CBMI 2022 Faculty Bios, Photos, and Course Descriptions

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Jimmy Barnes

Biography
Jimmy Barnes is a Senior Lecturer in the School of Accountancy at Clemson University. He has worked at Clemson for over ten years where he has served as the Business Officer for the College of Business and Behavioral Science and the Financial Planning and Analysis Officer for Academic Affairs. In his current role he teaches courses in data analytics, emerging technology in accounting, and accounting ethics. He also works with admissions for Clemson's Master of Professional Accountancy Program. Prior to coming to Clemson, he served as the Controller for Erskine College for six years. Jimmy worked in public accounting for six years with Deloitte and Touche and McKinley, Cooper & Co. in Greenville, SC.

Jimmy holds an undergraduate degree in accounting from Winthrop University and a Masters in Accountancy from The University of Georgia. He is a certified public accountant and a chartered global management accountant. He is the current Treasurer for SACUBO. He is a 2008 graduate of the College Business Management Institute.

Course Description
Higher Education Analytics
Technology is advancing at a rapid rate. Massive amounts of data are being generated, stored, used, and analyzed. Business Officers are no longer charged with routine tasks and processes but expected to understand data—how it is created, collected, stored, accessed, and used. Business Officers and other higher education professionals must be able to adequately safeguard this data as well as work with it, think critically about the story it is telling, and use it to make better decisions. Thus, it is critical that all individuals in higher education become comfortable with large data sets and various technologies.

Course objectives:
- Introduce participants to the different technologies that are being used to capture data, evaluate data, make decisions, and report on the information.
- Explore the different ways higher education departments are currently evaluating data.
- Challenge participants to think about other opportunities to utilize data for decision making.

Mark Briggs

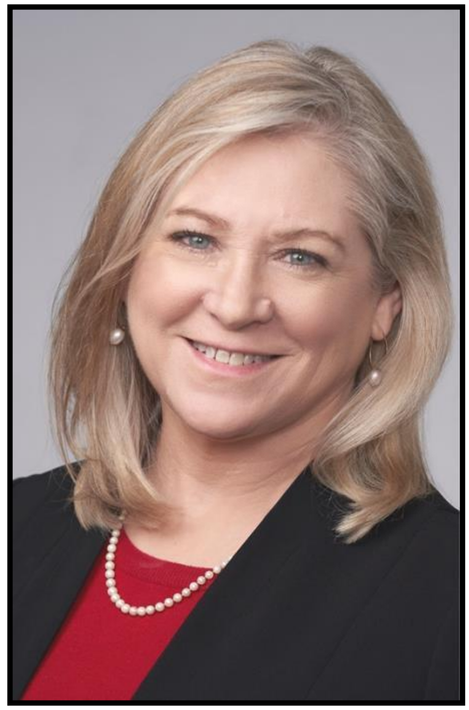
Biography
Mark Briggs serves as the lead advisor for Safety Management Resources Corporation (SMRC), a full-service consulting firm supporting their clients through the delivery of world-class risk management, safety, emergency management, and business continuity services.
Mark served as the Risk Manager for the University of Illinois and as the Chief Risk Officer for Ohio State University prior to assuming his consulting role where he supports the efforts of colleges and universities around the world. He also serves as an adjunct faculty member in Illinois State University's safety degree program and routinely works with FEMA, the Department of Homeland Security, and other Federal Agencies and higher education associations in the development and delivery of educational programs.

Mark is a frequent keynote and session speaker for associations, corporations, and governmental agencies where he delivers educational, captivating, motivational, and just-plain-fun programs that participants remember and incorporate into their own professional world.

Course Descriptions
Enterprise Risk Management (ERM): Engaging the Entire Campus Community
Enterprise Risk Management (ERM) has been discussed by boards, administrators, and support staff throughout higher education for several years. However, few institutions have adopted a truly integrated approach designed to enhance the identification and management of the risks they face and the opportunities which still too-often pass them by.

This session will introduce the benefits of adopting an Enterprise Risk Management (ERM) system that will ensure the ability to effectively identify and address risks and opportunities. The principles discussed in this session are relevant and ready to be put into place regardless of your role or the size and type of your institution.

Insurance and Risk Management
Educational institutions face an incredible array of events that can lead to serious financial loss. This course will present the model for identifying and evaluating these risks of loss and determining how to manage them. Topics include risk assessment, essential loss control (safety) practices, and risk transfer through insurance and other means. Participants will gain a basic understanding of risk management and insurance including how to purchase insurance and to use insurance providers' loss control and claims services to the institution's advantage.



Eileen Kennedy Byrne

Biography
After 30 years in higher ed, Eileen Kennedy Byrne joined the development advisory and program management firm Brailsford & Dunlavey as Senior Consultant where she focuses on assisting colleges and universities in the development and implementation of public-private partnerships (P3s). She has managed the university-related real estate development process from concept through long-term operations. Eileen brings a university perspective to forming innovative, multisector collaborations and understanding of the complexities navigating P3s. In her various roles, she managed over $250 million of financing through bond issuance, bank lending, and capital leasing and has developed $400 million of capital projects.

Before joining B&D, Eileen was President & CEO of the University of New Orleans (UNO) Research and Technology Foundation, overseeing a portfolio of office, laboratory and conference facilities in the UNO Research and Technology Park. Prior to that appointment, she served as Vice President & CFO of the UNO family of affiliated foundations. Eileen previously held several positions at UNO including Assistant Vice Chancellor for Property and Facilities Development and Assistant Vice Chancellor for Business Affairs.

Eileen frequently speaks on a wide range of topics including privatization, capital financing, strategic uses of university-related foundations, leadership and disaster recovery for a variety of organizations including the National Association of College and University Business Officers, the Association of University Research Parks, and the International Economic Development Council. She holds a Bachelor of Science degree in Finance and an MBA from UNO. Eileen is a graduate of CBMI and was awarded a Certificate for Site Planning Online from Massachusetts Institute of Technology edX.

After 30 years in higher ed, Eileen joined Brailsford & Dunlavey as Senior Consultant, focusing on public private partnership development and implementation. She has managed the full spectrum of university real estate development, from concept through operations. Previously Eileen held several roles on the University of New Orleans (UNO) campus, including President & CEO of UNO Research and Technology Foundation, VP & CFO of UNO Foundations, and AVC for Property & Facilities Development and AVC for Business Affairs at UNO. She holds a B.S. in Finance and MBA degree from UNO, and a Certificate for Site Planning Online from MIT edX.

Course Descriptions

Foundations: Fundamentals and Strategic Management

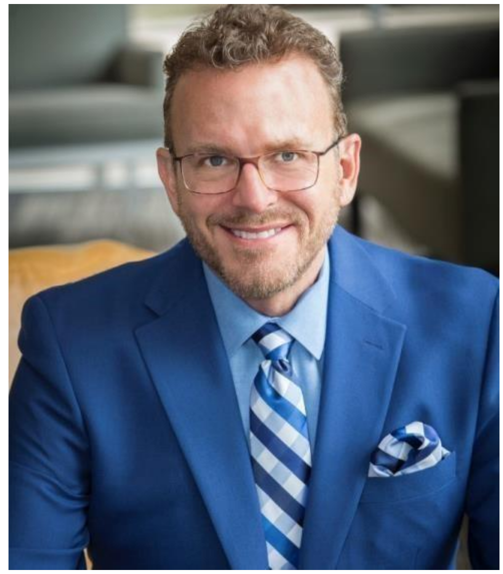
Foundations raise and manage billions of dollars on behalf of colleges and universities. Traditionally, foundations have primarily focused on fundraising and endowment management but have since evolved to also serve as vehicles for intricate financing transactions and economic development projects often involving complex private-public partnerships. This course will provide background on what foundations are, why they came into existence, their importance to the institutions they serve and how they operate. In addition to the commonplace uses, the course will provide insight into the creative and strategic roles foundations have played in the development of a wide variety of projects ranging from athletic stadium expansions and museums to research parks, lodging facilities, and even film studios. Leave with an improved understanding of university-foundation relationships, how to manage those relationships and learn how joint venture structures can advance your campus.

Introduction to Capital Finance (Treasury Track)

No experience in financing buildings, renovations, and other capital assets? Not really sure how to define just what a bond is? This course will provide the basics of capital financing, introducing you to the major players in the process and the language they speak. Explore the history of bond financing in higher education and leave with a basic understanding capital budgeting, the rationale for issuing debt and the sources of capital for colleges and universities.

Advanced Capital Financing (Treasury Track)

A well-balanced debt structure is essential to effective colleges and university business management. Issuance and effective management of debt require an intense commitment by the institution's administrative staff. This course will delve into many of the complex issues of capital financing including variable vs. fixed rate debt, credit enhancement, taxable vs. tax-exempt financing options, IRS arbitrage regulations and the effect of the subprime mortgage crisis on college and university debt. You will gain an understanding of bond covenants and their potential effect on your operating flexibility as you work through an analysis of risk vs. reward of the various types of bond issues, including off balance sheet transactions. Examples of actual transactions will be used in the course. You will leave with an enhanced knowledge of concepts necessary to successfully manage the issuance of debt for your institution.



Rob Clark, Jr.

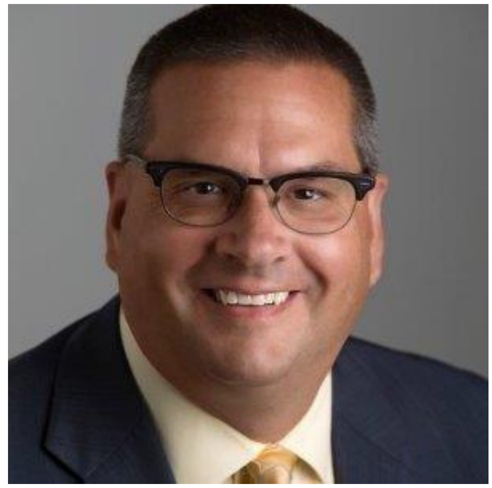
Biography
Rob Clark, Jr. is the Chief Compliance Officer at Howard University in Washington D.C. He is a professional speaker, humorous keynote speaker and member of the National Speakers Association. He has been active in leadership roles as President of the Association of College and University Auditors (ACUA); President of the Institute of Internal Auditors (IIA), Atlanta Chapter; member of the Security Task Force for EDUCAUSE and speaker at their annual and regional conferences; has been a speaker at NACUBO annual conference events and Chronicle Technology Forum for the Chronicle of Higher Education; and speaker for the National Science Foundation. He was the recipient of the first annual ACUA Member Excellence Award and the 2006 Professional Contributions Award "in recognition of his sustained outstanding contributions to the practice of internal auditing in higher education." Rob is a Certified Internal Auditor (CIA), Certified Compliance and Ethics Professional (CCEP), and Certified Business Manager (CBM) and received his BS degree in Business Administration from Gordon College in Wenham, MA. He has been recognized as an industry authority in auditing and compliance for over 3 decades serving as Chief Compliance Officer/Chief Audit Executive at Clark Atlanta University; Chief Auditor at Georgia Tech, Univ. of Nebraska, and Associate Audit Director at MIT. Rob has been an engaging presenter at CBMI since 1998, has conducted several Webinars, podcasts, and published numerous articles in professional journals. He also performs stand-up comedy having performed at The Punchline, Laughing Skull, and other comedy clubs. His interactive and humorous style make his classes fun and memorable. Making auditing FUN? You'll have to take his class to see for yourself!

Course Descriptions
Audits
This course will introduce participants to the modern university audit and compliance. Topics to be covered include: understanding the roles and responsibilities of auditors, what every administrator should know about audits and what auditors look for to facilitate an efficient review, effective practices for conducting self-evaluations to be prepared for an audit, current

best practices for managing risks over operational areas and information systems. This course will include interactive case studies and evaluations of current conditions on our campuses which present risks and recommendations for how to best mitigate those risks.

