

**SACUBO**

**2022 ANNUAL  
MEETING**

*Facing the Future—Together*

**MAY 8–10**

**SAN ANTONIO, TX**

Sponsored By



# SCHEDULE AT A GLANCE

## SUNDAY, MAY 8

10:00 am - 5:00 pm	Registration and Information Open
12:00 - 12:50 pm	Sunday Sessions I
1:00 - 1:50 pm	Sunday Sessions II
2:00 - 2:50 pm	Sunday Sessions III
2:50 - 3:10 pm	Break
3:10 - 4:00 pm	Sunday Sessions IV
4:10 - 5:00 pm	FASB/GASB Sessions
5:30 - 6:00 pm	First Time Attendee Reception
6:00 - 8:30 pm	Opening Dinner Reception - Buckhorn Saloon and Museum

## MONDAY, MAY 9

7:00 am - 5:00 pm	Registration Open
7:30 - 8:30 am	Breakfast in the Exhibit Hall
8:30 - 10:00 am	Welcome, Best Practice Awards, and General Session #1
10:10 - 11:00 am	Concurrent Sessions I
11:00 - 11:30 am	Break in the Exhibit Hall
11:30 am - 12:20 pm	Roundtables
12:20 - 1:30 pm	Lunch
1:30 - 3:00 pm	Ice Cream Social in the Exhibit Hall
3:00 - 3:50 pm	Concurrent Sessions II
4:00 - 4:50 pm	Concurrent Sessions III
4:50 - 5:50 pm	Happy Hour in the Exhibit Hall
8:30 - 10:30 pm	Tequila Nightcap Cantina

## TUESDAY, MAY 10

7:30 am - 3:00 pm	Registration Open
7:30 - 8:30 am	Breakfast in the Exhibit Hall
8:30 - 10:00 am	Welcome, Distinguished Service Award, and General Session #2
10:10 - 11:00 am	Concurrent Sessions IV
11:00 - 11:30 am	Break in the Exhibit Hall
11:30 am - 12:20 pm	Concurrent Sessions V
12:20 - 1:30 pm	Lunch and SACUBO Business Meeting
1:30 - 2:30 pm	Dessert in the Exhibit Hall
2:30 - 3:20 pm	Concurrent Session VI
3:30 - 4:20 pm	Concurrent Session VII
4:20 - 5:20 pm	Closing Reception

# CONTENTS

Welcome Letter	<b>4</b>
Board of Directors	<b>5</b>
Professional Development Committee	<b>7</b>
Best Practices Awards	<b>8</b>
Distinguished Service Award	<b>9</b>
2022 Annual Meeting Sponsors	<b>10</b>
Technology Information and How to Check In/Out for CPEs	<b>11</b>
Networking Events	<b>12</b>
General Program	<b>14</b>
Get Involved	<b>19</b>
General Program (continued)	<b>20</b>
Stay in Touch	<b>39</b>
Quick Glance Program Grid	<b>40</b>
Upcoming Events	<b>42</b>
Hotel Floor Plan	<b>43</b>
Exhibitor Listing	<b>44</b>



**May 8, 2022**

**Dear Colleagues:**

Welcome to the Marriott Rivercenter in historic San Antonio! We are pleased to welcome you to our first in-person Annual Meeting in three years. Whether this is your first time attending a SACUBO conference or you are a long-time attendee, I believe this experience will prove valuable to your professional career.

As always, SACUBO promises to deliver an engaging and timely agenda. Our Professional Development and Constituent Committees have planned many opportunities for your professional growth. After connecting with your colleagues and participating in educational sessions, you will return home with countless ways to foster, support, and implement new ideas on your campus.

I would also like to thank our business partners and exhibitors for joining us in Texas. We appreciate their support and engagement. Please utilize this opportunity to learn about new resources to facilitate your work.

The SACUBO Annual Meeting offers something for everyone. Do not overlook occasions to meet new colleagues and expand your network of peers. I hope you find the experience rewarding personally and professionally.

Thank you for participating this year.

Wishing you all the best,

**SUSAN MADDUX**  
**SACUBO PRESIDENT**

# SACUBO BOARD

## 2021-22

### **PRESIDENT | SUSAN MADDUX**

*Vice President for Finance and Administration,  
Furman University*

### **FIRST VICE PRESIDENT | JOHN CRAWFORD**

*Vice President for Finance and Chief Financial Officer,  
Texas A&M University*

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*Senior Vice President of Administration and Finance and Chief  
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*Senior Lecturer, School of Accountancy, Clemson University*

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*Associate Vice Chancellor, University of Tennessee  
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*Assistant Vice President, Controller and Treasurer,  
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### **PROFESSIONAL DEVELOPMENT COMMITTEE, CO-CHAIR | JAMIE LOFTIN**

*Assistant Vice Provost for Distance Education Administration,  
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# SACUBO BOARD 2021-22

## **AT LARGE (COMMUNITY COLLEGES) | DEBBIE WALKER**

*Vice President for Business Affairs,  
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## **AT LARGE (SMALL INSTITUTIONS) | UNDRIA STALLING**

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*Chief Accounting Officer/Controller,  
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## **COMPREHENSIVE & DOCTORAL INSTITUTION CONSTITUENT COMMITTEE CHAIR | VALARIE VAN VLACK**

*Treasurer, Texas State University*

## **RESEARCH INSTITUTION CONSTITUENT COMMITTEE CHAIR | KELLY EPTING**

*Associate Vice President for Finance, University of South  
Carolina Columbia*

## **SMALL INSTITUTION CONSTITUENT COMMITTEE CHAIR | CHRIS GARDNER**

*Chief Financial Officer, Wofford College*

# SACUBO PROFESSIONAL DEVELOPMENT COMMITTEE 2021-22

**KEVIN EDELBLUTE, CO-CHAIR**

*Mississippi State University*

**JAMIE LOFTIN, CO-CHAIR**

*University of Arkansas*

**MYRA GOODWIN, NASBA COORDINATOR**

*Arkansas State University*

**JOHN CRAWFORD**

*Texas A&M University*

**DARRELL DUNCAN**

*Lipscomb University*

**RANDY ELLIS**

*Virginia Community College System*

**KELLY EPTING**

*University of South Carolina*

**CHRIS GARDNER**

*Wofford College*

**RUSS HANNAH**

*Arkansas State University*

**SUSAN MADDUX**

*Furman University*

**JULIE PARRISH**

*Medical University of South Carolina*

**NOEL SLOAN**

*Texas Tech University*

**VALARIE VAN VLACK**

*Texas State University*



# 2022 BEST PRACTICES AWARDS

The Best Practices Program showcases the best of college and university business officers' efforts in creating better, more efficient, and customer-friendly business practices. Past submissions have showcased a wide variety of unique programs improving the operations of the college campus. Submission deadlines and guidelines can be found on the SACUBO website. Please consider submitting a Best Practices Program for next year's annual meeting.

The following are the four finalists presenting their "Best Practices" at this year's annual meeting:

- Baylor University -- Training Adaptations: Adjusting to a Changing Environment
- Spartanburg Methodist College -- The Pioneer Way - Bringing Dining Services In-House
- Texas A&M University – San Antonio -- A&M-San Antonio CARES!
- The University of Alabama -- Transforming Compliance Training

**The winner of the Best Practices Program will be announced at the general session on Tuesday, May 10. The winner will receive an honorarium of \$1,500, and runners-up will receive \$750 each.**

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# 2022 SACUBO DISTINGUISHED SERVICE AWARD

Debra Ross has served the University of Kentucky, SACUBO and CBMI with honor for many years. She has distinguished herself through her service to the SACUBO Board by serving as both Chair and Co-Chair of the Professional Development Committee, and by serving as the Board representative for the College Business Management Institute (CBMI). Additionally, Debra was instrumental in planning the 2019 SACUBO Fall Workshop in Lexington.

Debra has served the University of Kentucky with honor as Assistant and Associate Director of Auxiliary Services for many years in the Student Life (Housing) area, as well as serving as Professional Development Coordinator for numerous CBMI sessions.

Debra's latest service to UK included serving on the Health Corps Facilities Team, a unit specifically established to care for Students in (COVID) Isolation Housing. Debra's compassion for her customers, as well as her dedication to the Higher Education Industry is to be commended.



**Please join us in congratulating Debra Ross on being chosen as the SACUBO 2022 Distinguished Service Award recipient.**



# 2022 ANNUAL MEETING SPONSORS

## Executive Level



## President Level



Life Is On



## Director Level



RAYMOND JAMES



## Associate Level

APOGEE



J.P.Morgan



# TECHNOLOGY INFORMATION

Wifi is Available Throughout the Meeting Space

Network: SACUBO2022

Password: PFMSACUBO

The Mobile App is your one stop shop to access information about the meeting, download presentations, check in to earn CPE credit, and connect with fellow participants.

