, yet decades of research show that these students are unlikely to succeed in reaching their academic goals. How might colleges position themselves to meet the increasing demands of these students at a time of diminishing resources? This session will paint a complex portrait of students whose academic success is impacted by interacting factors such as socioeconomic status, poverty, toxic stress, and health. Implications for your institution will be discussed.

CPE Information:

Delivery Method: Group-Live

Subject Area: Specialized Knowledge

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hour

SESSION CATALOG

Tuesday, October 03, 2017 10:30 AM - 11:30 AM

Session #5

502: Generation Z Preferences and Student Experience Design Implications

Presenter: Salli Darden, VP Marketing & Communications, Chartwells Higher Education Division

Session Description:

With a lifelong ability to be connected through social channels, Generation Z is both compelled to be a part of their digital community, but also have a desire for live social connection. This session will include key insights such as this, regarding the food, service, amenity and natural flow of daily life preferences of this generation, and their potential impact and opportunities for on-campus innovation. We will discuss topics such as an expectation of personally-curated content which flows effortlessly through their one-click life, and preferences for high-street retail, placed through predictive analytics precisely in their natural on-campus path.

CPE Information:

Delivery Method: Group-Live

Subject Area: Marketing

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hour

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Tuesday, October 03, 2017 1:00 PM - 2:00 PM

Session #6

602: From Incremental to Performance: A College Budgeting Story at the University of Minnesota

Presenters: Ryan Warren, CFO/COO

Nathan Kopka, Data Analyst

Gail Renteria, Finance Director, College of Education & Human Services

Session Description:

The College of Education and Human Development at the University of Minnesota spent two years engaged with a faculty committee to move from an incremental budgeting model to a performance-based budgeting model. This new model was developed to address two over-arching goals: To provide transparency to the collegiate budgeting process with departments and to provide departments with an allocation based on measurable activity. We will review our process, the model and lessons learned in moving between budget models.

CPE Information:

Delivery Method: Group-Live

Subject Area: Finance

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hour



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Business of Higher Education Part Deux

Sunday, October 01, 2017 3:30 PM - 4:30 PM

Session #1

103: Legal Issues Higher Ed Can't Ignore: Trump, Title IX, Technology and More

Presenters: Hayley Hanson, Partner & Higher Education Group Leader, Husch Blackwell

Martin Loring, Partner, Husch Blackwell

Session Description:

After just one week in office, President Trump served notice to the higher education community that things would be different for colleges and universities nationwide. As just one example, his immigration order immediately affected every school with international students, faculty or staff. Our presentation will help administrators understand and navigate this highly fluid political environment. We will discuss how current and anticipated policy changes will affect administrators' responsibilities, from the decisions of the new Secretary of Education, to new priorities of the Office of Civil Rights, to changes in key regulations and accreditation standards. The panel will help map out the regulatory minefield to inform policies and procedures going forward.

CPE Information:

Delivery Method: Group-Live

Subject Area: Specialized Knowledge

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hour

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SESSION CATALOG

Sunday, October 01, 2017 4:45 PM - 5:45 PM

Session #2

203: Using Real Estate to Support the Mission of Your College or University

Presenter: Brian Carroll, VP for Public Institutions, JLL
Steve Krakoff, VP for Capital Planning & Campus Operations, Bowling Green State University
Amanda Hoffsis, Senior Director of Planning and Real Estate, Ohio State University
Vennie Gore, VP for Auxiliary Enterprises, Michigan State University

Session Description:

How can real estate support the mission of your college or university? Participants will walk away with specific tactics they can take to begin to leverage their real estate more strategically to improve town/gown relations, recruit and retain top students, faculty and their families, and more effectively invest in the greater community. It will also give insights into the role that real estate plays in a P3 with four universities sharing their best practices and lessons learned through the strategic use of real estate.

CPE Information:

Delivery Method: Group-Live

Subject Area: Specialized Knowledge

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hour

SESSION CATALOG

Monday, October 02, 2017 3:00 PM - 4:00 PM

Session #3

303: P3 Perspectives: Three Universities...Three Different P3 Models

Presenters: John Wendling, SVP, Blue Rose Capital Advisors
Diana Goode, Senior Associate, VP for Finance, Treasury and Budget, Wayne State University
Sherideen Stoll, CPA, CFO and VP Finance and Administration, Bowling Green State University
Bruce Arick, VP Finance & Administration, Butler University

Session Description:

This moderated panel discussion will delve into why three prominent universities utilized three different public-private partnership (“P3”) financing models to deliver student housing projects on their campuses. The panelists will be asked about and share why their P3 model selection proved to be a good fit, how objectives were set to drive the decision-making processes and examine outcomes. Participants will observe three different perspectives and learn how, by implementing a P3 solution, creative financing methods can be utilized to overcome university constraints – including time and capital resources – and focus precious resources on the core institutional mission.