Contract Management

With more and more services being outsourced, how does a college or university manage these contracts? Certainly, it is a shared responsibility which may involve Purchasing and Legal Affairs handling the contract language; Accounting handling payments; but who is really monitoring to determine if the terms of the contract are being met, if deliverables are being satisfied, if costs are being controlled, if goods and services are being rendered appropriately, and if resources are being used effectively and efficiently. Participants will leave the session with tools, techniques and best practices for managing contracts.



Mark Coldren

Biography
Mark is currently the Associate Vice President and Chief Human Resources Officer at the University at Buffalo, The State University of New York with overall responsibilities for all HR functions including employee and labor relations, compensation, employee and organizational development, payroll, employee benefits, recruitment, work/life and wellness. Prior to coming to UB in July of 2015, Mark was CHRO of Ithaca College and previous to that a member of the senior leader HR team at Syracuse University and an adjunct faculty member in the Whitman School of Business. Before working in higher education, Mark worked in organizations specializing in manufacturing, sales and distribution, and software development. Previous organizations Mark worked with include UTC Carrier Corporation, Goulds Pumps, Inc., and Automatic Data Processing. Mark started as a history teacher in the public school system. He is a past chair of the College & University Professional Association for Human Resources (CUPAHR) National Board of Directors. Mark has a MS from Syracuse University and a BA from Cortland State University and is a certified Senior Professional in Human Resources (SPHR), 2006-09. https://www.linkedin.com/in/markcoldren/

Course Descriptions
Human Resources
This course will provide an overview of the human resource management function at institutions of higher education. Participants will obtain a foundation of information related to processes and techniques for effectively recruiting, interviewing, developing, and retaining qualified staff in the higher education setting. This session reviews basic elements of the human resource process including job analysis, recruitment, selection, orientation and development, performance management, compensation, and benefits. Techniques to be applied in each of the elements and interdependencies will be discussed.

Contemporary Human Resources Practices
This will be an interactive session designed to provide an overview of contemporary issues in human resources across institutions of higher education. Participants will review trends and

challenges in developing proactive human resource practices. Successful efforts will be reviewed in areas of policies, practices and techniques. Special attention will be given to the areas of HR information systems, retention strategies, change management, leadership development, and integrated health care management. Participants will review a systematic process for identifying human priorities at their respective institutions. Resources for action planning will be provided.

Anne Davenport

Biography
Anne Davenport is the retired Tax Director of Wake Forest University. She is considered by her peers to be an expert in Higher Education, Not-For-Profit Tax, and NRA information reporting. Anne started her career in Tax at KPMG in 1984 and specialized in uncommon tax returns, especially exempt organizations. Before joining Wake Forest University, Anne previously worked in tax administration at the University of North Carolina Charlotte and Miami University. Anne is a Certified Public Accountant in Ohio, California, and North Carolina.

Course Description
Tax Issues in Higher Education
Because colleges and universities are typically tax-exempt organizations, it can be difficult to convince people that there are, in fact, numerous tax issues to be faced. Over the past decade the IRS has conducted examinations at a number of institutions of higher education, and because of this increased level of scrutiny, colleges and universities must be ever mindful of the tax implications of almost everything they do. Failure to do so could result in significant tax liability, penalties, and interest, not the best use of scarce institutional resources. The goal of this course is to provide the participants with an overview of the tax issues in higher education, including, but not limited to: unrelated business income tax, employees vs. independent contractors, payments to nonresident aliens, tax-exempt bonds, fringe benefits, scholarships, fellowships and grants, student FICA, and charitable contributions.

Bob Dixon

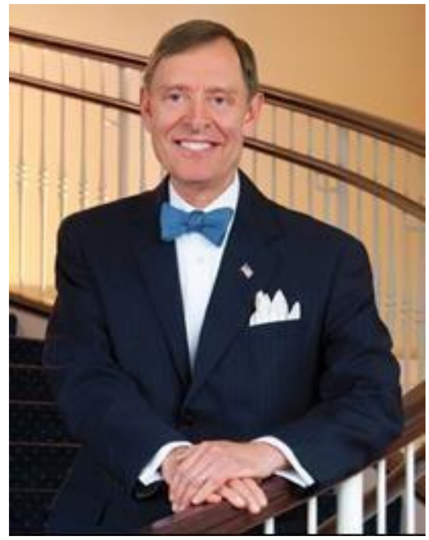
Biography

Robert Dixon currently serves as the Director of Grants and Contracts Financial Administration at Oklahoma State University. A member of the University of Kentucky's CMBI faculty, Bob has also presented various topics at state, regional, and national workshops and conferences for several organizations as well as served in various positions with regional and national organizations. Bob has degrees from Oklahoma State University, Mercer University, Georgia College, and Andrew College. He received National Association of College and University Business Officer's 2007 "Professional Development Award."

Course Description

Fraud/Ethics

The fraud section is designed to discuss fraud issues in higher education. Participants will be presented with and will discuss relevant real-life situations and decisions from a fraud perspective. The session will discuss findings from the Association of Certified Fraud Examiners' Report to the Nation on Occupational Fraud and Abuse. Topics will focus on how to detect fraud in an institutional environment, the cost of fraud, evaluation of fraud "hot spots", pro-action and reaction to fraud dilemmas. Participants will leave the course with awareness of the seriousness of fraud in higher education and various means by which perpetrators commit fraud in an institutional environment. The ethics section is designed to discuss ethical issues in the accounting profession and financial administration within higher education. Participants will be asked to read and discuss relevant real-life situations and decisions from an ethics perspective. Topics will focus on independence, evaluation, pro-action, and reaction to ethical dilemmas. Participants will leave the course with awareness of ethical behavior that can be nurtured and expanded into real life.



Jerry Farley

Biography
Jerry Farley has served as President of Washburn University since 1997. Prior to joining Washburn, Dr. Farley served as Vice President and CFO for the University of Oklahoma Norman and Health Sciences campuses and at Oklahoma State University. Jerry holds a B.B.A., M.B.A. and Ph.D. all from the University of Oklahoma. He is a C.P.A. and has been president and chair of the board of several state and national professional organizations. He has authored or co-authored numerous articles and books in his field - not for profit finance and accounting. He is a frequently requested speaker/educator. He has taught accounting for NACUBO, The University of Kentucky CBMI and The University of California Santa Barbara, for the past thirty- five years. He teaches and speaks about subjects ranging from accounting standards to ethics, leadership, and humor in the presidency. He served as Chair of the Board of NACUBO and SACUBO and as chair of the NACUBO Accounting Principles Council.

Jerry has served on local and state boards for United Way, American Red Cross, American Cancer Society, Boy Scouts, Kansas and Oklahoma Society of CPA's, state and local Chambers of Commerce and economic development corporations. He is past Chair of the Topeka Chamber of Commerce.

He was inducted into the Topeka Business and Oklahoma Higher Education Halls of Fame and is a Rotary Paul Harris Fellow. He received the CASE award for achievement in fund raising and the NASPA Presidential Excellence award. Jerry received the NACUBO Professional Development and Daniel Robinson Accounting awards. He was named the 2016 Kansan of the Year.

Course Descriptions
Problems in Accounting
The basic concepts of college and university accounting will be reviewed. Emphasis will be placed on

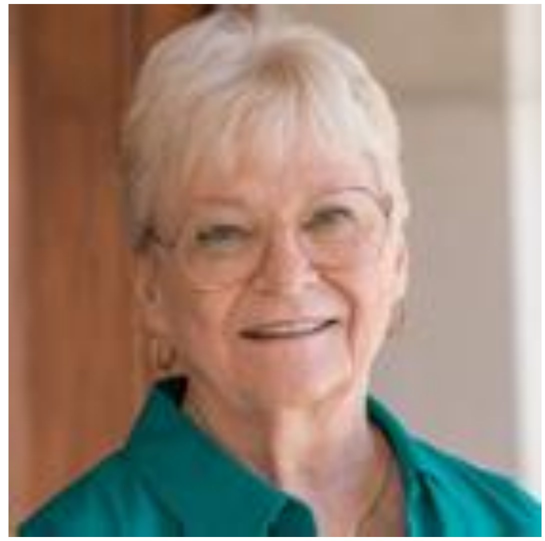
FASB and GASB standards. Issues and problems which commonly confront a college and university accounting office will be addressed, as will acceptable accounting practices and standards in reporting and how to treat special problems and concerns encountered. Recommended for those with some experience in college accounting.

Equipment Inventory

This course will present an overview of equipment management and planning. Discussion will include capitalization policies, computer-based property control systems, federal requirements regarding property management, and theft reduction programs. The session should be of interest to individuals who have direct accountability for equipment management as well as those who exercise more general responsibility.

Budgeting: Large Schools

This course provides a general overview of different budgeting techniques and concepts with an emphasis on budgeting terminology that will help the participant to make relevant enhancements and recommendations to their own college budgetary process and implementation. The broad concepts included in the discussion will touch on the following: principles of operating and capital budgets, allocation decisions, and budget cycles. Various budgeting methodologies will also be covered -- incremental, formula driven, zero-based, responsibility based, and performance driven. There will also be a discussion on the linkage of strategic planning and the impact of financial ratio analysis with the budget development process.



Mary Fischer

Biography
Dr. Fischer began her professional career as a financial administrator at The University of Connecticut. After serving as Controller at Columbia University in New York, she moved into the higher education academic world. She currently serves as a full professor of Accounting in the Soules College of Business at the University of Texas at Tyler. Dr. Fischer has published over ninety-five research papers regarding accounting recognition, financial accounting, internal auditing, and accounting curriculum as well as not-for-profit organization issues. She has authored five administrative and academic textbooks including Advanced Accounting published by Wiley & Sons and College and University Business Administration published by NACUBO. Her research has appeared in multiple academic and professional journals.

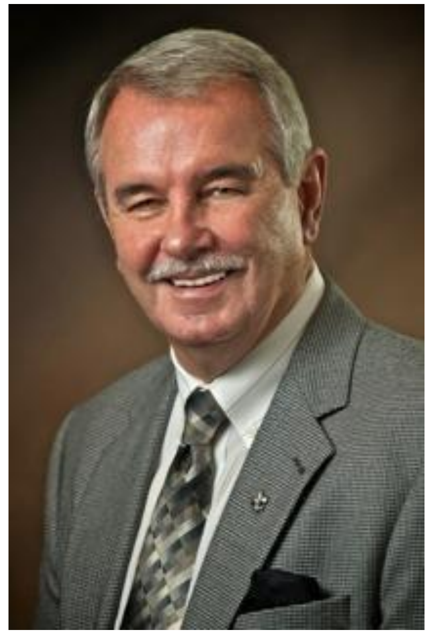
Dr. Fischer serves as the editor of the Federation of Business Disciplines Journal and is a member of six other academic journal editorial boards as well as a member of the American Accounting Association. She is a member of the NACUBO Accounting Principles Council and serves as an advisor to an array of not-for-profit organizations nationwide.

Dr. Fischer recently received the American Accounting Association Government and Nonprofit Lifetime Achievement Award for her government and nonprofit contributions and scholarship. She was awarded the outstanding academic researcher by the University of Texas at Tyler, outstanding researcher by the College, and the outstanding accounting educator by the Texas Society of Certified Public Accountants. She was awarded the Daniel D. Robinson and Professional Development and Scholarship awards by NACUBO for her outstanding contributions to the college and university national sector. She is a Certified Government Financial Manager and member of the East Texas Society of Certified Public Accountants.

Course Description

Fundamentals in Accounting

This course discusses the relationship of accounting to all other elements of management information and to functions of management. The course covers principles of fund accounting, accounting details and reporting standards for various funds based on Financial Accounting Standards Board (FASB 117), Governmental Accounting Standards Board (GASB 35), NACUBO's Financial Accounting and Reporting Manual for Higher Education, and other pronouncements of FASB and GASB. Selected financial ratios and indicators of financial statements will be discussed.