Go to the App Store or Google Play and search for "SACUBO". Then select SACUBO 2022 Annual Meeting and tap "download". If you already have the SACUBO app on your device, open it, and tap "Exit to Event List" from the dashboard to view the app for this event.

**For any issues, contact [support@core-apps.com](mailto:support@core-apps.com)**

## NEED CPEs?

**The Mobile App is Here to Help.  
Here's What To Do!**

### Earn up to 15 CPE credits for the Annual Meeting

- Attend the Session for at least 50 minutes
- Use the Mobile App-Check In and Out of each session
- **To Check In (available beginning 15 minutes prior to each session)**
  - **Click on the "CPE Check In/Out" tile on the homepage**
  - **Select the session title**
  - **Enter your information (you will only need to do this once)**
  - **Select Check In Now**
- **To Check Out**
  - **Go back to the "CPE Check In/Out" tile on the homepage**
  - **Press "Check Out" and enter code posted in the room**
- Cool feature: Email yourself a receipt confirmation of participation
- Credit will not be awarded if you check in more than 10 minutes after the scheduled start time and/or do not check out within 5 minutes of the end of the session.
- Visit the registration desk if you have any issues
- CPE certificates will be available within 30 days after the program

The Southern Association of College and University Business Officers (SACUBO) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [NASBAregistry.org](http://NASBAregistry.org).



# NETWORKING EVENTS

## SUNDAY, MAY 8

**5:30-6:00 pm**

### **First Time Attendee Reception at the Buckhorn Saloon and Museum**

Is this your first time at a SACUBO event? Join us for an early reception at the Buckhorn Saloon and Museum.

**6:00-8:30 pm**

### **Welcome Dinner Reception at the Buckhorn Saloon and Museum**

Kick off your (cowboy and cowgirl) boots and stay awhile! Or Kick UP your boots and dance to the music and the full Texas experience under one roof.

From the exotic animal collection and The Texas Ranger Museum to the saloon - it's no wonder that The Buckhorn Saloon and Museum has become one of the biggest attractions in downtown San Antonio.

Anchored in Texas history, The Buckhorn Saloon Museum offers the full Texas experience.

### **Transportation Provided: Take the scenic route by riverboat or enjoy a short stroll (riverboat and walking maps provided in the mobile app)**

**Riverboat:** begins at 5:00pm for the First Time Attendee Reception and 5:30pm for the Welcome Dinner Reception

Follow the signs to the Marriott Riverwalk landing where you will board the scenic riverboat. You'll disembark about a block from the Buckhorn Saloon and Museum. Signs will direct you to the reception.

**Walking:** A short 10-minute stroll.

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## MONDAY, MAY 9

**1:30-3:00 pm**

### **Ice Cream Social in the Exhibit Hall**

Grand Ballroom Salons G-M

Sweets for the sweet! Head on over to the Exhibit Hall for an old-fashioned ice cream social.

## MONDAY, MAY 9 (CONTINUED)

**4:50-5:50 pm**

### **Happy Hour in Exhibit Hall**

Grand Ballroom Salons G-M

This networking event includes a variety of appetizer options and an open bar. Visit with each exhibitor and learn more about products and services that may help your institution. Please take a moment to thank the exhibitors for their participation and support of the SACUBO 2022 Annual Meeting.

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**8:30 - 10:30 pm**

### **Tequila Nightcap Cantina**

Conference Rooms 20-21 and Terrace

Wind down your Monday evening at the Tequila Nightcap Cantina, sponsored by Aramark. From 8:30pm to 10:30pm, enjoy a relaxing end to your busy day with specialty tequila cocktails, beer, wine, and light San Antonio-style snacks.

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## TUESDAY, MAY 10

**1:30-2:30 pm**

### **Dessert in the Exhibit Hall**

Grand Ballroom Salons G-M

Head on over to the Exhibit Hall for dessert and one last time to visit with our Exhibitors.

**4:20-5:20 pm**

### **Closing Reception**

Conference Rooms 20-21 and Terrace

Join your colleagues and new friends to share what you have learned over the last three days. Make sure you exchange contact information to keep your network going.

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# SUNDAY, MAY 8

**10:00 am - 5:00 pm**

**Registration and Information Open**

Registration Desk Grand Ballroom Lobby

**12:00 - 12:50 pm**

**Discover What You Didn't Know: How IoT Technology Empowers Data-Informed Facilities Management**

Grand Ballroom Salons E-F

*Phyllis Rushing, Alabama Agricultural and Mechanical University*

*Mike Irvin, Aramark*

*Katie Boyle, Aramark*

Most colleges and universities schedule staff and condition spaces equally every day, but data shows not every space is occupied equally and spaces don't have the same servicing needs. Alabama A&M University embraced Internet of Things (IoT) wireless sensor technology to improve facility services. Sensors allow remote monitoring of space utilization to empower demand-driven cleaning and maintenance needs—while allowing the institution to allocate limited resources efficiently and effectively. This session will bring new insight to facilities planning and decision-making. Discover how combining campus building intelligence with operational expertise, drives efficiencies, improves productivity, and increases student satisfaction.

**1 CPE: Information Technology**

**1:00 - 1:50 pm**

**Concurrent Sessions**

**Accessing Capital for Sustainability, Efficiency & Deferred Maintenance: Contrasting P3, EaaS, Performance Contracting and Guaranteed Savings**

Grand Ballroom Salon A

*Wayne Johnson, Duke Energy*

Reining in the cost of Higher Education has traditionally left facilities shorthanded in retiring inefficient assets and funding deferred maintenance. Campuses now have a new set of ESG initiatives that need funding as well. This session will compare traditional funding and procurement models with new trends in facilities operation and finance – then discuss the impact each has on long term success, operations, and risk. Attendees will leave with a fresh perspective on new financial models and the innovations available for facilities reform and sustainability financing. This session will be led by Wayne Johnson, a Higher Ed. Chief Facilities Officer of 30 years turned energy and sustainability management professional. As an interactive event, Wayne will facilitate as attendees discuss their needs.

**1 CPE: Management Services**



**SUNDAY,  
MAY 8**

**Begin with a Foundation of Trust**

Grand Ballroom Salons E-F

*Joel Bittick, OneStream Software*

*Steve Lott, OneStream Software*

Join OneStream as we discuss how a modern platform for Higher Education can move your teams past the chaos of multiple sources, manually aggregated, and frequently edited data, into the creation of a foundation of trust, built upon a single source of truth. With a primary focus on planning and budget, also touching upon forecasts and reporting, this session will discuss many of today's existing challenges as we share positive outcomes experienced by finance leaders utilizing advances in technology to become more agile while focusing on institutional priorities.

- Trust that your numbers are accurate
- Trust that your communication is clear
- Trust that your work is transparent
- Trust that you have reduced operational and financial risk
- Trust that you have improved cost effectiveness

**1 CPE: Management Services**

**2:00 - 2:50 pm**

**Concurrent Sessions**

**NACUBO 101: Getting to Know Your National Association**

Grand Ballroom Salons A

*Susan Scroggins, Valparaiso University*

*Randy Roberson, NACUBO*

*Tadu Yimam, NACUBO*

Since 1962, NACUBO has been an indispensable source of clear, trusted knowledge for campus leaders. NACUBO membership offers many benefits and opportunities for higher education business professionals to grow, thrive, and flourish in a challenging and ever-changing environment. Join this session to connect with Susan Scroggins, Chairperson of NACUBO's Board, NACUBO staff and your higher education colleagues to explore how NACUBO can help you ensure the success of your institution.

**1 CPE - Specialized Knowledge**

**2:00 - 2:50 pm**

**Concurrent Sessions (continued)**

**The Financing Process and Beyond: A Student Experience That Connected the Capital Markets to the Classroom**

Grand Ballroom Salons E-F

*Chuck Ellingsworth, Raymond James*

*Trey Casey, Raymond James*

*Bjorn Reigle, PFM*

*Susan Maddux, Furman University*

Learn how Furman University and the financing team determined the optimal financing structure for the University while collaborating with professors and students to integrate the financing process with a student education experience.