CPE Information:

Delivery Method: Group-Live

Subject Area: Finance

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hour

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SESSION CATALOG

Monday, October 02, 2017 4:15 PM - 5:15 PM

Session #4

403: Model for Reconciling Competing Demands Between Faculty and Administrative Governance

Presenters: Pat O'Neil, MPA, CHCA Director of Finance & Administration, College of Allied Health Professions, University of Nebraska Medical Center
Kyle Meyer, Ph.D, MS, PT, FASAHP Founding Dean of the College of Health Professions, University of Nebraska Medical Center

Session Description:

The preeminence of fiscal and compliance considerations as the dominant forces shaping strategic and management practices in higher education has resulted in a perceived or actual decline in the historic role of faculty in university governance, and a concomitant tension between faculty and administration. To address the competing demands between faculty and administrative governance one Midwest college at an academic health science center implemented a collaborative governance structure, based on the concepts of shared consciousness and empowered execution as described in Stanley McCrystal's book, "Team of Teams." This presentation examines antecedents of the structure, describes implementation, and offers initial assessments.

CPE Information:

Delivery Method: Group-Live

Subject Area: Administrative Practice

Prerequisite: None

Knowledge Level: Basic

Recommended CPE: 1 hour

SESSION CATALOG

Tuesday, October 03, 2017 10:30 AM - 11:30 AM

Session #5

503: Understanding Academic Program Costs and Margins

Presenter: Casey Chapman, Director of Management Consulting, RSM U.S. LLP

Session Description:

Higher education institutions struggle to identify and gain agreement on the financial margins or financial contributions of various academic programs and departments. Since 70 to 80 percent of the total costs of an institution are related to faculty and staff or personnel costs, determining academic program costs and margins is crucial. Making strategic and well-informed decisions—and engaging faculty and other stakeholders in finding appropriate solutions—requires real data and a clear understanding of an institution's cost profile.

CPE Information:

Delivery Method: Group-Live

Subject Area: Finance

Prerequisite: None

Knowledge Level: Basic

Recommended CPE: 1 hour

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Tuesday, October 03, 2017 1:00 PM - 2:00 PM

Session #6

603: The Challenging Landscape for Higher Education Global Engagement: Regulation, Compliance and Risk Management Practices

Presenter: Margaret Tungseth, VP for Finance & Administration,
Hamline University

Joan Rugar, Area Senior VP, Arthur J. Gallagher & Co.

Session Description:

Challenges facing sustainability, enrollment and a competitive landscape in higher education have brought many institutions to the same solution; global expansion must happen. In order to attract the best faculty and researchers as well as a balanced student population, a robust global offering is essential. These opportunities bring a new challenge of compliance and regulation that fall outside of safety and security.

Please join us as we explore current trends in study abroad compliance and regulation, the importance of developing a checklist for vetting an international location/partner/third party provider, and protocols/best practices to mitigate risk for current and future global relationships.

CPE Information:

Delivery Method: Group-Live

Subject Area: Specialized Knowledge

Prerequisite: None

Knowledge Level: Update

Recommended CPE: 1 hour



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Management, HR, Technology, Data

Sunday, October 01, 2017 3:30 PM - 4:30 PM

Session #1

104: The Realities of Mentoring and Coaching for Leaders in Higher Education

Presenter: Thresette Briggs, Adjunct Professor, IUPUI School of Engineering and Technology, Owner and Chief Performance Officer, Performance 3, LLC.

Session Description:

As each year passes mentoring and coaching gain more popularity for leadership development, with organizations investing millions to shift toward mentoring and coaching cultures. Having mentored and coached leaders for over 20 years I can attest that they add value. And studies from credible sources like the Association for Talent Development (ATD), Harvard Business Review and Society for Human Resource Management (SHRM) support their effectiveness. But while coaching and mentoring can add real value to leadership performance in higher education, the industry does not fully utilize either to develop its talent. This session will delve into the pros, cons and lessons learned regarding coaching and mentoring.