Pat Gibbs

Biography
Patrick Gibbs retired after forty years as a senior executive at the University of New Orleans, the LSU System, and the University of New Orleans Foundations. He holds the titles of President Emeritus of the University of New Orleans Research and Technology Foundation, Inc., and LSU System Vice President Emeritus for Property, Facilities and Administration. His responsibilities have included all university business and property functions, financing, planning, and construction for the nine-campus LSU System and eight public hospitals, fund raising and endowment management, development and management of a research and technology park, and numerous energy generation, housing and public-private economic development projects with the film industry, shipbuilding industry, and the National Aeronautics and Space Administration.

Pat is a former President of the Southern Association of College and University Business Officers, a former member of the Board of Directors of the National Association of College and University Business Officers, and currently serves on the boards of a savings and loan association and a large non-profit community health foundation. He is a principal in the consulting firm of GKB Consulting. LLC., and has been an instructor and speaker for NACUBO, SACUBO, WACUBO, AAURP and APPA, and has conducted workshops on capital financing, university-related foundations, disaster management, and privatized housing. He is a United States Air Force veteran and holds a B.S in Economics from the University of New Orleans, an MBA from the University of Guam, and is a CPA.

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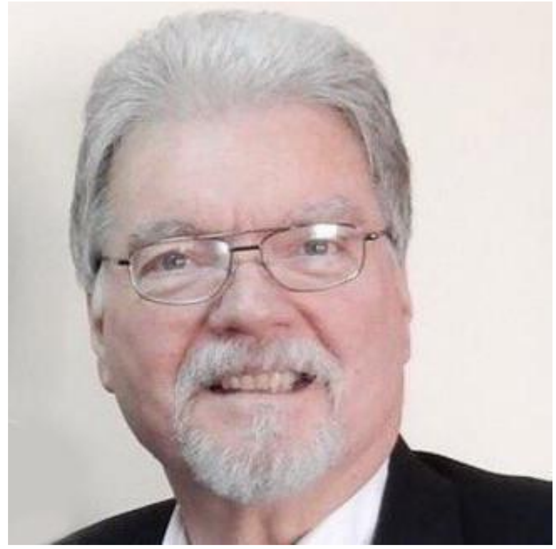


David Gleason

Biography
David Gleason has 20+ years of experience in human services working in the public and private sector, forprofit, not-for-profit, business, government, and academia. Work experience includes: training, teaching, community education, program management, supervision, counseling, social service planning and research, quality control and consulting.
He is a Member of the Association for Talent Development and holds multiple certifications including: Certified trainer for Character International Inc.; Certified Achieve Global Trainer; Certified trainer for EEO Compliance Training as required by the Texas Commission on Human Rights; Completed the 40 hour Basic Mediation course offered by the University Of Texas School Of Law, Center for Public Policy Dispute Resolution; Certified Trainer/Mediator for managing workplace conflict. He holds a Bachelor's degree in psychology from the University of Central Oklahoma (Edmond, OK) and a Master's in psychology from Wichita State University (Wichita, KS).

Course Descriptions
Learning to Think With More Than One Hat
The kind of thinking that goes on in most organizations today is based on a model that is often filled with confusion and sometimes influenced by factors other than reason and logic. It could be argued that the way most of us have learned to think is outdated and that we need a different approach to thinking. In this session we will talk about becoming "parallel thinkers." What's a parallel thinker, you ask? Come to the session and learn a different approach to thinking, decision making, and problem solving. You will be challenged to put on not just one thinking hat but six. You say, "I don't have six thinking hats." You will when you leave the session.

In this session participants will:

- Learn a different approach to thinking known as "The Six Thinking Hats."
- Review the primary influences that have shaped western thinking and understand how this has influenced the way in which we have learned to think.
- Be able to identify each of the six thinking hats and how they correspond to a particular style or approach to thinking.
- Join in a simulation exercise, where they will get to "try on" the hats and share their reactions about the experience.

- Understand the advantages of the six thinking hats model and review how it might be employed in their own work environments.

Teams That Cook Know How to Manage the Heat

As baseball great Casey Stengel said, “Getting good players is easy. Getting ‘em to play together is the hard part.” Casey understood what every workplace manager and employee needs to understand— teamwork is hard work. One of the greatest threats to any team is unrecognized, unaddressed, and unresolved conflict. In this session, we will define and discuss the nature of workplace conflict, examine five common approaches for responding to conflict, identify personal tendencies we may have when responding to conflict. Additionally, we will review action steps to take when we detect conflict that threatens the integrity and effectiveness of a team. Participants will learn that even the best teams are not conflict free—they just know how to handle the heat.

In this session participants will:

- Define and discuss the nature of workplace conflict.
- Examine five common approaches for responding to conflict.
- Identify personal tendencies they may have when responding to conflict.
- Review action steps to take when they detect conflict that threatens the integrity and effectiveness of a team.
- Understand even the best teams will experience conflict, but they just know how to handle the heat.

Larry Goldstein

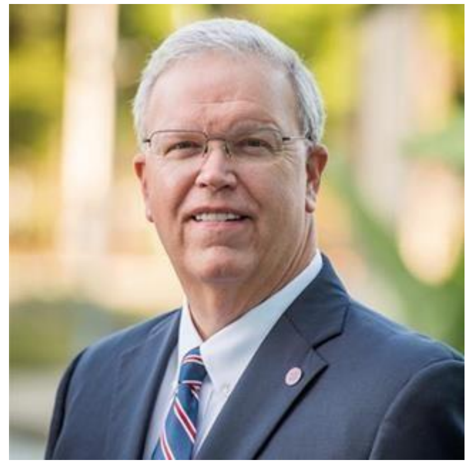
Biography
Larry Goldstein is the semi-retired president of Campus Strategies, LLC- a management consulting firm providing services to colleges and universities as well as organizations serving higher education. He has consulted to hundreds of colleges and universities, higher education systems, and various commercial entities providing services to colleges and universities. He also was involved in various professional activities including past service on GASB's Governmental Accounting Standards Advisory Council and the AICPA's Expert Panel on Not-for-Profit Organizations. Larry continues to write and speaks frequently on various subjects related to higher education finance and management. He presents and/or provides training for various higher education associations and individual colleges and universities. He is the author of College and University Budgeting: A Guide for Academics and Other Stakeholders, fifth edition, and has co-authored several other publications including Presidential Transitions. Prior to establishing Campus Strategies, Larry served as the senior vice president and treasurer of the National Association of College and University Business Officers (NACUBO). Before joining NACUBO, he spent 20 years in financial administration at four higher education institutions. In his last campus position, he was the University of Louisville's chief financial officer. He is a certified public accountant and earned a Bachelor of Accountancy degree from Walsh College (Michigan) and a Master of Science degree from the University of Virginia. He is a recipient of NACUBO's Daniel D. Robinson Award in recognition of his contributions to higher education accounting and financial reporting.

Course Descriptions
Alignment of Planning with Resource Allocation
Alignment of Planning, Resource Allocation, and Assessment Institutions can achieve improved effectiveness by integrating strategic, infrastructural, and operational planning and aligning them with resource allocation and assessment. Participants will learn about a comprehensive model built on collaboration. Institutions failing to plan in an integrated manner may succeed, but not over the long haul. Aligning the critical processes of planning, resource allocation, and assessment creates the greatest likelihood of success. Attendees will discover key aspects of

collaboration, integration, and alignment focused on achieving institutional success. A planning activity which engages attendees will be conducted during the session. Specific models will be described, and successful institutional examples will be provided. Using Financial Ratios to Assess Institutional Financial Health This session combines lecture with hands-on experience focused on financial ratio assessment for colleges and universities. Following a presentation on the critical elements of higher education financial ratio analysis, with particular attention to the Composite Financial Index (CFI), participants will measure their institution's financial health utilizing the financial statements they will bring with them to the program. Using templates provided during the session, and guided by the presenter/facilitator, they will examine the financial statements to find key financial elements necessary for calculating the four key ratios that comprise the CFI. After participants have calculated one year's CFI, the results will be discussed and diagnosed. Time permitting, participants will calculate an additional year's CFI and emerging trends will be examined. Accounting expertise/experience is not required for this session; however, participants MUST BRING A PHONE OR CALCULATOR AND TWO YEARS OF AUDITED FINANCIAL STATEMENTS. THOSE FROM PUBLIC INSTITUTIONS SHOULD BRING THE FINANCIAL STATEMENTS FOR THEIR COMPONENT UNIT FOUNDATION(S) FOR THE SAME YEARS.

Course objectives:
Alignment of Planning, Resource Allocation, and Assessment Participants will be able to participate in planning teams at their campus. Participants will be able to engage in planning activities at their campus. Participants will be able to demonstrate that plans align with resource allocation and assessment. Using Financial Ratios to Assess Institutional Financial Health Participants will be able to calculate the Composite Financial Index for their institution. Participants will be able to calculate the Composite Financial Index for their institution. Participants will be able to diagnose their financial ratios and will know what steps to take to improve the ratios.

Using Financial Ratios to Assess Institutional Financial Health
This session combines lecture with hands-on experience focused on financial ratio assessment for colleges and universities. Following a presentation on the critical elements of higher education financial ratio analysis, with particular attention to the Composite Financial Index (CFI), participants will measure their institution's financial health utilizing the audited financial statements they will bring with them to the program. Using templates provided during the session, and guided by the presenter/facilitator, they will examine the financial statements to find key financial elements necessary for calculating the four key ratios that comprise the CFI. After participants have calculated one year's CFI, the results will be discussed and diagnosed. Time permitting, participants will calculate additional years' ratios and emerging trends will be examined. Accounting expertise/experience is not required for this session; however, participants must bring a phone or calculator and two years of audited financial statements. Those from public institutions should bring the corresponding audited financial statements for their foundation(s).



Russ Hannah

Biography
Russ Hannah is the Senior Associate Vice Chancellor for Finance and Associate Chief Financial Officer at Arkansas State University. He's worked at A-State for 29 years in various financial roles including treasurer, controller, assistant vice chancellor for finance, and associate vice chancellor for business and finance before assuming his current position in 2017. Prior to coming to A-State, he worked for Arkansas Legislative Audit for 8 years.

Russ holds undergraduate degrees in management and accounting, an MBA, a specialist in community college administration, and a doctorate in educational leadership, all from Arkansas State. He is a certified public accountant, a charted global management accountant, and a certified government financial manager and is a graduate of Harvard University's Institute for Educational Management and the Institute for Higher Education Management at Vanderbilt University. He is a member of the board of directors of NACUBO, the immediate past president of SACUBO, and a former chair of the NACUBO Accounting Principles Council.

Course Description
Higher Education Analytics
Technology is advancing at a rapid rate. Massive amounts of data are being generated, stored, used, and analyzed. Business Officers are no longer charged with routine tasks and processes but expected to understand data—how it is created, collected, stored, accessed, and used. Business Officers and other higher education professionals must be able to adequately safeguard this data as well as work with it, think critically about the story it is telling, and use it to make better decisions. Thus, it is critical that all individuals in higher education become comfortable with large data sets and various technologies.

Course objectives:

- Introduce participants to the different technologies that are being used to capture data, evaluate data, make decisions, and report on the information.
- Explore the different ways higher education departments are currently evaluating data.
- Challenge participants to think about other opportunities to utilize data for decision making.

Steve Hoffman

Biography
Steve is a tax professional with many years of experience and education and is dedicated to providing education and consulting on taxes to colleges and universities and nonprofit organizations. He has served as Tax Manager of George Washington University, the largest nonprofit educational organization in Washington, DC. He is the former Director of Tax Services, and Payroll in the Business and Finance Division at the flagship West Virginia University. He also served for six years as the first ever Director of Taxation at The Ohio State University, the largest land grant university in the US. He is editor and publisher of the Tax Update Newsletter for Higher Education that is distributed to colleges and universities around the United States and publishes a Blog on taxes in Higher Education that is widely read. His background includes 15 years with the IRS and he is an Enrolled Agent Before the IRS. He has been employed in multiple areas of taxation such as local government, federal government, nonprofit organizations, and corporate taxation.