**1 CPE: Finance**

**2:50 - 3:10 pm**

**Break**

Grand Ballroom Lobby

**3:10 - 4:00 pm**

**Concurrent Sessions**

**Investment Policy Parameters and Seasonal Cash Investing in a Rising Rate Environment**

Grand Ballroom Salons A

*Keri Gawrych, Truist Bank*

*John Lynch, Truist Bank*

*Maxwell J. Anthony, Sterling Capital Management*

*Corey Byrd, Sterling Capital Management*

*Chris Gardner, Wofford College*

This interactive panel discussion will be led by John Lynch, Senior Vice President and Education Industry Consultant for Truist Bank. The panel will explore cash investment strategies for seasonal and core cash including investment policy parameters that support the strategy. This session will expand on how a bank view's cash and unrestricted liquidity and how this ultimately impacts college and university credit strength. Participants will be provided with thoughtful ideas on how to view investing cash during a rate tightening cycle including practical experiences from Chris Gardner, Chief Financial Officer at Wofford College.

**1 CPE: Management Services**

**Transforming Long-Range Planning at Mississippi State University**

Grand Ballroom Salons E-F

*Solomon Scichowski, TruED Consulting*

*Amy Burchfield, Mississippi State University*

*Michael Ketchum, Mississippi State University*

Long Range Planning is becoming increasingly vital among higher education institutions as the need for optimizing projections has become a strategic focal point. Mississippi State University has begun their Connected Planning journey



with Anaplan to help their university ensure financial stability through robust scenario analysis and modeling that provides visibility over key financial ratios and metrics. During this presentation you will have an opportunity to learn how your institution can provide a world-class long-range planning system to stay ahead of the curve.

**1 CPE: Finance**

**4:10 - 5:00 pm**

**Concurrent Sessions**

**FASB A&A Update for Private Institutions**

Grand Ballroom Salons A

*Matthew Socha, Cherry Bekaert LLP*

This session will provide you with an update on the latest development of new and proposed accounting standards issued by the Financial Accounting Standards Board (FASB) that impact private higher educational institutions and related foundations.

**1 CPE: Accounting**

**Are You Keeping up with the GASB?**

Grand Ballroom Salons E-F

*Teresa Edwards, Texas A&M University System*

*Chris Leach, NACUBO*

This session will define our current accounting hierarchy, acquaint us with our current GASB Board members, provide a list of technical experts at NACUBO and review new accounting standards. We will provide real life examples of GASB 87-Leases, GASB 96 EBIT (software) and GASB 94-Public Private and APA Arrangements challenges, which are being implemented in 2022 and 2023. Discuss software solutions. Discuss upcoming standards, which will begin to change some of our defining principles of accounting. To successfully implement these standards, the accounting offices need executive management's support, strong accounting expertise and access to our peer institutions for ideas and solutions. As accounting professionals, we also need to operationalize complex standards while easing the burden for our departmental users.

**1 CPE: Accounting (Governmental)**

**5:30 - 6:00 pm**

**First Time Attendee Reception at the Buckhorn Saloon and Museum**

(see mobile app for transportation directions)

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**6:00 - 8:30 pm**

**Opening Dinner Reception at the Buckhorn Saloon and Museum**

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**Walking:** A short 10-minute stroll.

**Sponsored By**



## GET INVOLVED

SACUBO is a volunteer-led organization and relies on the contribution of leadership skills, expertise, and time from its members. Association members are recruited annually to serve on the SACUBO board and committees. Volunteers meet both in-person and virtually throughout the year. If you are interested in supporting the mission of SACUBO, donating your time and talents, and networking with your colleagues, we encourage you to visit our Volunteer with Us webpage. Scan the code below for more information.

**Scan the code below for more information.**



## VOLUNTEER INFO

# MONDAY, MAY 9

**7:00 am - 5:00 pm**

**Registration and Information Open**

Registration Desk Grand Ballroom Lobby

**7:30 - 8:30 am**

**Breakfast in the Exhibit Hall**

Grand Ballroom Salons G-M

**8:30 - 9:00 am**

**Welcome, Opening Remarks and Best Practices Awards**

Grand Ballroom Salons E-F

**9:00 - 10:00 am**

**General Session - Shayla Rivera**

Grand Ballroom Salons E-F

Shayla Rivera is an Aerospace Engineer and former Rocket Scientist with NASA turned corporate trainer, Int'l Speaker, TEDx Speaker, TV & Radio Host, Emcee/Host, Comedian, Actor, Writer, Seminar Facilitator, Panel Moderator, and Awareness Expert. As of 2017, Rivera is also Director of the ENGR[x] (pron. Engineering X) program and Professor of Practice for the College of Engineering at Texas A&M University.

Rivera was born and raised in Puerto Rico. After obtaining a degree in Aerospace Engineering with a minor in Psychology at Texas A&M University, she spent 5 years working with NASA. From there she moved on to stress management corporate training and motivational speaking, where Rivera discovered her comedic talents.

A self-proclaimed Awareness Expert, Rivera has come to know one basic truth, "The best way to learn, grow and change, in other words be enlightened, is to lighten up." Approaching very serious subjects with a very light heart, Rivera helps young and old alike become clear about the personal beliefs that might be getting in the way of their real desires.

With numerous awards and accolades throughout her engineering, speaking, and comedy careers, Rivera is not easily placed in just one category or class, she defines her own. As of 2020, Rivera has a half-hour stand-up comedy special streaming on HBO Max. She has appeared on numerous television programs and networks, including Comedy Central & HBO Latino, was named "Funniest Latina Comedian" by the organization "Latin 2015," and serves as host/emcee for award shows, gala's, fundraisers, and festivals. Rivera is most proud of her tours to entertain U.S. troops in Iraq and around the world.

Rivera says, "My number one goal is to inspire through laughter."

**1 CPE: Personal Development**

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**MONDAY,  
MAY 9**

**10:10 - 11:00 am**  
**Concurrent Sessions**

**Best Practices: Transform Your Compliance Training**

Conference Rooms 3-4

*Jennifer Clark, The University of Alabama*

*Marcy Huey, The University of Alabama*

This session focuses on how to work with stakeholders to streamline and customize your training to make it more efficient and effective.

**1 CPE: Management Services**

**More than Debt: How CFO's Can Engage their Financial Advisors as Strategic Partners**

Conference Rooms 1-2

*Joshua Lassiter, First Tryon Advisors*

*Rob Ketner, First Tryon Advisors*

*Bob Shea, UNC-Greensboro*

*Paul Forte, UNC-Greensboro*

What's a Financial Advisor? Why do I need one? As a CFO, what level of support should I expect from my advisor? This session, led by two veteran CFO's, will examine how university finance leaders can tap into the expertise of their financial advisors before, during, and long after a debt transaction takes place. In this session, you will hear how UNCG was able use an innovative refunding structure to fund a MM, high-priority capital project without incurring any additional debt or spending down its balance sheet. The session will also examine a 3M P3 student housing project at Appalachian State and the flexibility afforded to leadership by using multi-phased approach to construction. Lastly, the session will discuss UNCG's recent success in implementing budget and planning models that have improved senior leadership's access to real-time data.

**1 CPE: Finance**

**Navigating Presidential Transitions**

Grand Ballroom Salon D

*Nick Wallace, BKD CPA's and Advisors*

*Tim Judd, Campbellsville University*

In this interview, we will explore presidential transitions - pitfalls and best practices. We will hear from an experienced former college president what works and what doesn't work when making a transition including how to execute a smooth onboarding process and how to say good-bye to an outgoing president.

**1 CPE: Specialized Knowledge**

**10:10 - 11:00 am**

**Concurrent Sessions (continued)**

**Wait, Where are They? Managing Compliance for Internationally Located Students and Faculty**

Grand Ballroom Salon A

*Patty Milner, University of Arkansas*

*Cleston Murray, University of Arkansas*

How do you determine if an employee can work while located in another country? Are there tax implications for collecting tuition or paying faculty across country borders? How do you make determinations for students who want to study with your university while located internationally? Whose job is it to answer these questions, anyway?

At the University of Arkansas, we have utilized our best practices for state authorization and a team-based approach to research and advise on compliance obligations for instructors and students located abroad while teaching and learning.

As with state authorization, there are specifics about each country to evaluate. From Digital Service Taxes to Digital Nomad Visas, we will discuss our process and the best practices we have developed to bolster our research and review process for internationally located students and faculty.

**1 CPE: Specialized Knowledge**

**Washington Update from NACUBO**

Grand Ballroom Salons B-C

*Liz Clark, NACUBO*

Explore the current state of play in the nation's capital, discuss the forecast for issues that will take shape in the coming months, consider the outlook for the 2022 elections, and examine what could lie ahead for colleges and universities.