CPE Information:

Delivery Method: Group-Live

Subject Area: HR/Personnel

Prerequisite: None

Knowledge Level: Basic

Recommended CPE: 1 hour

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SESSION CATALOG

Sunday, October 01, 2017 4:45 PM - 5:45 PM

Session #2

204: Best Practices Winner

Session Description and Objectives:

Best practices winner

SESSION CATALOG

Monday, October 02, 2017 3:00 PM - 4:00 PM

Session #3

304: Increase Employee Engagement Without a Budget

Presenter: Kevin Szlagowski, Area Executive VP, Arthur J. Gallagher & Co.

Session Description:

Employee engagement has become a top issue on the minds of business leaders. Studies show that having a highly engaged workforce can reduce turnover and hiring costs, ensure performance growth, improve productivity, and increase job satisfaction. Identifying resources within an organization to drive employee engagement (human and financial), however, can prove both challenging and expensive. One successful initiative is to outsource this function to a company with a proven model for success. In our environment today, implementing employee engagement strategies successfully requires innovative methods to fund these initiatives.

CPE Information:

Delivery Method: Group-Live

Subject Area: HR/Personnel

Prerequisite: None

Knowledge Level: Basic

Recommended CPE: 1 hour

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SESSION CATALOG

Monday, October 02, 2017 4:15 PM - 5:15 PM

Session #4

404: Simplifying Complex Data Using Tableau: Storytelling with Data Visualization

Presenter: Christa Eitel, Business Officer, College of Education, Criminal Justice and Human Services, University of Cincinnati
Regina Krahenbuhl, Data Analyst, College of Education, Criminal Justice and Human Services, University of Cincinnati

Session Description:

Using data to make decisions in a Responsibility Centered Budgeting System - The integration of Tableau within in the College of Education, Criminal Justice, and Human Services at the University of Cincinnati has led to enhanced decision making. This session will review how the College of Education started from excel spreadsheets, combined multiple data sources, and developed a system that increases understanding and action. The presentation will consist of dashboards on enrollment, faculty teaching loads, and cross college courses and will provide specific examples of actions taken from these dashboards.

CPE Information:

Delivery Method: Group-Live

Subject Area: Business Management and Organization

Prerequisite: None

Knowledge Level: Basic

Recommended CPE: 1 hour

SESSION CATALOG

Tuesday, October 03, 2017

Part 1: 10:30 - 11:30 AM

Part 2: 1:00 PM - 2:00 PM

Session #5 & 6

504 (Part 1) & 604 (Part 2): Emotional Intelligence as a Productivity Enhancer

Presenter: Jerome Jewell, Founder and President, Jewell Consulting Group

Session Description:

A combined presentation/interactive discussion focused on practical application of Emotional Intelligence (EI) to challenges in the university workplace. After a brief review of the key components of Dr. Daniel Goleman's framework for EI, specific examples of how EI can accelerate and enrich conflict resolution will be explored. Additionally, the presenter will facilitate a discussion of a relevant case study engaging attendees in addressing a "live" workplace challenge.

CPE Information:

Delivery Method: Group-Live

Subject Area: HR/ Personnel

Prerequisite: None

Knowledge Level: Basic

Recommended CPE: 1 hour per session

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Parts and Pieces

Sunday, October 01, 2017 3:30 PM - 4:30 PM

Session #1

105: Budget and Finance Data Analytics

Presenters: Michael D'Agostino, Manager, RSM U.S. LLP

Diana Cline, Budget Director, Northern Virginia Community College

Session Description:

In today's ever-increasing competitive environment, colleges and universities require unprecedented access to information to perform managerial analysis and make informed decisions. Organizations need the ability to combine data from multiple sources to create management reports, exception reporting, conduct analytics, and provide ad-hoc analysis for strategic planning purposes. Diana Cline, Budget Director at Northern Virginia Community College (NOVA) and Mike D'Agostino, Business Intelligence Manager at RSM US LLP, will review how NOVA improved the effectiveness and efficiency of data analysis for core business functions by creating a centralized data foundation that can be utilized by off-the-shelf software tools for reporting, analysis and planning.