He was appointed by the Secretary of the Treasury to serve on the Advisory Committee for Taxation for the Tax Exempt/Governmental Entities Division of the IRS where he received the Commissioners Award and also on the Taxpayer Advocacy Panel of the IRS. Steve is also a Certified Financial Planner and graduated with a Master of Science in Taxation Degree from Capital University in Columbus, Ohio. He has been a member of the Southern Association of College and University Business Officers and served on the Doctoral and Research Institutions committee. He has presented at the SACUBO, CACUBO and EACUBO Annual Meetings, SACUBO Drive In Workshops, ACUA, and participated in NACUBO presentations. In addition, he has provided seminars and workshops for various other organizations. With his extensive experience with the IRS and as Tax Manager for 3 universities, Steve is well versed in tax controversy meaning that he successfully represents colleges and universities before the IRS in audit situations. Steve is an accomplished speaker who has earned his membership in the National Speakers Association and whose focus is on the audience learning. Known as the The Tax Translator, he makes tax law easily understood and has been called Tax with Personality. He has been quoted in the USATODAY, and The Christian Science Monitor, Baltimore Sun and the

Dominion Post newspapers. He has also appeared on WBOY- TV for a series of tax tips. His book, Taxation for Universities and Colleges: Six Steps to a Successful Tax Compliance Program was recently published by Wiley Publishing. His second book, Resources from The Tax Translator is over 400 pages of samples of policies related to tax, questionnaires, flowcharts, decision trees and other helpful articles to implement the six steps of a successful tax compliance program at your school.

Course Description

Six Steps to Successful Tax Compliance Program

Is responsibility for tax filings, depositing and reporting disbursed throughout your university? Do people only have tax responsibilities as a small part of their position? This decentralized method of attempting to be compliant with tax law allows for error resulting in costly penalties from the IRS and state and local taxing authorities. Learn how to build a tax compliance program through these seven steps you can start tomorrow, so you can sleep at night. Steve Hoffman, The Tax Translator, has developed and implemented Seven Steps to a strategic Tax Compliance Program for colleges and universities. This program will show you six steps to take to build one at your school. Let Steve Hoffman take you through the steps of: Awareness of Tax Liabilities, Identification, Compliance (Policies and Procedures, Internal Controls) Monitoring, Reporting and building an audit defense BEFORE the audit. He brings a wealth of experience with best practices built on practical and useful tips and techniques to take you to the top of the Tax Compliance Pyramid.

Jairy Hunter Jr.

Biography

Dr. Jairy C. Hunter, Jr. is President Emeritus and Professor of Management at Charleston Southern University. Charleston Southern University is one of the largest private, accredited universities in South Carolina. Dr. Hunter teaches graduate courses in the College of Business. Previously, Dr. Hunter has served as Vice Chancellor for Business Affairs, Chancellor for Development, and Associate Professor of Accounting at the University of North Carolina at Wilmington, Vice President for Administration at Broward Community College, and Vice-President for Business at Blue Ridge Technical College. He also served as Dean of Students and Professor of Higher Education and Management at Appalachian State University. Dr. Hunter earned an Associate Degree in Business from Wingate University, B.S. in Business and an M.B.A. and M.A. in Student Personnel Services from Appalachian State University. He received a Ph.D. in Educational Administration and Management from Duke University. He is a member of the faculty of the College Business Management Institute at the University of Kentucky. He also serves as a member of the WACUBO Business Management Institute faculty at the University of California, Santa Barbara. The National Association of College and University Business Officers (NACUBO) recently presented Dr. Hunter the Distinguished Business Officer award at the annual meeting. The Governor of South Carolina recently bestowed the Order of the Palmetto to Dr. Hunter, the highest civilian honor. Dr. Hunter was also awarded the Order of the Silver Crescent, which is South Carolina's highest civilian award for significant contributions and lifelong influence. Dr. Hunter is an effective leader and keynote speaker in higher education. He is married to Carolyn (Sissy) Hunter. The Hunters have two grown children in the medical profession and four grandchildren.

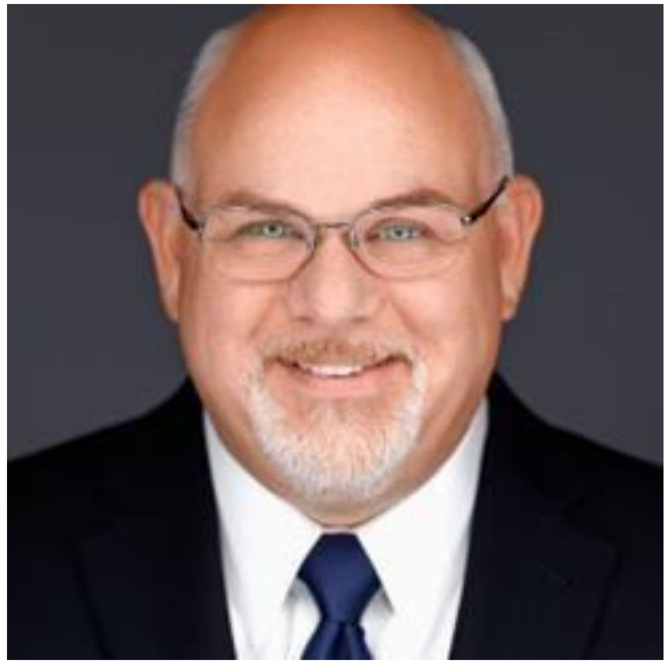
Course Descriptions

Management Problem Solving

Management Problem Solving: Every organization experiences two basic types of problems: people problems and institutional problems. Administrators and supervisors are faced with an ever-increasing abundance of adversity, miscommunication, change, low morale and diminishing resources. Professionals must be good problem solvers. Albert Einstein said, “You can never solve a problem on the level on which it was created." The best problem solvers have patience, step back to see the big picture, and consider everyone's opinion before determining the best strategy to implement. Problems and conflicts must be dealt with in a timely manner to prevent problems from escalating throughout the organization. This course will equip higher education professionals with the skills to identify, analyze and develop strategies for implementation to resolve problems and conflicts.

The Business of Higher Education
This course presents an overview of the organization, administration, and critical role of college and university business officers in the educational process. Lectures and discussions will focus on effective leadership practices, business affairs issues, and challenges facing college business professionals.

Strategic Planning for Universities
The strategic planning process in higher education institutions, shortcomings of old approaches, new approaches to planning, and the organizational conditions required for strategic planning will be covered in this course. This session also focuses on the relationship strategic planning has on institutional effectiveness and the significant role of the business officer in this process.



Phil Hurd

Biography
Phillip is currently the Chief Audit and Compliance Executive at the University of Houston System. For over twenty-one years Phil has delivered vital Ethics, Enterprise Risk Management, Compliance and Internal Audit leadership to organizations with multi-billion-dollar operations. Phil has recruited, trained and lead staffs of audit and investigative professionals that have changed the way business was conducted at the organization and system level. Phil's responsibilities have included the development and implementation of policies, processes, standards and analytic work tools to increase efficiency, effectiveness, and operational savvy.

Phil and his teams have uncovered millions in fraud, malfeasance, theft and misdirection. Hundreds of fraud and investigative interviews, participation in numerous prosecutions of fraud, and thousands of hotline cases have tempered his investigative skills and given him enhanced insight into ethics and the lack thereof.

Before entering the world of higher education, he spent a decade in the United States Army. Through that experience as an electronic warfare and intelligence professional he learned the real-world critical need of integrity, confidentiality and availability of information assets. His diverse portfolio of skills and experience has given him the ability to speak authoritatively on ethics, fraud, data analytics, leadership, internal control structures, compliance and motivation. Phil is a frequent presenter at professional conferences and teaches purchasing card and data analytics classes at the College Business Management Institute (CBMI)

Phil is a certified Compliance and Ethics Professional (CCEP), a Certified Information Systems Security Professional (CISSP) and holds a Master's Degree in Information Systems (MSIS).

Course Descriptions

Using Business Intelligence Systems to Gain Insight into Processes and Finances

This is a data-analytics starter class that will introduce the participant to large scale business intelligence systems and how to create visualization to gain insight into any process that is data driven. Example of data driven systems include budgets, parking systems, investigations, compliance, and federal cost analysis. Anything that you can collect data on can be analyzed using this course. For those taking the "Travel and Procurement Card Management" class the data discussed in that class will be used in this class. A walkthrough using an extracted data sample example using Microsoft platforms will be given.

Modern Payment Systems: Evaluation, Control and Management

This course is an introduction and overview of modern payment systems that are used in Institutions of Higher Education (IHE.) The course will introduce the learner to control systems that should be in place. The course will discuss and review credit card (procurement card systems), crypto currencies and monetary substitutes (block-chain) as well as electronic catalog payments. Fraud schemes in each of these systems will be discussed. The learner will leave being able to do the following:

Course objectives:

- Develop and evaluate risk assessments for payment systems.
- Identify current fraud schemes and the control structure to prevent them.
- Engauge compensating controls for protection in credit card payments.

Susan I. Krauss

Biography
Susan currently serves as Associate Director for the Treasury Institute for Higher Education, an independent not for profit organization that promotes excellence in higher education treasury and financial management through development of educational programs and sharing of best practices. Susan was active with the Institute for several years as a practitioner and formerly served as a Board member. Susan is also serving as Senior Fellow for the Kentucky Council on Postsecondary Education (CPE) to assist with CPE's oversight of Kentucky State University and other projects as needed.

Prior to her retirement in April 2020, Susan served as Treasurer for the University of Kentucky (UK) and was responsible for overseeing various financial and treasury functions including investments, endowments, debt, banking, payroll, accounts payable, travel management, student billing and collections, research accounting, cost accounting, property records, and accounting and preparation of internal and external financial reports. Susan joined UK in 1999 as the Manager of Treasury & Endowment Services and served in various positions prior to her appointment as Treasurer in 2014.

Prior to joining the University of Kentucky, Susan served as a financial analyst for Lexmark International, Inc., an audit manager for Coopers & Lybrand (now PwC), and an internal auditor for Kentucky Utilities, Inc. During her tenure at Coopers & Lybrand, Susan performed financial statement audits for clients in the higher education, banking, and manufacturing industries.

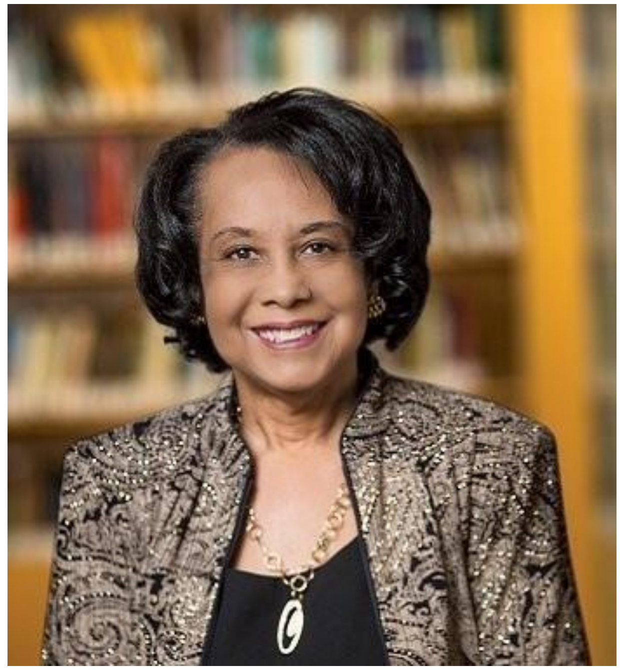
Susan remains engaged in the higher education industry through her work with the Treasury Institute and CPE, and by serving as a faculty member for the College Business Management Institute and a mentor for the UK Gatton College of Business & Economics Women Business Leaders program. Susan is also active in her community, serving on the UK Sanders-Brown Center on Aging Philanthropy Council, Bank of the Bluegrass Advisory Board and the Bluegrass Community Foundation Board and Investment Committee.