**1 CPE: Specialized Knowledge**

**11:00 - 11:30 am**

**Break in the Exhibit Hall**

Grand Ballroom Salons G-M

**11:30 am - 12:20 pm**

**Roundtables**

**Community Colleges**

Conference Rooms 3-4

*Randall Ellis, Virginia Community College System*

Join us to catch-up on current Community College issues and concerns and to share ideas that relate specifically to Community Colleges.

**1 CPE: Specialized Knowledge**

**11:30 am - 12:20 pm****Roundtables****Comprehensive and Doctoral Institutions**

Conference Rooms 1-2

*Valarie Van Vlack, Texas State University*

Please join us for an interactive round table discussion on topics that impact comprehensive and doctoral campuses.

**1 CPE: Specialized Knowledge****Research Universities**

Grand Ballroom Salon A

*Kelly Epting, University of South Carolina**Gene Crouch, George Mason University*

This open forum will cover important topics to research universities. Share your institution's best practices and ask others how they are managing in today's challenging environment. Are you growing your research enterprise? How are the pressures tuition and fees impacting your ability to maintain quality instruction? What business model are you using and are you satisfied? Come ready to participate and network with others from our largest institutions.

**1 CPE: Specialized Knowledge****Small Institutions Roundtable**

Grand Ballroom Salon D

*Chris Gardner, Wofford College*

Participants from small institutions will gather to engage in a roundtable discussion pertaining to current issues, trends and challenges facing smaller higher education institutions in the coming months and years.

**1 CPE: Specialized Knowledge****12:20 - 1:30 pm****Lunch**

Grand Ballroom Salons G-M

**1:30 - 3:00 pm****Ice Cream Social in the Exhibit Hall**

Grand Ballroom Salons G-M

Sweets for the sweet! Head on over to the Exhibit Hall for an old-fashioned ice cream social.

**3:00 - 3:50 pm****Concurrent Sessions****Back to the Basics on Fraud & Ethics**

Grand Ballroom Salon D

*Kevin Robinson, Auburn University*

This session will go back to the basics of fraud and ethics related issues facing higher education. We will look at specific cases that have recently occurred in higher education and what we can learn from them. Finally, we will discuss how fraud and ethics issues may have changed in the pandemic and ways you can work toward proactive prevention.

**1 CPE: Behavioral Ethics**

3:00 - 3:50 pm

**Concurrent Sessions (continued)**

**Best Practices: The Pioneer Way - Bringing Dining Services In-House**

Conference Rooms 3-4

*Trey Arrington, Spartanburg Methodist College*

SMC had been partnered with one of the large dining services vendors for nearly 30 years. In 2017, our new President stated that he wanted to create a culture of "student first, student always" in everything we did. As each member of the leadership team began to focus on this goal within their areas, one of those areas was SMC Dining Services. After spending an academic year trying to change that culture with the third-party vendor, we decided it was time for a change. Our five-year plan was to eventually bring Dining Services in-house, but we needed to learn more about what a successful dining program could look like on a small, nimble campus like SMC. We terminated our contract with that vendor and signed a new contract with a third-party college dining services vendor that only worked with small, religiously affiliated institutions. The dining program greatly improved in years one and two, but there were still limitations to what that vendor was willing to do, based on their closed-book budget. In Spring of 2020, with the COVID pandemic hitting the world, we turned our focus to what Fall of 2020 would look like. We knew this was the time to bring Dining Services in-house, and we made that decision.

**1 CPE: Specialized Knowledge**

**Best Practices: Training Adaptations: Adjusting to a Changing Environment**

Conference Rooms 1-2

*PaToya Hall, Baylor University*

*Bobbie Doyle, Baylor University*

*Becky Ivy, Baylor University*

*Brett Powell, Baylor University*

In June 2020, Baylor University went live with Oracle Cloud ERP, including HCM, Finance, Procurement, Projects, and Reporting. As the University was launching user training for the new system, the global pandemic sent everyone home to work remotely. Faced with the challenge of preparing faculty, staff and students to function while they were also adapting to a new way of working, a quick pivot to new training plans was essential. University operations have since returned to normal in many ways, but some previously on-site jobs are now hybrid or fully remote, requiring a continuation of innovative training plans.

**1 CPE: Management Services**



## **Building Community: Procuring Graduate Student Housing at Below-Market Rents Through a P3**

Grand Ballroom Salon A

*Laura Powell, Jefferies*

*Trey Beasley, Vanderbilt University*

*Margaret Emley, Vanderbilt University*

To provide housing at below-market rents and enhance interdisciplinary community-building among incoming graduate and professional students, Vanderbilt University elected to use a public-private partnership to construct a new 616-bed housing facility near campus with a co-working space and a ground floor grocer. The University's initial project was derailed by the pandemic in early 2020, but by purchasing and using the existing construction documents, the University leveraged this experience in an entirely new procurement that reached financial close in April 2021. Proposals received from developers included 501(c)3 structures financed with tax-exempt debt, taxable private placements, and taxable debt/equity transactions. In selecting a structure and development team, the University prioritized certainty of execution, an upfront payment to recover expenses, minimizing any credit impact to Vanderbilt, and strategic alignment to deliver and maintain below-market rental rates targeted at first-year students from a variety of disciplines. The resulting 65-year ground lease includes periodic University buyout options to protect the University in the event of future project underperformance, as well as a tenant waterfall that allows leasing to the general public if certain occupancy targets are not met. The Project financing structure will comprise 70% debt/30% equity with approximately 6 million of initial construction financing from a bank consortium.

**1 CPE: Specialized Knowledge**

## **Planning and Budgeting Post Pandemic-- What Has Changed (And What Has Not)**

Grand Ballroom Salons B-C

*Chris Cowen, University of Florida*

*Lisa McClinton, Elizabeth City State*

*Sharon Bell, Appalachian State*

Workforce, space, operating and capital trends have accelerated during the pandemic, requiring business officers to adapt to a changing and competitive environment. What should change and what should not, and how do we know the difference. Perspectives from small and large universities will be provided to show we have more in common than we think.

**1 CPE: Specialized Knowledge**

**4:00 - 4:50 pm**

**Concurrent Sessions**

**Back to the Basics on Fraud & Ethics (Repeat)**

Grand Ballroom Salon D

*Kevin Robinson, Auburn University*

This session will go back to the basics of fraud and ethics related issues facing higher education. We will look at specific cases that have recently occurred in higher education and what we can learn from them. Finally, we will discuss how fraud and ethics issues may have changed in the pandemic and ways you can work toward proactive prevention.

**1 CPE: Behavioral Ethics**

**Best Practices: Serving and Supporting Employees through a Pandemic**

Conference Rooms 3-4

*Kathryn Funk Baxter, Texas A&M University - San Antonio*

*Martha Gonzalez, Texas A&M University - San Antonio*

Serving and supporting our employees has always been a priority on our campus. Due to the sudden onset of the pandemic we had to revise our delivery methods and practices to meet the new and additional needs our employees were facing. The delivery of the resources had to be reconfigured for the pandemic lock down period, and again for the transition back to the workplace. Due to the quick change to remote teaching and work, our priorities were reestablished, and we needed to identify funding to purchase resources needed to support faculty and staff. Our leadership group had a deliberate emphasis on mental health, and we promoted available resources through our employee assistance program and a dedicated site for our management personnel that included articles and resources for managing a remote workforce. As faculty and staff transitioned back on site a new program called Collaborative Approach to Reconnecting Everyone Safely (CARES) was initiated and included programming on empathetic leadership, reengagement, stress management and work/life balance. The campus also adopted a Wellness Release Time program which offered employees time off during the workweek for physical or mental release time. The increased awareness of empathetic leadership and collaboration also led to the creation of a diversity and inclusion certification program for our employees which will launch in fall 2022. As we pass the two-year mark living in a pandemic, we continue to reassess the needs of our employees so we can advance our programming and responsiveness to their needs.

**1 CPE: Management Services**

## **Creating Equity and Supporting Student Success through Business Operations**

Grand Ballroom Salon A

*Veronica Salazar, The University of Texas at San Antonio*

*Mary Hernandez, The University of Texas at San Antonio*

*Sheri Hardison, The University of Texas at San Antonio*

Making connections between business operations and key university priorities including equity and student success initiatives can be challenging. In this session, attendees will be asked to reflect on this challenge and will share their reflections with one another. After identifying the challenges, presenters during this session will provide a clear path to view the connections between equity and student success initiatives and the critical support services provided in business operations. This will be accomplished through providing real world examples and case studies. Specific examples will include compensation strategy as an avenue for equity, diversifying faculty hiring, pandemic management and HEERF funded projects, and creating infrastructure that supports student success for underrepresented students. After presenting this information, presenters will engage in a discussion about the meaningful impact the business office contributes to equity and student success initiatives. This eye-opening presentation provides a valuable framework through which to view the work of business operations team members and is essential information for all professionals working in the field. Throughout the session presenters will examine how business practices continue to evolve to serve future generations of students and ensure access, affordability, and success – especially in the unique context of diversity and equity and COVID-19 challenges.