CPE Information:

Delivery Method: Group-Live

Subject Area: Finance

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hours

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SESSION CATALOG

Sunday, October 01, 2017 4:45 PM - 5:45 PM

Session #2

205: The Future of Payments and the Millennial Impact

Presenters: James Lock, Senior Treasury Services Director for Higher Education, JPM

Greg Deppong, Controller, Michigan State University

Chris Moore, Director of Cash and Investments, Ball State University

Session Description:

Checks continue to be the most prevalent form of payment, but replacement with electronic alternatives continues and may be gaining momentum in coming years due to demographic changes. Millennials (or Generation Y) include those born between 1980 and 2000, comprise the majority of students at colleges and universities today and are projected to be 75% of the workforce by 2030. Millennials have embraced digital technology and non-traditional banking options at a higher rate than their predecessors. Hear what payment technologies your peers are implementing to better connect with their students, vendors and employees.

CPE Information:

Delivery Method: Group-Live

Subject Area: Specialized Knowledge

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hours

SESSION CATALOG

Monday, October 02, 2017 3:00 PM - 4:00 PM

Session #3

305: Campus Security: Protecting Your Most Important Assets

Presenters: William Kowalski, Principal and Director of Operations, Rehmann Corporate Investigative Services

R. Gavin Leach, VP for Finance and Administration, Northern Michigan University

Session Description:

If the next victim is one of your students, did you do everything in your power to protect them? William J. Kowalski, former FBI counter-terrorism specialist and head of Rehmann Corporate Investigative Services, asks higher education institutions to develop a healthy sense of "what if." Whether it is data security, identifying sexual predators or protecting assets from embezzlers and fraud, higher education personnel are the key to prevention and protection. Using real-life examples and alarming statistics, he will provide insight and key steps higher education institutions can take to protect their most important assets.

CPE Information:

Delivery Method: Group-Live

Subject Area: Specialized Knowledge

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hours

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SESSION CATALOG

Monday, October 02, 2017 4:15 PM - 5:15 PM

Session #4

405: Preventing Consumer Protection Problems: Clarifying Student Borrower Expectations, Responding to Enforcement Trends, and Supporting Loan Repayment

Presenters: Hayley Hanson, Partner and Higher Education Group Leader, Husch Blackwell
Anne Cartwright, Partner, Husch Blackwell

Session Description:

Students and federal watchdogs look to shift responsibility for student loan borrower consumer protections to colleges and universities. Do you understand regulatory expectations surrounding disclosures, collection, and oversight of third-parties in the area of student debt repayment? Explore institutional obligations related to debt collection, including those under the Fair Debt Collection Practices Act, the Telephone Consumer Protection Act, fee and cost assessment regulations, and Consumer Financial Protection Bureau and U.S. Department of Education guidance. Learn to develop key provisions for loan disclosures and agreements that clarify expectations. And examine changing enforcement trends and developing regulatory programs supporting repayment.

CPE Information:

Delivery Method: Group-Live

Subject Area: Administrative Practice

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hours

SESSION CATALOG

Tuesday, October 03, 2017 10:30 AM - 11:30 AM

Session #5

505: Construction Contract Analytics and Risk Mitigation

Presenters: Robert Zellmer, CCA, Manager, Baker Tilly

Session Description:

Construction projects represent some of the most significant and high-profile expenditures for higher education institutions. Effective contract analysis can reduce the risks of project overruns, fraud, and abuse. This presentation will address how to analyze a construction contract to identify favorable or unfavorable pricing provisions, contract omissions, potential financial control issues as well as controls or actions necessary to mitigate contract risk.

CPE Information:

Delivery Method: Group-Live

Subject Area: Specialized Knowledge

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hours

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Tuesday, October 03, 2017 1:00 PM - 2:00 PM

Session #6

605: Making the Budget Fit

Presenters: Thomas M. Ridout, Executive Director of Finance,
Northeast Iowa Community College

Session Description:

The participants will see how models, scenarios, and financial projections are created. It assist them in using historical financial data from your general ledger in creation of the projections. How data analytics can assist in creation of scenarios for management decisions. See the impact of decision on fund balances. Methods and data used in strategic initiative within the college planning processes. Ways to communicate financial pictures in easy to understand methods.

CPE Information:

Delivery Method: Group-Live

Subject Area: Finance

Prerequisite: None

Knowledge Level: Overview

Recommended CPE: 1 hours



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CACUBO

CACUBO MISSION

CACUBO serves higher education business and finance professionals by providing opportunities for professional and personal development and facilitating collegial relationship and networks resulting in improved management within our member institutions. CACUBO promotes ethical behavior, innovation and through our relationships with NACUBO, advocacy for higher education.

CACUBO DIVERSITY STATEMENT

CACUBO recognizes the benefits of cultural diversity in the workplace and encourages and promotes diverse and multicultural participation.