Susan holds Bachelor of Science degrees in Accounting and Business Administration and is licensed as a certified public accountant in Kentucky.

Course Description

Fundamentals of Higher Education Investments (Treasury Track)

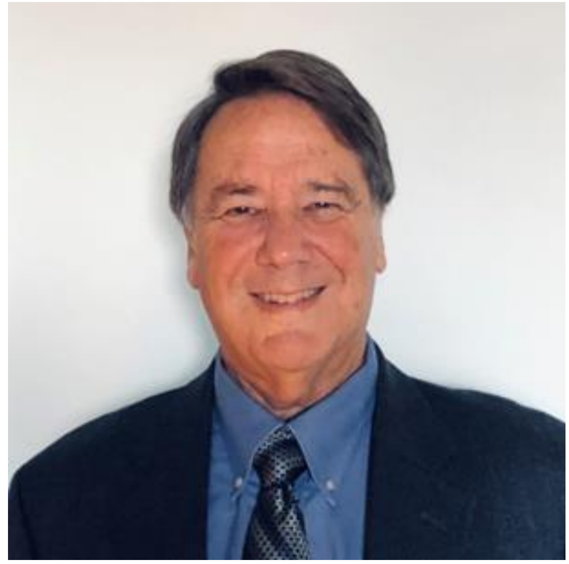
This session will provide an overview of how higher education entities invest and develop investment policies to achieve the goals of short-term, operating reserve and endowment portfolios. The discussion will focus on the purpose, policies and execution of each area of investment. From this session, participants should gain an understanding of the risk management of investment portfolios and the role treasury managers play in the oversight.



Beverly Ledbetter

Biography
Beverly Ledbetter recently retired from her position as the Vice President and General Counsel at Brown University (Providence, Rhode Island). She serves on the Bryant University Board of Trustees and is also Expert Consultant, Higher Education Center, International Advisory Board, Center for Excellence in Higher Education Law and Policy, General Counsel Advisory Board, National Association of Independent Colleges and Universities , Co-Chair, University Symposia Committee, Federal Court Bench/Bar Committee, RI Bar Association, Faculty Member, Management Development Program, Harvard University, Faculty Member, College Business Management Institute, University of Kentucky. She is the recipient of 3 Honorary Doctorate Degrees: Brown University (2018), Bryant University (2018), and Roger Williams Law School (2005).

Course Description
Current Legal Issues in Higher Education
This course provides an overview of the law of higher education including a basic understanding of the internal and external legal environment. Participants will review distinctions between public and private institutions and learn how federal, state, and local laws apply. Basic concepts will be illustrated using questions for discussion based on current and emerging legal issues in areas such as academic freedom and free speech, student discipline, discrimination and harassment, privacy and electronic, fraud and other criminal acts.



Jeff Marsee

Biography
Jeff Marsee, Ph.D., is a higher-education consultant, presenter, retired college president, author, and former Fulbright Scholar to Russia. He earned Economics degrees from the University of Southern California (BA) and California State University at Long Beach (MA). His Ph.D. in Community College Leadership (Higher-Education Administration) was awarded by the University of Texas, at Austin. During Dr. Marsee's career, he worked in the non-profit and for-profit higher education sectors as an instructor, chief financial officer, provost, and president. He also spent nearly a decade as a higher-education consultant, working with college stakeholders to improve processes that impacted on-time graduation rates. The culmination of his experiences and research has resulted in the writing of Finish in Four: Challenging College Norms to Improve Graduation Rates, Austin Macauley Publishers, New York (2020).

Dr. Marsee has presented at CBMI for more than thirty-five years, sharing his experiences as a career "change agent" while working and consulting in change resistant environments. Jeff will be presenting the following topics at the 2020 CBMI conference: Managing Teams in a Changing Environment (HED 2224); Finish in Four: Strategies for Improving On-time Graduation Rates (HED 2289); Strategic Budgeting: Instruction-First Budgeting (BUD 2246); and Why I Like You, Why I Don't (PER 2259).

Course Descriptions
Finish-in-Four: Strategies for Improving On-Time Graduation Rates
Higher education is in a state of crisis!

College budgets are becoming a challenge to balance. Expenses are continually increasing in an environment of declining enrollments, endowments, and government support. The Stop-gap solution for decades was to increase tuition which is no longer viable.

Students, parents, donors, and government agencies are scrutinizing the cost and return on investment of a college education. Colleges are under pressure for their underperformance of only graduating 40% of full-time students on time while the national student debt, often caused by delayed graduation, is skyrocketing. Addressing the issue of approximately 2 million students annually dropping out of college provides an opportunity for colleges to turn the crisis around. Finish in Four introduces a data driven model and examples of best practices for developing strategic solutions in ten key areas to improve ontime graduation rates, reduce student debt, and improve fiscal stability for America's colleges. Class participants will learn about the leading concepts and strategies used to retain students and what the business officer can do to be an important participant in the assessment, development, and participation of enrollment strategies. Attendees will be provided a comprehensive check list and score sheet to assess their college's institutional effectiveness related to enrollment and retention practices.

Strategic Budgeting: Instruction-First Budgeting

During the post-COVID college era, understanding how to efficiently allocate actual instructional resources (approximately 50% of a college's budget) has become a critical skill for institutional survival. This presentation explains how to use data (faculty productivity, projected enrollments, ratio of full and part-time faculty, etc.) to build an instruction-first budget.

Participants will collaboratively calculate a hypothetical instruction-first budget given certain macro assumptions. The instructor will then guide the class through a case study to evaluate a university's actual resource allocation decisions following a significant (25%) decline in enrollment. Data will be used to compare faculty load/productivity information before and after enrollment declines occurred. Discussion about how well the case study university adjusted its instructional expenditures will be encouraged.

Participants will learn how to build a budget by first establishing instructional-related assumptions related to enrollment projections. This class will also provide examples of how to assess faculty productivity, necessary for avoiding politically motivated allocations and potential institutional fiscal instability. Previous experience in developing a college budget is not necessary.

Managing in a Changing Environment

The work environment is changing rapidly. Successful managers need to develop leadership skills that will effectively motivate and retain today's employees.

Participants will obtain insights to improve mentoring skills and employee motivational strategies. Concepts will be introduced that can be used to support employees that have different generational workplace preferences, unique needs related to communication and recognition, and differing career path expectations.

Following a brief overview covering the evolution of management theories, the participants will complete several self-assessment managerial behavior surveys including the popular "Big-5" personality appraisal. The self-assessment questionnaires will help participants understand how their preferred supervisory approach can best impact their work environment.

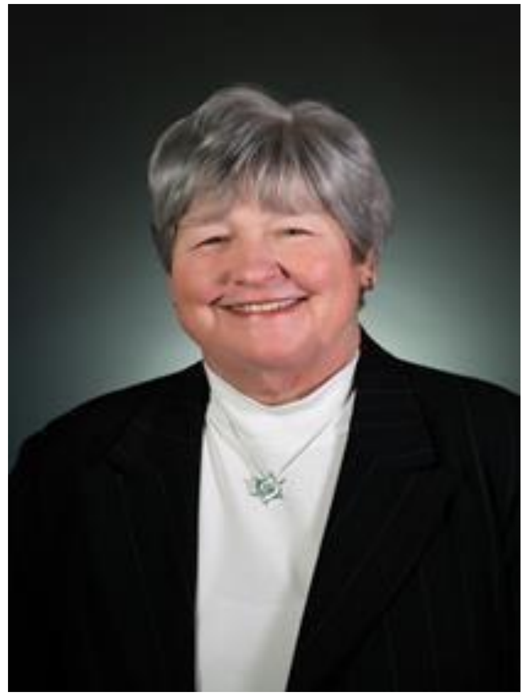
The presentation will culminate by explaining how understanding a college's culture is important when implementing organizational change initiatives. This section will complement the leadership behavior skills information presented in the "Why I Like You, Why I Don't" program.

The expected outcome from this class will help new and experienced managers better understand how to motivate and retain employees in a changing and diverse work environment.

Why I Like You, Why I Don't

We don't like to admit it but determining whether we like a new acquaintance occurs within the first half-second of contact. People react to others based on which of four behavior styles their new contact immolates. People with similar behavior styles tend to like each other. Opposites, not so much. These initial subconscious reactions to others impact personal and professional relationships. To be effective team builders, managers must be able to neutralize first impression reactions, especially when attempting to integrate staff that don't think and act alike. Why I Like You, Why I Don't, is a popular class that includes a self-administered behavior assessment questionnaire ("As I See Myself") that gives each participant the opportunity to understand their preferred way of doing things. The objective is not to change personal behaviors, but through a better understanding of others' style preferences, improve relationships that will result in stronger teams.

Lisa Marie McCauley



Biography
Dr. Lisa Marie McCauley, CPA, currently consults with schools and colleges in Finances and Accreditation areas. Previously, she has served as President of the Middle States Association of Colleges and Schools, CESS, Senior Vice President for Finance at the Commission on Higher Education and CFO of several colleges. Her Ed.D is in Higher Education Leadership from Widener University. She holds an MBA in Accounting and Finance from the University of Scranton, and a BS in Accounting and Theology from King's College. She has worked in the educational environment for over 25 years, coming from the corporate banking sector in Pennsylvania and New Jersey and Public Accounting / Consulting at Deloitte and Touché. Dr. McCauley has taught as an adjunct faculty member in lecture and online courses at the University of Maryland Global College, King's College, Northampton Community College, and Middlesex Community College. She has served on numerous educational committees, such as the Institutional Resources and Planning Committee (budget and strategic planning), facilities development, and finance and investment committee. She is a published author, a frequent speaker, and has significant experience in educational administration. Additionally, Dr. McCauley serves on various volunteer and service organizational boards and activities; she resides in Northampton PA.

Course Descriptions
Accreditation
Accreditation is a process used by colleges, universities, and other institutions of higher education to sustain and strengthen their quality. To earn and maintain accreditation, colleges

and universities must demonstrate to colleagues from peer institutions that they meet or exceed mutually agreed-upon standards. In the United States, accreditation is a significant way that colleges and universities can give the public confidence that they provide a quality education. Accreditation offers a number of specific benefits to students and their families as well as to the colleges and universities themselves. Updates on the Re-Accreditation Act of 2020 (effective 7/1/2020) will be highlighted.

Alternate Revenue Sources: Supporting a Positive Bottom Line

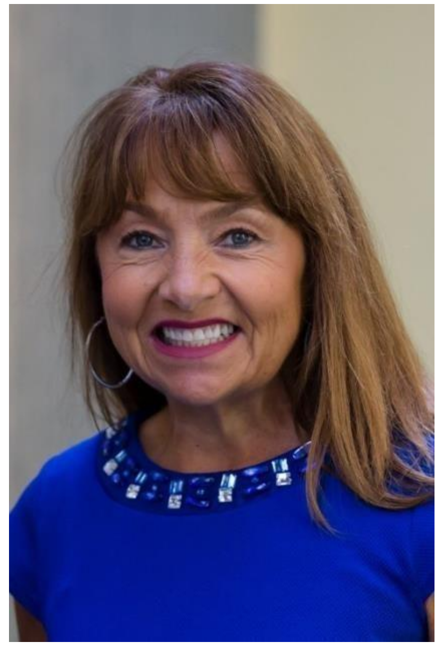
Declining enrollment and declining state and local funding, institutions must seek alternative ways to secure additional funding. What have institutions used to help the bottom line? What Works and What Doesn't? Bring your ideas to the discussion and let's think outside the box.