**1 CPE: Specialized Knowledge**

## **P3 and Asset Monetization**

Grand Ballrooms Salons B-C

*Linda Campos, University of Idaho*

*Randy Campbell, Wells Fargo Securities*

*Allyson Easterwood, The University of Southern Mississippi*

We will discuss the time required for P3 and asset monetization, items to consider, and opportunities presented by the process. Linda offers a unique perspective given her involvement in the transaction from inception to close.

**1 CPE: Finance**

**4:00 - 4:50 pm**

**Concurrent Sessions (continued)**

**VCU's Journey to Re-imagine Research Space Utilization Metrics**

Conference Rooms 1-2

*Keith Hayes, Virginia Commonwealth University*

VCU has embarked upon a Research Strategic Priorities Plan. The plan seeks to enrich the human experience and advance human health and well-being through exceptionally creative, collaborative and community-engaged research. A group of key leaders across both campuses (Monroe Park and Medical College of Virginia) created a bold, ambitious and strategic university wide plan to serve as a framework to streamline investments leading to increased funding and growth, ultimately advancing excellence in research at VCU.

The aforementioned vision and mission requires a clear understanding of the current spatial research enterprise, current utilization, the data and funding metrics associated with the research space, coupled with evidence-based metrics to make critical research space decisions for new opportunities and growth. As a directive from the Research Deans Committee, departments across the University are required to revisit their research space portfolio and leverage underutilized space. The preliminary results have unearthed a silo-based research metric in which each school use different cost/sf metrics to determine efficiency and utilization.

The Office of Space Management (OSM) captures all University space data inventory, building information, and campus maps. This includes mission critical research space data related to the types of research, location of Principal Investigators, and grant information. The challenge includes a need to address the various departmental research space metrics, establishing a consensus of equity regarding space evaluation, and ultimately establishing a uniform research space policy to meet the goals of the Research Strategic Priorities Plan.

**1 CPE: Specialized Knowledge**

**4:50 - 5:50 pm**

**Happy Hour in the Exhibit Hall**

Grand Ballroom Salons G-M

This networking event includes a variety of appetizer options and an open bar. Visit with each exhibitor and learn more about products and services that may help your institution. Please take a moment to thank the exhibitors for their participation and support of the SACUBO 2022 Annual Meeting.

**Sponsored by:**



**8:30 - 10:30 pm**

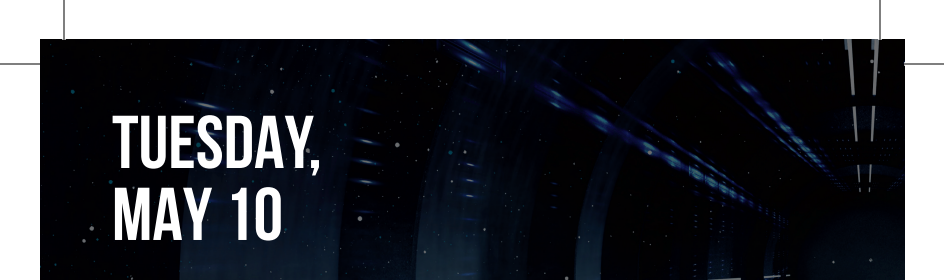
**Tequila Nightcap Cantina**

Conference Rooms 20-21 and Terrace

Wind down your Monday evening at the Tequila Nightcap Cantina, sponsored by Aramark. From 8:30pm to 10:30pm, enjoy a relaxing end to your busy day with specialty tequila cocktails, beer, wine, and light San Antonio-style snacks.

**Sponsored by:**





# TUESDAY, MAY 10

**7:30 am - 3:00 pm**

**Registration and Information Open**

Registration Desk Grand Ballroom Lobby

**7:30 - 8:30 am**

**Breakfast in the Exhibit Hall**

Grand Ballroom Salons G-M

**8:30 - 9:00 am**

**Opening Remarks and Distinguished Service Award**

Grand Ballroom Salons E-F

**9:00 - 10:00 am**

**General Session - Ginny Clarke**

Grand Ballroom Salons E-F

Dedicated to helping leaders create the conscious workplace for tomorrow, Ginny Clarke has advised at the highest levels of corporate America for decades. A proven expert in driving diverse leadership, she is the former director of executive recruiting at Google, where she led the company's diversity, non-tech recruiting, and leadership internal mobility teams – finding and hiring senior leaders across the company. She also built a scaled internal mobility program for Google's senior leaders to advance within the organization and designed much of the infrastructure that supports their executive recruiting function today.

Clarke draws on her unparalleled experience inside corporate C-Suites and boardrooms helping thousands of executives up their game and elevate their careers to bring a unique, holistic five-dimensional approach to true leadership that is essential now more than ever. A systems thinker who deconstructs processes and behaviors to carefully assess organizational and individual capability, she inspires and uplifts groups by helping them scale mobility opportunities for all, bring conscious awareness to both the workplace and life, and navigate the future of work. Clarke delivers “no-holds-barred” discussions on the root causes that lead to a lack of diversity in organizations, and provides the thoughtful, integrated solutions that anyone can use to affect change as we transition into a new era in the workplace.

Prior to Google, Clarke was a partner at Spencer Stuart, the global executive search firm based in Chicago. For 12 years, she worked in the firm's financial services and financial officer practices, and she co-founded and led their global diversity practice. Drawing upon her breadth and depth of experience, Clarke wrote the book titled *Career Mapping: Charting Your Course in the New World of Work*, providing a framework that empowers individuals to plot and assess their professional competencies and strategically navigate their careers.

She is now the CEO of Ginny Clarke, LLC, her own talent and leadership consulting business, as well as the host of *Fifth Dimensional Leadership*, a podcast for leaders, thinkers, and future-makers covering topics like power, personal branding, self-awareness, networking, fear, and career management.

**TUESDAY,  
MAY 10**

Clarke earned her BA in French and Linguistics from the University of California at Davis and her MBA from Northwestern University's Kellogg School. She is the single mother of an adult son, Julian, who works in the entertainment industry.

**1 CPE: Personal Development**

**Sponsored By**



**10:10 - 11:00 am  
Concurrent Sessions**

**Creating a Culture of Accountability From New Hires to Deans, Chairs, and College Leaders**

Grand Ballrooms Salons B-C

*Gwynn Cadwallader, University of Florida*

*Emily Moran, University of Florida*

This session will cover the best practices for creating a culture of fiscal accountability at your institution. We will share how and why the University of Florida designed two impactful training series, Fiscal Onboarding for New Fiscal Staff and Fiscal Responsibility for Leaders (Dean, Directors, Chair and VPs).

**1 CPE: Specialized Knowledge**

**Data Analytics: Where Do We Go Next?**

Conference Rooms 1-2

*Jimmy Barnes, Clemson University*

*Russ Hannah, Arkansas State University*

Leveraging the topics discussed in the previous session we will discuss how an institution could begin and/or improve the analytic journey. This would include an understanding of how to identify areas to analyze, how to collaborate across departmental units, analytic processes, or tools to use and how to report findings.

**1 CPE: Finance**

10:10 - 11:00 am

**Concurrent Sessions (continued)**

**Enabling First Generation Student Success as a Key Driver of Retention**

Grand Ballroom Salon D

*Tracy Baker, Sodexo*

*Heather Bacque, Sodexo*

*Kamesha Hill, Jackson State University*

*Kelvin Davis, Delta State University*

Generation Z's perspective on campus life and life in general has evolved over the past year, challenging us all to keep pace with student expectations while delivering value. Enabling the success of first-generation students is a critical piece of the engagement puzzle that requires a nuanced and thoughtful approach. Dining Services, from provisions to providing internship opportunities, is a core foundation in nourishing the needs of the first-generation community on campus. Learn about successful cross-campus collaborations bringing new strategies to life at a roundtable discussion with Delta State University, Jackson State University and Sodexo.

**1 CPE: Specialized Knowledge**

**Improving Cashflow through Academic Operations**

Conference Rooms 3-4

*David Armstrong, BKD*

*Jana Vandertook, Oklahoma Baptist University*

Allowing the annual budget to set the direction of the university is the proverbial tail wagging the dog. The budget is only as successful as the long-term financial model of the institution. To drive change in the institution's financial sustainability, obtaining relevant and actionable data is critical to the process. When university leadership has the right information, they can make data-informed decisions on the operations of their academic model. Utilizing a robust, data-rich solution that provides a visual presentation will help foster consensus and collaboration around the right data.