Budgeting: Small Schools

This course provides a general overview of different budgeting techniques and concepts with an emphasis on budgeting terminology that will help the participant to make relevant enhancements and recommendations to their own college budgetary process and implementation. The broad concepts included in the discussion will touch on the following: principles of operating and capital budgets, allocation decisions, and budget cycles. Various budgeting methodologies will also be covered -- incremental, formula driven, zero-based, responsibility based, and performance driven. There will also be a discussion on the linkage of strategic planning and the impact of financial ratio analysis with the budget development process.

Budget Process and the Business Officer

Budgets are a means of allocating resources to achieve the institution's strategic objectives while controlling expenditures within the institution's financial parameters. Discussion will involve the role of the business officer and the budget process in building institutional commitment, encouraging alternative scenarios for resource maximization, and reinforcing accountability. This course is intended for those involved with budgeting or planning and assumes a basic knowledge and understanding of budget systems and approaches. Prior participation in an institution's budget process at some level (central administration or departmental) will be helpful. Class discussion and participation will be encouraged.



Sarah Nikirk

Biography
Sarah Nikirk is the Executive Director of Auxiliary Services at the University of Kentucky. Sarah oversees several associate directors/managers and works with several business partners who respectively perform the "city of services" that enhance the college experience.

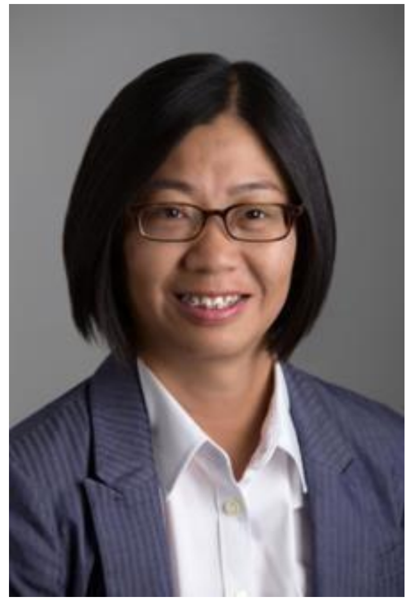
She is a member of several professional organizations such as NACAS, ACUHO-I, SEAHO and KAHO. Sarah's department oversees the College Business Management Institute (CBMI) and she has 20 + years of experience working with the staff and faculty that orchestrate the conference.

Sarah also chairs or resides as a representative on several Presidential appointed committees at the University of Kentucky. She is also a board of director for the Bluegrass Region of the American Red Cross.

While Sarah leads many managers at UK and has experience in Housing, Dining, Bookstore, Post Office, and Print and Design services, her real love is sharing with students the benefits of living on campus. "I love meeting new students and their families every year and tell them why I loved college and living on campus, and I can explain to them how they're going to learn so much about themselves by living with other people…real life experiences that make us rich outside of the classroom." Auxiliary Services departments across the country are enhancing the college experience by the services they offer.

A graduate of Western Kentucky University, Sarah holds a Bachelor of Arts degree in Public Relations and a minor in Human Services. Sarah also has 31 years of business and marketing experience in Auxiliary Services. Auxiliary Services departments across the country are enhancing the college experience by dedicating their hard work and services to students, faculty, and staff.

Course Description
Auxiliary Services
The type of services requested by students today differs from that of their predecessors. The need to change many of the traditional services offered by campus service organizations is significant. Freedom of choice, variety and flexibility are the challenges facing today's service providers. This session focuses on the basic services offered by colleges and universities and the changes that need to occur if customer satisfaction is to be sustained. The types of changes will be discussed including their financial benchmarks. Methods of cost analysis and their financial impact will be discussed. Representatives from three institutions (large, medium, small; public and private) will describe what services are provided by their unit and how auxiliary services supports the mission of their institution. The panelists will also share how auxiliary services has played a role in supporting their institution during COVID-19.



Tonga Pham

Biography
As the Associate Vice President for University Facilities, Tonga leads the charge to maintain a safe, healthy, and attractive campus environment at the largest public research university in the Northeast. She specifically oversees 11 million gross square feet across nearly 200 buildings on 1,200 acres of land at the University at Buffalo.

Tonga is an enthusiastic innovator and focuses on integrating the latest evidence-based customer service models, organizational change, construction processes, building maintenance and energy and sustainable design into her work to meet the complex needs of today's higher education environment. Prior to taking on her current role, Ms. Pham was the Director of Facilities at Ryerson University where she successfully oversaw the planning, operations, and maintenance of a 4 million gross square feet urban campus. She also has over 20 years of engineering experience combined with 15 years of progressively senior management roles across multiple sectors including manufacturing, pharmaceutical, and higher education.
Ms. Pham holds a Bachelors of Chemical Engineering from McMaster University and a Masters of Business Administration from Ryerson University. A lover of “all things outdoors,” Tonga enjoys camping, canoeing, and hiking with her husband, David, and their two dogs.

Course Description
A Foundation in Facilities
This course provides an overview of the management of facilities development, including the process of developing a long-range campus plan, design, construction, and financing of college and university facilities.

Lewis Prewitt

Biography
Lewis has more than 40 years of human resources and leadership experience in industry, government and higher education. He serves as the President of Prewitt Management Consultants, LLC, a consulting firm focused on human resources and leadership development. In the many key leadership positions held, he has developed and implemented numerous complex human resources initiatives in a wide variety of organizational cultures. Having served in interim senior leadership roles and consulting assignments he has worked with executive leadership and boards of directors during times of change and implementation of new initiatives. In addition, he has served as an adjunct faculty member with Bluegrass Community and Technical College and Midway University.
Lewis is a graduate of Transylvania University with a bachelor's degree in business administration and holds an MBA from the University of Kentucky. He is accredited as a SHRM-SCP; has a lifetime certification as a Senior Professional in Human Resources (SPHR).

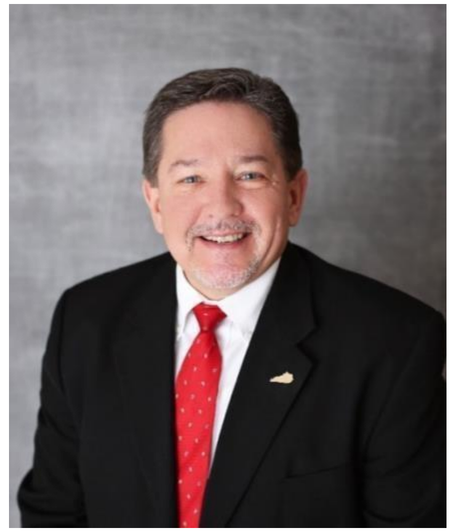
Course Descriptions
Leadership in a Virtual Environment
This session will explore how the pandemic impacted how leaders survived in 2020 and the implications for the future. Leaders must always be flexible and adapt to change, but this is more than could have ever been anticipated! Colleges and their leadership teams were challenged to make alternative arrangements for faculty, staff, and students on the fly while all of the rules kept changing. A review of leadership skills and how they were applied during the pandemic will be discussed, with participants sharing lessons learned, best practices and emerging trends from their colleges.

Upon completion of the course, you will learn about what leadership skills worked (and some that didn't!) in higher education and other industries. You will gain knowledge that can guide you in being the best leader you can be as the traditional class and office environment continues to evolve.

Talent Management Strategies in Challenging Times

The session will explore strategies for effective Human Resources planning and forecasting; recruitment; selection; and retention of quality employees. Investing the time in hiring and developing the best employees, benefits the faculty, staff, students, and the entire college community. During the session, participants can share experiences to help understand what works…and what doesn't throughout the employment cycle.

At the end of this course, you will understand the employment cycle and the need for REAL commitment to the selection process, and the consequences of not having a focus on talent management in the college.



Bill Redwine

Biography
An outspoken proponent of technology applications and their use in education, Bill Redwine served as Director of Auxiliary Services at Morehead State University from November 1998 until December 2006 when he was named Assistant Vice President for Auxiliary Services. Responsible for oversight and management of the University Bookstore, Food Service, Concessions & Vending, Laundry Service, Postal Service, EagleCard Office, Document Services, Environmental Health & Safety, Risk Management and Eagle Trace Golf Course, Bill has been heavily involved in the implementation of various technology applications on the campus until his retirement in 2019.

A native of Sandy Hook, KY, Bill assumed his role in Auxiliary Services following 15 years in the Office of Alumni Relations and Development at Morehead State where he held a variety of positions, the last one as Director of Alumni Relations and Development.
During his tenure with Alumni Relations and Development, he was instrumental in the development and implementation of a computerized database and tracking system for the alumni office. Under his guidance in 1998, the University surpassed $2 million in private gifts for the first time during a fiscal year.

Mr. Redwine holds a bachelor's degree in government and public affairs from Morehead State where he was a member of Sigma Nu Fraternity and active in the Student Government Association. His graduate studies include the areas of higher education, business, and sociology.
Bill's expertise in student auxiliary services was recognized by his election as the 2006 President of NACAS-South, the regional group representing fifteen states in the National Association of College Auxiliary Services followed by a term on the NACAS national board of directors representing the Southern Region. In 2015 he was elected Vice President of NACAS followed by President-elect and in 2017 assumed the Presidency of NACAS at the national level and currently serves on the NACAS Foundation Board of Directors. Mr. Redwine has written a

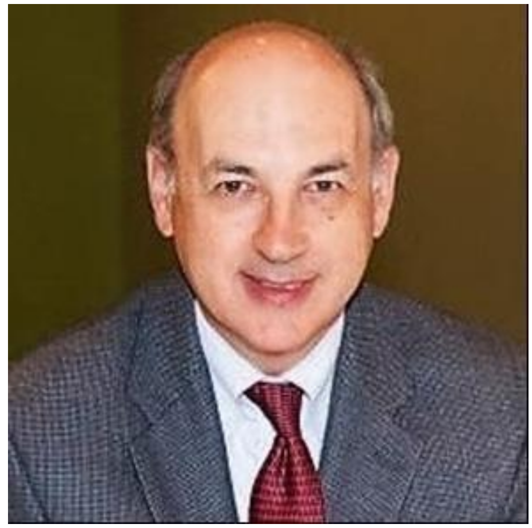
variety of articles for higher education publications and technology newsletters on such issues as fundraising in higher education and applications for smartcard technology.
Bill is active in the Morehead community where he served 26 years as a member of the Rowan County Board of Education, 5 of which as Chair of the Board as well as a member of the Morehead Optimist Club, The Morehead Chamber of Commerce, the Advisory Board of Kentucky Bank, Chair of the St. Claire Medical Center Foundation Board, the board of directors of St. Claire Healthcare, Hepburn Masonic Lodge #576, Valley of Covington Scottish Rite Masons, El Hasa Shrine and the MSU Alumni Association. Bill currently serves as President of the Morehead Optimist Club.

Mr. Redwine and his wife, Susette, have two adult children and two grandchildren.

Course Description

Auxiliary Services

The type of services requested by students today differs from that of their predecessors. The need to change many of the traditional services offered by campus service organizations is significant. Freedom of choice, variety and flexibility are the challenges facing today's service providers. This session focuses on the basic services offered by colleges and universities and the changes that need to occur if customer satisfaction is to be sustained. The types of changes will be discussed including their financial benchmarks. Methods of cost analysis and their financial impact will be discussed. Representatives from three institutions (large, medium, small; public and private) will describe what services are provided by their unit and how auxiliary services supports the mission of their institution. The panelists will also share how auxiliary services has played a role in supporting their institution during COVID-19.



Al Rodack

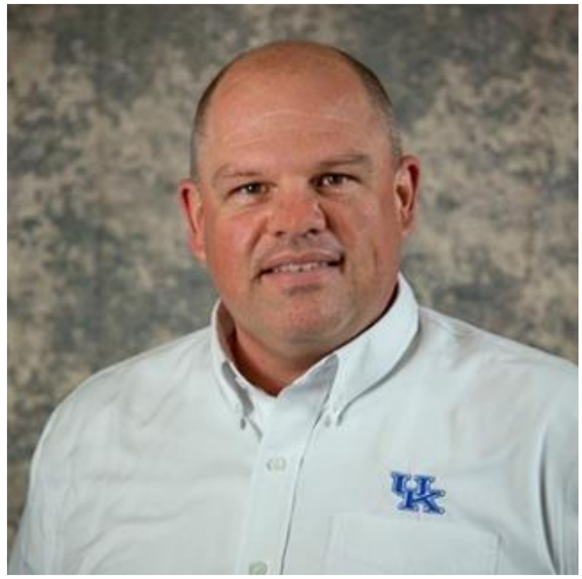
Biography
Al Rodack is Vice President Finance & Administration at Ohio Dominican University. He oversees all Treasury, Investment, Accounting, Facilities and Human Resources operations. Previously he spent 35 years in the Office of the Treasurer at The Ohio State University. His responsibilities included overseeing treasury management, debt management, all non-endowment investments and operations of an internal bank. He also worked with risk management, bursar and accounts receivable. He also worked as an Investment Officer and fixed income portfolio manager for PNC Bank. A Certified Treasury Professional (CTP), Al was on the Board and served as Chairman of the Treasury Institute for Higher Education. He served as Chairman of the Political Action Committee for the Association of Financial Professionals (AFP) and served on the AFP Board of Directors. He is currently on the Board of Directors of the Columbus Medical Association Foundation and the Board of Trustees of the Mount Carmel college of Nursing. Al taught finance classes at Ohio State. He received a B.S. degree in Accounting and an M.B.A. in Finance, both from The Ohio State University.

Course Descriptions
Financial Asset and Liability Management (Treasury Track)
Many institutions manage their financial assets without regard to the liability side of the balance sheet and vice a versa. This class would take a strategic look at how to manage both sides of the balance sheet in tandem to create opportunities and efficiencies in financial performance. Topics would include cash flow forecasting, matching investments with debt, creation of an internal bank and longer-term financial planning.

Stewardship of Gift Funds (Treasury Track)
This course will be a review of endowment and gift funds from the accounting perspective and the development perspective. Topics include similarities and differences between endowment

and gift funds, when is a gift really a gift, tax related issues, receipting and donor recognition, restricted and unrestricted funds, and recordkeeping.

Kevin Sisler, CTP



Biography

Kevin Sisler serves as the Director for Treasury Services in the University Financial Services division at the University of Kentucky. For the past 13 years, Kevin has led the Treasury Services department at UK overseeing deposit operations, cash management, payment card acceptance and the Payment Card Industry Data Security Standards (PCI DSS) Compliance Program. Additionally, he teaches various courses for university staff, including Cash Handling Operations, Imprest Account Management, and PCI DSS Compliance. Kevin is a faculty member of SACUBO's College Business Management Institute (CBMI), having taught PCI DSS Compliance for CBMI since 2012. Kevin regularly presents at various other higher education conferences, such as the Treasury Institute for Higher Education PCI DSS Workshop, Kentucky Public University Business Officers meetings, and the Kentucky Association of Student Receivable Officers conferences. He also serves the Treasury Institute for Higher Education as a member of the PCI DSS Workshop planning committee since 2017. Kevin earned his Master of Business Administration (MBA) from Xavier University and his undergraduate degree in Computer Information Systems from Eastern Kentucky University. In January 2018, Kevin earned his Certified Treasury Professional (CTP) designation from the Association of Finance Professionals. In his spare time, Kevin spends most of his time with his wife and two young daughters, ages 12 and 19.

Course Description

PCI Compliance (Treasury Track)

This course will provide you with an overview of accepting credit cards and other payments on campus, as well as the challenges of complying with the Payment Card Industry Data Security Standards (PCI DSS).

Discussion will include what is PCIDSS and from where did it come, what is required for compliance, and introduction of a roadmap to get your campus in compliance with the standards.

Bob Smith

Biography
Dr. Smith is Senior Associate for Executive Talent and Leadership Development at the University of Tennessee. He is Chancellor Emeritus of the University of Tennessee at Martin (UTM) and President Emeritus of Slippery Rock University of Pennsylvania (SRU). His leadership at both institutions led to significant turnarounds resulting in national commendations and rankings for both educational achievements and organizational performance. He is credited with refocusing the UTM vision resulting in resolving accreditation challenges and leading to the highest retention and graduation rates in the University's history. At SRU, in addition to achieving all-time enrollment, retention, and graduation records, the university was recognized with multiple "Best Places To Work" accolades. He has also held positions at Wichita State University, Princeton University, Ohio University, and Temple University.

Course Descriptions
Developing Your Leadership Capacity from the Inside Out
Getting things done through others depends on leaders creating a vision both for themselves as well as their followers. This session explores the inner dimensions of personal leadership through self-assessments, exercises, and case studies. You will develop in-depth understanding of your personal leadership strengths and weaknesses and develop your personal strategies for improving.

Building Teams to Produce Results
The course offers proven ideas for building teams and improving your team skills. You will leave knowing what a learning organization is and why it is important to your successful leadership. You will learn about your strengths and weaknesses as a team member. You will know how to deal with groupthink and face "wicked problems." You will develop a message to use in helping others understand your leadership style.

Jon Speare

Biography

Jon is an Executive Director of The Treasury Institute for Higher Education, an independent not for profit organization that promotes excellence in treasury and financial management through developing educational programs. In addition to his work with the Institute, Jon was a Managing Director and Group Head for Commonfund, an investment service provider to schools, universities and other not for profit organizations. He had been with Commonfund for over twenty years in various investment and client service roles, including Head of Treasury/Short Term Investments, the Investor Resource Client Service Group, the Strategic Treasury Solutions Team and the Treasury Access Program. During his tenure at Commonfund, the firm has become a leader in treasury management. A major part of Jon's role is to promote educational programs and best practices for larger education institutions.

Prior to joining Commonfund in 1996, Jon was with MAS Funds overseeing Client Service Administration. He was responsible for a client service area of fourteen professionals servicing over seven hundred clients with a total of $10 Billion. Before entering investments, Jon was a Vice President with CoreStates Bank, developing and marketing cash management services to the Education industry. Over his ten years at CoreStates, he was the Relationship Manager the bank's largest not for profit accounts including Temple University, City of Philadelphia and Commonfund.

Jon has been a faculty member with the National Association of College and University Business Officers (NACUBO), the Professional Development Group, the College Business Management Institute and has written articles for Robert Morris Associates, NACUBO, The Association for Financial Professionals' Journal of Cash Management and Commonfund Institute. He has a B.A. from The Colorado College and an M.B.A. from Villanova University. Jon was a trustee of the Crozer Keystone Health System and a Finance Committee member of the Chester Community Improvement Project.

Course Descriptions

Treasury Management (Treasury Track)

Treasury management touches all parts of higher education institutions. The ability to manage financial transactions and operating assets may determine the amount of working capital available as well as the financial health of the university. Participants will gain an understanding of:

- The role of treasury management within a higher educational institution
- How the financial system works in the U.S.
- Fraud in the treasury system and prevention
- Investment of working capital
- An overview of debt strategies, and asset/liability management
- The concept of an Internal or Central Bank within the organization
- Learn how treasury processes interact with entire educational institutions

Fundamentals of Higher Education Investments (Treasury Track)

This session will provide an overview of how higher education entities invest and develop investment policies to achieve the goals of short-term, operating reserve and endowment portfolios. Our discussion will focus on the purpose, policies, and execution of each area of investment. From this session, participants should gain an understanding of the risk management of investment portfolios and the role treasury managers play in the oversight.

Barry Swanson

Biography
Barry Swanson currently serves as Chief Procurement Officer (CPO) at the University of Kentucky. Barry joined UK in 2017 and leads a division that includes a Central Unit, Healthcare Unit, Construction Unit, the UK Supplier Diversity Program, UK Supply Center, and UK Surplus Property. Barry serves on several university committees including the Presidents Sustainability Advisory Committee, the UK Economic Development Collaborative, and the UK Diversity, Equity, and Inclusion Initiative. Barry is also serves as a member of a Community Collaboration that includes local Black Faith Leaders, Commerce Lexington, Lexington Fayette Urban County Government, Fayette County Public Schools, and members of the UK Community.

Prior to taking his position at UK, Barry served as the Associate Vice Provost for Campus Operations/Chief Procurement Officer for the University of Kansas, where he was responsible for leading seven departments – Design and Construction Management, Facilities Services, Parking and Transit, Environmental Health and Safety, the KU Center for Sustainability, Procurement Services, and the Campus Operations Business Center.

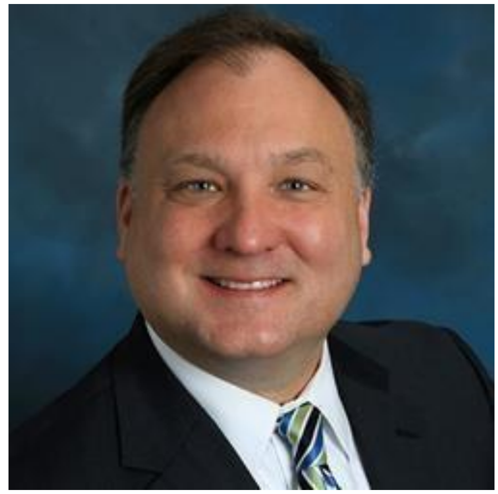
Barry joined KU in 1998 as Director of Purchasing and during his nearly 19-year tenure at KU also served as the Associate Comptroller with responsibility for the Payroll, Bursar, Central Accounting, Financial Management and Financial Systems areas at KU.

Barry has worked in the private sector as Director of Purchasing for Seaboard Farms, in government as a Procurement Officer for the State of Kansas Division of Purchases, and he began his career serving as a staff member in several political offices.

Barry has served as chair of the Purchasing Committee for the Midwestern Higher Education Compact and as the Kansas Board of Regents representative on the State Use Committee, which provides oversight to the Blind and Handicapped Workshop Program in Kansas. He has also served as the District V Representative on the NAEP National Board of Directors, and as co-President of the NAEP Great Plains Region. Barry currently is a member of the Board of Directors for E and I Cooperative Services, Inc. His E and I service includes serving as Board Chair from 2018-2022.

Barry is a graduate of the University of Kansas with a degree in History and Political Science. He also has a Juris Doctor degree from the Washburn University School of Law.

Course Description
Purchasing Policies
This course provides a general overview of the role of purchasing in an institution of higher education, the organization of the purchasing operation, and the responsibility that purchasing has to the campus community and suppliers. Also provided will be a detailed discussion of the fundamental business and ethical principles on which purchasing is based. Emphasis will be given to techniques utilized to achieve the twin objectives of service to the campus community and savings to the institution.