We will hear how one institution achieved dramatic results and created clarity on their financial future. Gathering the right data from across campus was critical to their success and provided the data for long-term planning and budgeting.

We will explore the processes and examine the methods used to drive data-informed analysis and decisions. Creating an environment of collaboration, data-sharing and forward-looking conversations transformed their leadership's focus. By allowing the school to see the financial impact of academic operations, they were equipped to make adjustments to improve future academic margins. The leadership team was able to use this financial data to help tell the story of their future.

**1 CPE: Specialized Knowledge**



## **Lions, Tigers, and Bears...Moving from Reaction to Resilience through Institution Wide Continuity Planning**

Grand Ballroom Salon A

*Dawn Alston, Spelman College*

*John Wilson, Spelman College*

Whether a pandemic, cyber-attack, or social unrest...risk is risk and risk realized creates disruption. The last three years personify risk realized disruption to every industry world-wide...and higher education has not been immune. Disruption always precipitates both challenge and opportunity. It is an organization's preparedness, risk mitigation/continuity planning and innovative approach that determine how resilient and successful its path forward will be. In this session, Spelman College administrators will share how cross functional areas of the College participated in a board driven strategy to develop a comprehensive business continuity plan, immediately preceding a cyberattack, pandemic and racially motivated security threats. Implementation of the plan will be reviewed, as well as lessons learned. Together we will examine how continuity planning can be utilized as an excellent tool for not only restoration of operations for survivability, but a guide towards developing creative approaches to optimizing the experience of students and maintaining positive relationships with employees and all stakeholders. In this age of technology, deliberate focus will be placed on the parts of the continuity plan regarding cybersecurity, its implementation during recovery from the College's cyber-attack and new risk mitigating strategies developed to be included in the continuity plan.

### **1 CPE: Management Services**

**11:00 - 11:30 am**

#### **Break in the Exhibit Hall**

Grand Ballroom Salons G-M

**11:30 am - 12:20 pm**

#### **Concurrent Sessions**

#### **Best Practices to Reduce Student Debt (Financial Literacy)**

Grand Ballrooms Salons B-C

*Maureen Anderson, Financial Aid Services*

The benefits of a financial literacy program are significant. Research shows it may reduce student loan default, improve retention and graduation rates, build a base of active and engaged students and alumni, as well as build strong community partnerships. But schools struggle with whose responsibility it should be and how it will be funded. Come hear about the best practices for Financial Literacy and Education at institutions of higher education and ideas on how you can implement one at your institution on any budget.

### **1 CPE: Specialized Knowledge**

11:30 am - 12:20 pm

**Concurrent Sessions (continued)**

**Campus Policing Today - What Administrators Need to Know**

Grand Ballroom Salon A

*Kevin Morris, Sam Houston State University*

*Paul Chapa, Trinity University*

*Amanda Withers, Sam Houston State University*

Join us as we discuss hot topics in university policing. We will discuss several topics, including what sets University police apart from our city and county partners, recruitment, and retention, and 21st century policing. This will be presented in a question-and-answer method.

**1 CPE: Specialized Knowledge**

**How to Use Benchmarking Data to Support Financial Sustainability & Inform Budgeting Decisions**

Conference Rooms 3-4

*Adam Tate, University of Alabama*

With an increased focus on financial sustainability and the desire to make informed budget decisions, colleges and universities are looking for data driven solutions. From managing their staffing levels and making hiring decisions to improving recruitment and retention, it's critical to have an understanding of labor spend. Stakeholder buy-in and acceptance of the data is also crucial, and fostering trust and confidence in data across departments and campuses can be challenging.

In this session, the University of Alabama's (UA) Executive Director of Finance, Adam Tate, will share how UA created a culture of data around campus, as well as the ways in which they're using labor spend and benchmarking data to answer strategic questions in critical areas:

- How do our pay rates, specifically within public safety and IT, compare to peers and contribute to our ability to recruit and retain our staff?
- How can we hire more strategically and understand which units are over or understaffed?
- What are our peers doing and how can we use their insights to inform our plans and share best practices?

**1 CPE: Management Services**

**Operational Excellence: Redesigning the Future of Work in Higher Education**

Grand Ballroom Salon D

*Rick Wernoski, UNC Chapel Hill*

*Suzie Baker, UNC Chapel Hill*

*Candace Reynolds, UNC Chapel Hill*

Higher education is one of the many industries affected by what has been dubbed "The Great Resignation," a phenomenon that describes record-breaking levels of people voluntarily leaving their jobs in the wake of the COVID-19 pandemic. The critical need for lasting flexible work arrangements in higher education was illuminated during this time, particularly as the corporate world proved more agile

and prepared to adjust to changing circumstances, offering a tempting destination for university employees seeking remote work. Join this session to learn how Operational Excellence partnered with Human Resources and Finance and Operations to establish a new “future of work” at UNC Chapel Hill. We will discuss our approach to tackling this project, the process and solution that led us to where we are today, and where we go from here.

**1 CPE: Specialized Knowledge**

**Sustainable Diversity and Inclusion - Retaining and Developing Talent**

Conference Rooms 1-2

*James Lock, III, J.P. Morgan*

*Myron Anderson, University of Texas San Antonio*

*Stella Silva, Texas State University*

Retaining and developing talent are critical to creating a sustainable culture of diversity and inclusion in an organization. This panel explores strategies to cultivate talent and keep mid-career professionals engaged. This session will provide a broader perspective on strategies by peers and lessons learned.

**1 CPE: Personnel/Human Resources**

**12:20 - 1:30 pm**

**Lunch and SACUBO Business Meeting**

Grand Ballroom Salons E-F

**1:30 - 2:30 pm**

**Dessert in the Exhibit Hall**

Grand Ballroom Salons G-M

Head on over to the Exhibit Hall for dessert and one last time to visit with our Exhibitors.

**2:30 - 3:20 pm**

**Concurrent Sessions**

**Bending the Cost Curve: Strategies for Financial Sustainability**

Grand Ballroom Salon A

*Bryan Elmore, Auburn University*

*Kelli Shomaker, Auburn University*

*Adrienne Frank, Auburn University*

While higher education is currently experiencing continuing economic uncertainty as the COVID pandemic lingers, it faces potentially an even greater crisis with the projected decrease in the number of high school graduates within the next 3 to 5 years. We discuss critical conversations that occurred in the initial stages of the pandemic that also carry into our long-term planning strategies on how we reduce our spending habits to ensure viability.

**1 CPE: Management Services**

2:30 - 3:20 pm

**Concurrent Sessions (continued)**

**Cutting the Cord – How Microgrids Can Change Your Approach to Power on Campus**

Grand Ballroom Salon D

*Ryan Ball, Schneider Electric*

*Barry Wilhelm, Schneider Electric*

*Debra Jones, Schneider Electric*

Have you cut the cord at home from cable tv to streaming? Have you considered “cutting the cord” on campus? Session will discuss opportunities to generate power to offset costly electricity charges and provide additional energy stability and reliability. Micro Grids will be explained, as well as opportunities to utilize federal funding to manage expenses.

**1 CPE: Specialized Knowledge**

**Endowment Policies and Practice**

Conference Rooms 3-4

*Augie Maurelli, UVA Finance*

This session:

- Provides insight into the endowment structure and associated policies at UVA.
- Describes how UVA aligns endowment policies and investment management decisions to support various institutional needs associated with the strategic plan.
- Outlines a holistic and sustainable approach to stewarding the fiscal resources of the enterprise.

**1 CPE: Finance**

**How to Finance Equitable Student Outcomes (Budgeting with a DEI lens)**

Conference Rooms 1-2

*Jim Hundrieser, NACUBO*

*Jose Carlos Hernandez, Sam Houston State University*

As more institutions continue to prioritize access, retention, and completion, NACUBO has engaged in a three-year grant project to identify how institutions can strategically finance equitable student outcomes.

This session will explore ways to reconsider your planning and budgeting process with a DEI lens, as well as how to build-in strategies that prioritize equitable solutions. We will share measurements to analyze the ROI linked to equity-based activities to ensure they are sustained and measured. We will also offer frameworks and tools to guide new ways to plan, budget, and finance equitable practices and programs.

**1 CPE: Finance**

**Name Image and Likeness (NIL) Overview**

Grand Ballrooms Salons B-C

*Brad Barnes, Texas A&M University Athletics Compliance*

This session will discuss basic concepts of NIL. It will also cover the NCAA's NIL interim policy and Texas' NIL law. It will also cover how a Texas-based NCAA member institution may vs may not assist student-athletes in the NIL field, recruiting issues, and other assorted issues.

**1 CPE: Specialized Knowledge****3:30 - 4:20 pm****Concurrent Sessions****Agile Planning Life Cycle: Net Tuition and Beyond**

Grand Ballroom Salon A

*Noel Sloan, Texas Tech University**Alexia Pereira, Synario*

Scenario analysis can be a powerful analytical tool for any business officer. It is commonly used in decision-making to provide a structured way of thinking about potential scenarios by proactively identifying problems, allowing users to plan appropriately. This presentation will highlight the value of developing a strategic plan for net tuition revenue. Texas Tech University has implemented a disciplined multi-year financial planning approach to simplify complex strategic decisions as it pertains to their largest revenue source. This presentation will also review best practices and lessons learned will be shared from years of experience developing and communicating financial models using various platforms and tools.

**1 CPE: Finance****Communicating Ethical Standards and Upgrading Fraud Detection Processes in Modern Times**

Grand Ballrooms Salons B-C

*Benjamin Harmon, Austin Peay State University**Doug Hindsley, Card Integrity*

With the changing landscapes in higher education and organizations moving to hybrid work arrangements, we must not lose sight of the powerful purchasing card. While the card is an amazing tool for convenience and expedited purchasing needs, unchecked, it can have devastating consequences. Developing a process that not only reviews all card transactions, but also educates users that all card transactions are reviewed, will help our institutions stay out of the nightly leading news story (except on those occasions where we want to be headline news for our educational breakthroughs or national championships).

**1 CPE: Regulatory Ethics**

**3:30 - 4:20 pm**

**Concurrent Sessions (continued)**

**Executive Searches - How Are They Managed at Your Institution? (A Roundtable Discussion)**

Conference Rooms 3-4

*Rick Wernoski, UNC Chapel Hill*

*Rhonda Beassie, Sam Houston State University*

*William Nelson, Virginia Commonwealth University*

Join staff from UNC Chapel Hill, Virginia Commonwealth University and Sam Houston State University in an interactive roundtable as we discuss how executive searches are managed from search & selection through offer & hire. The team will facilitate a discussion with audience participation to share best practices. The executive search process is often the candidate's first impression of the University and impacts their reputation, thus an executive search process must be world class to attract top talent and set these leaders up for success. How do you do it at you institution?

**1 CPE: Personnel/Human Resources**

**The CFO/CBO's Guide to Prospering in a Sustainable World**

Conference Rooms 1-2

*John George, Nuveen*

*Susan Maddux, Furman University*

*Craig Parkin, TIAA*

From a public health crisis to an economic recession to demands for social justice, the pandemic shined a spotlight on all facets of sustainability. What does a CFO/CBO need to understand about today's environmental and social issues and how they can support or derail an institution's mission? How are campus leaders building holistic sustainable communities? How can colleges and universities align their institutional and retirement plan assets to sustainability objectives—while potentially boosting returns on investment? These are some of the questions we will explore in this session, with a focus on sustainability education, research, and leadership at Furman University.

**1 CPE: Specialized Knowledge**

**The Shared Services Center Journey**

Grand Ballroom Salon D

*Dennis Moynihan, Virginia Community College System*

Distributed organizations often have duplicated "back office" administrative functions such as accounts payables, procurement, or HR services. Consolidating these functions in a "Shared Services Center" offers the promise of improved efficiency and effectiveness. The Virginia Community College System has been building such an "SSC" from the ground up over the last several years. This session will present the opportunities, challenges, and lessons learned from our "Shared Services" journey.

**1 CPE: Management Services**

**4:20 - 5:20 pm**

**Closing Reception**

Conference Rooms 20-21 and Terrace

Join your colleagues and new friends to share what you have learned over the last three days. Make sure you exchange contact information to keep your network going.

**Sponsored By**



## STAY IN TOUCH

We encourage SACUBO members to stay in touch via our monthly newsletters and our LinkedIn page. Both resources provide more information about our conferences and volunteer opportunities. If you would like to receive the newsletter via email, contact [info@sacubo.org](mailto:info@sacubo.org).

**To join the SACUBO page on LinkedIn, scan the QR code below.**



**FOLLOW SACUBO**

Monday, May 9					
	Grand Ballroom Salon A	Grand Ballroom Salons B-C	Grand Ballroom Salon D	Conference Rooms 1-2	Conference Rooms 3-4
10:10-11:00 AM	<p><b>Wait, Where are They? Managing Compliance for Internationally Located Students and Faculty</b> Patty Milner, University of Arkansas Cleston Murray, University of Arkansas</p> <p><b>Round Table - Research</b> Kelly Epting, University of South Carolina Gene Crouch, George Mason University</p>	<p><b>Washington Update from NACUBO</b> Liz Clark, NACUBO</p>	<p><b>Navigating Presidential Transitions</b> Nick Wallace, BKD CPAs and Advisors Tim Judd, Campbellsville University</p> <p><b>Round Table - Small Institutions</b> Chris Gardner, Wofford College</p>	<p><b>More than Debt: How CFO's Can Engage their Financial Advisors as Strategic Partners</b> Joshua Lassiter, First Tryon Advisors Rob Kettner, First Tryon Advisors Bob Shea, UNC - Greensboro Paul Forte, UNC - Greensboro</p> <p><b>Round Table - Comprehensive Doctoral</b> Valarie Van Vaack, Texas State University</p>	<p><b>Best Practices - Transforming Compliance Training</b> Jennifer Clark, University of Alabama Marcy Huey, University of Alabama</p> <p><b>Round Table - Community Colleges</b> Randall Ellis, Virginia Community College System</p>
11:30 AM-12:20 PM					
3:00-3:50 PM	<p><b>Building Community: Procuring Graduate Student Housing at Below-Market Rents through a P3</b> Laura Powell, Jefferies Trey Beasley, Vanderbilt University Margaret Emley, Vanderbilt University</p>	<p><b>Planning and Budgeting Post Pandemic-- What Has Changed (And What Has Not)</b> Chris Cowen, University of Florida Lisa McClinton, Elizabeth City State Sharon Bell, Appalachian State</p>	<p><b>Back to the Basics on Fraud &amp; Ethics</b> Kevin Robinson, Auburn University</p>	<p><b>Best Practices - Training Adaptations: Adjusting to a Changing Environment</b> Patoya Hall, Baylor University Bobbie Doyle, Baylor University Becky Ivy, Baylor University Brett Powell, Baylor University</p>	<p><b>Best Practices - The Pioneer Way - Bringing Dining Services In-House</b> Trey Arrington, Spartanburg Methodist College</p>
4:00-4:50 PM	<p><b>Creating Equity and Supporting Student Success through Business Operations</b> Veronica Salazar, The University of Texas at San Antonio Mary Hernandez, The University of Texas at San Antonio Sheri Hardison, The University of Texas at San Antonio</p>	<p><b>P3 and Asset Monetization</b> Linda Campos, University of Idaho Randy Campbell, Wells Fargo Securities Allyson Easterwood, The University of Southern Mississippi</p>	<p><b>(Repeat) Back to the Basics on Fraud &amp; Ethics</b> Kevin Robinson, Auburn University</p>	<p><b>VCU's Journey to Re-imagine Research Space Utilization Metrics</b> Keith Hayes, Virginia Commonwealth University</p>	<p><b>Best Practices - Serving and Supporting Employees through a Pandemic</b> Kathryn Funk Baxter, Texas A&amp;M University - San Antonio Martha Gonzalez, Texas A&amp;M University - San Antonio</p>