Scott Verzyl

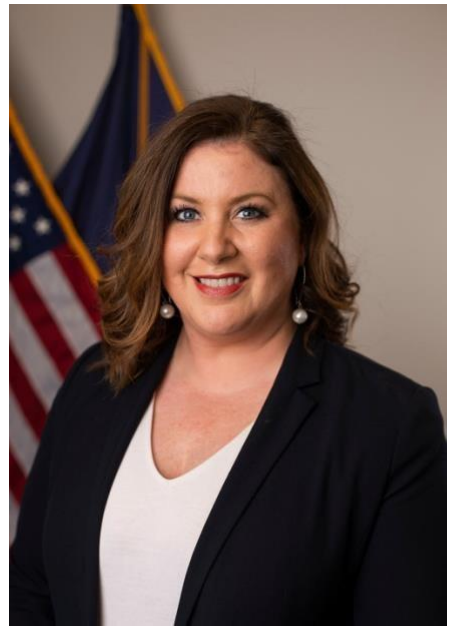
Biography
Scott Verzyl is Vice President for Enrollment Management at the University of South Carolina. He is responsible for Undergraduate Admissions, Financial Aid and Scholarships, University Registrar, the Visitor Center, New Student Orientation, TRIO Programs, Veterans Services and Enrollment Data Analytics. During his tenure at the University of South Carolina he has helped lead the university's efforts to increase overall enrollment and student success outcomes by implementing new recruiting and retention initiatives. Since 2004 undergraduate enrollment at UofSC has grown over 55%, applications to the freshman class have quadrupled, and the size of the freshman class has doubled. Before joining UofSC in 2004, Verzyl held leadership positions at the University of Alabama in Huntsville, including associate vice president for enrollment services, registrar, and director of admissions. He previously was associate registrar and assistant director of admissions at the Georgia Institute of Technology, where he also led the efforts to implement the Banner Student Information System. Verzyl is active in many professional organizations and currently serves on the College Board's Higher Education Enrollment Leaders Group as well as the Oak Circle, the College Board's advisory council for prior members of its Board of Trustees, and EAB's Enrollment Advisory Council. He previously served on the National Association for College Admission Counseling Intercollegiate Athletics Advisory Committee and ACAOPU, the Association of Chief Admissions Officers of Public Universities. He was the recipient of the 2012 National Strategic Enrollment Management Excellence Award from the American Association of Collegiate Registrars and Admissions Officers. Verzyl earned a bachelor's degree from Georgia Tech and an MBA from Kennesaw State University.

Course Descriptions
Student Affairs
Anybody can do Student Affairs, right? That statement might have been true fifty years ago, but in today's highly-functional institution of higher education the work of Student Affairs requires a high degree of professionalism; strong philosophical and educational core values; keen

boundary spanning skills that foster relationship management and collaboration with a long list of internal and external stakeholders; advanced execution of the key functional areas normally assigned to divisions of student affairs; and the ability to manage on behalf of the institution what are often bizarre contingencies (threats and opportunities to one's institution). The student affairs course will explore these concepts. Additionally, the course will provide exposure to the significant issues facing college students and how changes in the characteristics and composition of student populations as well as evolving market and societal conditions affect and make more complicated divisional as well as institutional goals, programs, and services (including those provided by the offices assigned to business affairs). A focus on the trends and issues facing institutions of higher education from the student affairs (functional areas) perspective as well as the organizational and working relationship of student affairs and business affairs will be discussed. The role the senior student affair officer plays in managing the division of student affairs, providing institutional management, molding institutional services, and advancing admissions and retention efforts will be shared. At the conclusion of this session, you may be surprised: not everyone can actually do student affairs work, and in fact, many others don't want to!

Enrollment Management

Enrollment Management Enrollment management can be defined as the strategic technique to manage the quantity, quality, and demographic profile of an institution's first-year class. This course is designed to introduce enrollment management concepts, focusing primarily on admissions, recruiting and financial aid, but including comments on the role retention programs, visitor programs and tour centers, orientation, academic advising, career centers, transfer programs, institutional research, and student success services contribute to the achievement of enrollment goals. Once a concern for mostly private institutions; the management of enrollments has become a key factor for both the ranking status and the financial health of virtually all institutions of higher education. This course will provide the "fundamentals" of enrollment management, including the ingredients for a successful strategic enrollment plan, and will share trends, issues and techniques institutions of higher education are using to manage their enrollment.



Laurel Wood

Biography
Laurel Wood is University of Kentucky's Director of Business Continuity. She began serving with UK Police Department's Division of Crisis Management & Preparedness in 2011. She oversees business continuity, disaster recovery, UK's 5-year Hazard Mitigation Plan, and the Campus Community Emergency Response Team. Her career began serving a 17 county, 33 city planning and development organization, then managed FEMA preparedness projects on behalf of Kentucky Office of Homeland Security. A Kentucky native, Laurel is a graduate of Morehead State University and University of Kentucky's Martin School of Public Policy & Administration.

Laurel has a background in developing Emergency Operations and Business Continuity Plans, Incident/Event Action Plans, After-Action Reports, Business Impact Analysis, Threat and Hazard Identification Risk Assessments, crisis communications, and Homeland Security Exercise & Evaluation Program exercises. She is a FEMA Professional Continuity Practitioner and holds a National Center for Spectator Sports Safety & Security (NCS4) Professional Certificate. Laurel is also a certified Project Management Professional (PMP) from the Project Management Institute (PMI) and is a member of Disaster Recovery Institute International (DRI).

Course Description
Business Continuity for Higher Education
We are not planning for every possibility that could cause an interruption; instead, we are planning for the effects of any interruption. In this session, University of Kentucky's Director of Business Continuity will take you through building an all-hazards business continuity program that puts planning in perspective and creates an environment where crisis response is likely to run more smoothly, maximum service levels are maintained, and recovery is managed efficiently and effectively.

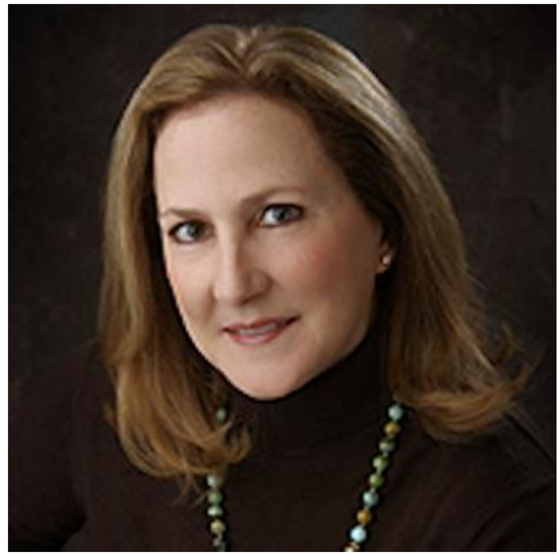
Take away lessons learned from reviewing the challenges and successes associated with building a BC program. Implement an effective strategy to develop appropriate departmental plans and determine how those are incorporated into emergency operations center (EOC) activation criteria. Be proactive in cultivating relationships so that stakeholder identification and prioritization during critical incidents can help you return to normal operations as quickly as possible. Finally, find your business continuity champions and utilize them!

Sally Wiatrowski

Biography
Sally Wiatrowski is the Vice President for Business Operations at Georgetown College and responsible for the operational activities for the institution, ensuring development and implementation of efficient operations and cost-effective systems to meet current and future needs of the campus community. Before devoting her work full-time to Georgetown College, Sally, was the Director of Retail Operations for the Follett Corporation, with assignments at the University of Kentucky, Notre Dame and De Paul Universities. Sally is a focused and determined business leader, offering the entrepreneurial stamina and wisdom to achieve operational results and drive bottom line growth. She inspires employees to achieve peak performance, and she cultivates profitable business relationships built on respect, loyalty, and trust. Her easy-going personality has been a defining management strategy throughout her career.
Outside of the office, Sally is a wife to Michael, and mother to Sophia and Eva.

Course Description
Auxiliary Services
The type of services requested by students today differs from that of their predecessors. The need to change many of the traditional services offered by campus service organizations is significant. Freedom of choice, variety and flexibility are the challenges facing today's service providers. This session focuses on the basic services offered by colleges and universities and the changes that need to occur if customer satisfaction is to be sustained. The types of changes will be discussed including their financial benchmarks. Methods of cost analysis and their financial impact will be discussed. Representatives from three institutions (large, medium, small; public and private) will describe what services are provided by their unit and how auxiliary services

supports the mission of their institution. The panelists will also share how auxiliary services has played a role in supporting their institution during COVID-19.



Mary Vosevich

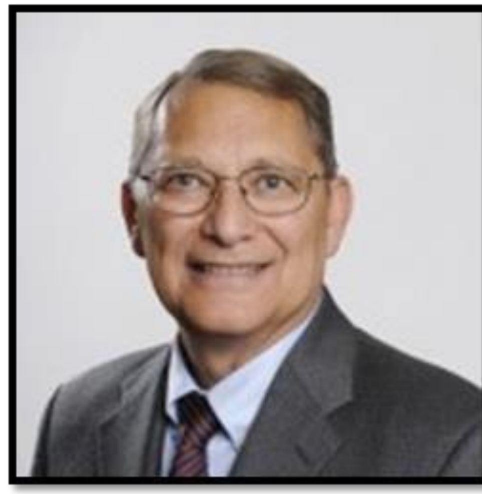
Biography
Mary Vosevich (she/her) has worked in higher education facilities management for 36 years. In 2014 she joined the University of Kentucky as the Vice President for Facilities Management. Previously she worked at the University of New Mexico and the University of Missouri – St. Louis. She was Director of the Physical Plant Department at the University of New Mexico. Vosevich was also Vice President of Lobo Energy, Inc. a corporation of the University which oversees all master planning for utilities at the University.

Vosevich has been involved with the higher education community for the past 30 years. She has served APPA, Leadership in Educational Facilities, in many capacities including as president. Currently she serves as the Dean of General Administration for the Institute for Facilities Management; a position she has held since 2003. She also teaches at the Institute. Vosevich is a graduate of the APPA Institute for Facilities Management and Leadership Academy. She holds a Bachelor of Science from the University of Missouri and a Master of Business Administration from the University of New Mexico. She has always been active in her community and prior to moving to Kentucky served as the Vice President of Camps and Properties for the Great Southwest Council of the Boy Scouts of America. This position directed the master planning and renovation of the Gorham Scout Ranch in New Mexico.

Vosevich was honored with APPA's Pacesetter Award and Meritorious Service Award.

Course Description
Facilities Management

This course presents an overview of functions, organization and management of a facilities unit in higher education. Topics to be discussed with be general administration, operations and maintenance, utilities and planning, design, and construction. A tour of University of Kentucky facilities is included.



Mike Zastrocky

Biography
Dr. Michael Zastrocky is currently Executive Director of the Leadership Board for CIOs in Higher Education. He has recently served as a Senior Advisor to The Chronicle of Higher Education and has done webinars and written white papers based on the LBCIO annual global survey of CIOs. He also has served as Managing Vice President, Education Research Leader and Research Director for Academic Strategies at Gartner Inc, the world's largest information technology research and advisory services organization. In his current and recent roles, Dr. Zastrocky examines and analyzes current and emerging IT trends and assesses the implications of those trends on educational institutions globally; He also examines higher education management issues and how institutions can effectively and efficiently manage organizations. Before joining Gartner, he served as a faculty member at several universities, assistant dean, chief information officer, vice president of CAUSE (the international association for managing and using information resources in higher education, now EDUCAUSE), and vice president of the Kaludis Consulting Group. He has delivered numerous keynote addresses around the globe and has served as a faculty member for many institutes and seminars globally. He has written or co-authored numerous books, modules, research notes, and articles on information technology, mathematics, and management issues. He has served as a university trustee, school board member and a board member for both non-profit and for-profit education organizations around the globe. He has a bachelor's degree from Regis University in mathematics, a master's degree in education administration from the University of Denver, and a doctor of education degree in technology and mathematics education from the University of Northern Colorado.

Course Description
Administrative Systems
This course will review the life cycle of administrative systems in light of changing technology and business requirements. Particular attention will be given this year to business process

changes, organizational changes and what needs to be done when doing the business of higher education online and in the cloud. We will look at how technology and networking changes will likely impact current and future information needs and systems and possible security risks that must be addressed. The course will investigate systems requirements, definition and analysis, specifications and standards, project management and return on investment decisions. A review of current options and strategies will include both national and global trends using data from the 2019 LBCIO survey of CIOs. Current best practices will be explored and discussed.

Course objectives:
This course will review the life cycle of administrative systems in light of changing technology and business requirements. Particular attention will be given this year to business process 67 changes, organizational changes and what needs to be done when doing the business of higher education online and in the cloud. We will look at how technology and networking changes will likely impact current and future information needs and systems and possible security risks that must be addressed. The course will investigate systems requirements, definition and analysis, specifications and standards, project management and return on investment decisions. A review of current options and strategies will include both national and global trends using data from various sources. Current best practices will be explored and discussed.