Tuesday, May 10

	Grand Ballroom Salon A	Grand Ballroom Salons B-C	Grand Ballroom Salon D	Conference Rooms 1-2	Conference Rooms 3-4
10:10-11:00 AM	<p><b>Lions, Tigers and Bears...Moving from Reaction to Resilience through Institution Wide Continuity Planning</b> Dawn Alston, Spelman College John Wilson, Spelman College</p>	<p><b>Creating a Culture of Accountability From new Hires to Deans, Chairs and College Leaders</b> Gwynn Cadwallader, University of Florida Emily Moran, University of Florida</p>	<p><b>Enabling First Generation Student Success as a Key Driver of Retention</b> Tracy Baker, Sodexo Heather Bacque, Sodexo Kamesha Hill, Jackson State University Kelvin Davis, Delta State University</p>	<p><b>Data Analytics: Where do we go Next?</b> Jimmy Barnes, Clemson University Russ Hannah, Arkansas State University</p>	<p><b>Improving Cashflow through Academic Operations</b> David Armstrong, BKD Jana Vanderhook, Oklahoma Baptist University</p>
11:30 AM-12:20 PM	<p><b>Campus Policing Today - What Administrators Need to Know</b> Kevin Morris, Sam Houston State University Paul Chapa, Trinity University Amanda Withers, Sam Houston State University</p>	<p><b>Best Practices to Reduce Student Debt (Financial Literacy)</b> Maureen Anderson, Financial Aid Services</p>	<p><b>Operational Excellence: Redesigning the Future of Work in Higher Education</b> Rick Wernoski, UNC Chapel Hill Suzie Baker, UNC Chapel Hill Candace Reynolds, UNC Chapel Hill</p>	<p><b>Sustainable Diversity and Inclusion - Retaining and Developing Talent</b> James Lock, J.P. Morgan Myron Anderson, University of Texas San Antonio Stella Silva, Texas State University</p>	<p><b>How to Use Benchmarking Data to Support Financial Sustainability &amp; Inform Budgeting Decisions</b> Adam Tate, University of Alabama</p>
2:30-3:20 PM	<p><b>Bending the Cost Curve: Strategies for Financial Sustainability</b> Bryan Elmore, Auburn University Kelli Shomaker, Auburn University Adrienne Frank, Auburn University</p>	<p><b>Name Image and Likeness (NIL) Overview</b> Brad Barnes, Texas A&amp;M University</p>	<p><b>Cutting the Cord - How Microgrids Can Change Your Approach to Power on Campus</b> Ryan Ball, Schneider Electric Barry Wilhelm, Schneider Electric Debra Jones, Schneider Electric</p>	<p><b>How to Finance Equitable Student Outcomes (Budgeting with a DEI lens)</b> Jim Hundrieser, NAACUBO Jose Carlos Hernandez, Sam Houston State University</p>	<p><b>Endowment Policies and Practice</b> Auggie Maurelli, University of Virginia</p>
3:30-4:20 PM	<p><b>Agile Planning Life Cycle: Net Tuition and Beyond</b> Noel Sloan, Texas Tech University Alexia Pereira, Synario</p>	<p><b>Communicating Ethical Standards and Upgrading Fraud Detection Processes in Modern Times</b> Benjamin Harmon, Austin Peay State University Doug Hindsley, Card Integrity</p>	<p><b>The Shared Services Center Journey</b> Dennis Moynihan, Virginia Community College System</p>	<p><b>The CFO/CBO's Guide to Prospering in a Sustainable World</b> John George, Nuveen Susan Maddux, Furman University Craig Parkin, TIAA</p>	<p><b>Executive Searches - How are They Managed at Your Institution? (Roundtable Discussion)</b> Rick Wernoski, UNC Chapel Hill Rhonda Beasie, Sam Houston State University William Nelson, Virginia Commonwealth University</p>

# 2022 – 23

## UPCOMING EVENTS

### COLLEGE BUSINESS MANAGEMENT INSTITUTE (CBMI)

University of Kentucky, Lexington, KY

July 24 – 28, 2022

Registration Open & Scholarship

Applications Available

Visit the [sacubo.org](http://sacubo.org) for more information

### FALL WORKSHOP 2022

Marriott Savannah Riverfront, Savannah, GA

November 9 - 11, 2022

Registration opens in June

### WOMEN'S LEADERSHIP FORUM 2023

March 2023

Information available this fall

### ANNUAL MEETING 2023

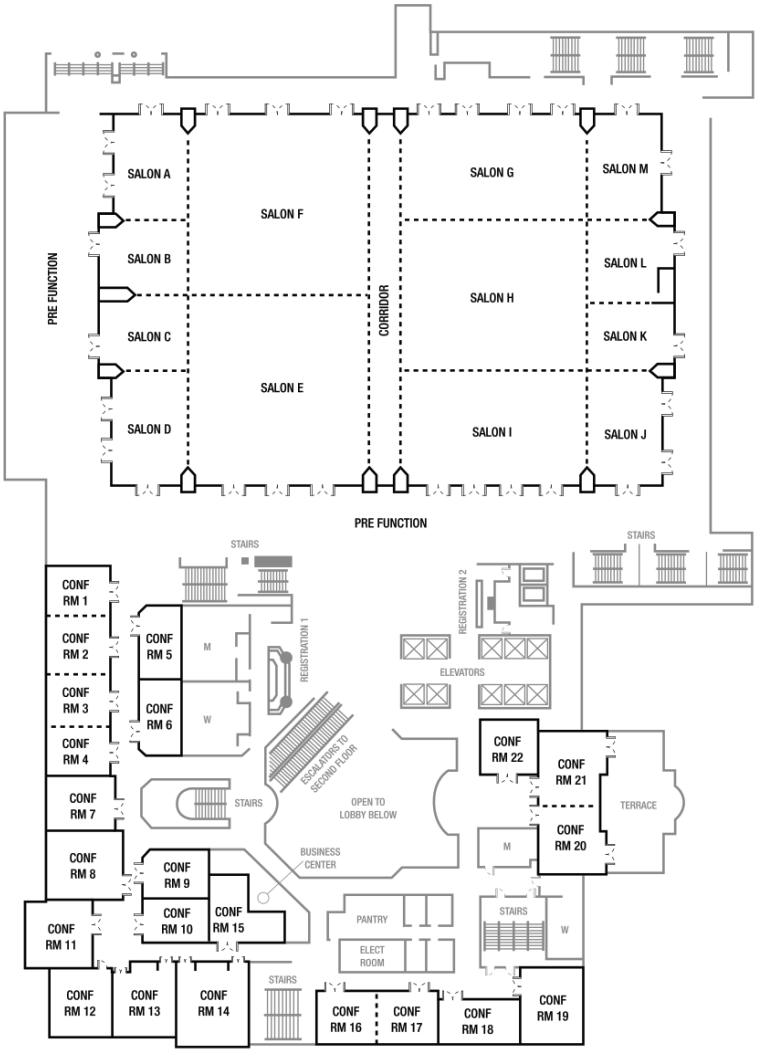
Atlanta Marriott Marquis, Atlanta, GA

April 30 – May 2, 2023

Registration opens December 2022

# HOTEL FLOOR PLAN

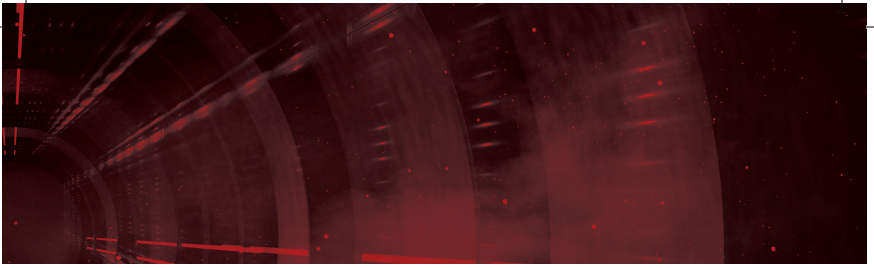
## THIRD FLOOR MEETING SPACE



# EXHIBITOR LISTING

## WITH BOOTH NUMBERS

Company Name	Booth
ABM Industries, Inc.	303
ACI Worldwide	307
Akademos	424
Aladdin, an Elior Company	115
Allitix	323
Apogee	110
Aramark	200
Atlanta Consulting Group	406
BankMobile Disbursements	402
Barnes & Noble College	109
B&H B2B	302
BKD, LLP	310
Brown Edwards	410
CapinCrouse, LLP	216
Card Integrity	206
Centrica Business Solutions	104
Chartwells Higher Education Dining Services	320
Cherry Bekaert LLP	418
Coalition for College Cost Savings	218
Columbia Advisory Group	408
DebtBook	107
Duke Energy Sustainable Solutions	305
ECSI	116
Edamerica	317
Farmers National	321
Financial Aid Services	219
First American Education Finance	414
Follett Higher Education Group	311
FranklinCovey Education	205
GradGuard	204
Great Western Dining	102
HCA Asset Management	416
HelioCampus	203
HES Facilities Management	100
HighGround Advisors	111
Hoar Program Management (HPM)	221
Howard Technology Solutions	404
inLogic	300
J.P. Morgan	319
MARCIS & ASSOCIATES INC	318
National Management Resources Corp	207
Nelnet Campus Commerce	322



<b>Company Name</b>	<b>Booth</b>
<b>OneStream Software</b>	<b>308</b>
<b>Raymond James</b>	<b>309</b>
<b>Records Consultants, Inc.</b>	<b>209</b>
<b>Regions Bank</b>	<b>202</b>
<b>SAP Concur</b>	<b>211</b>
<b>Schneider Electric</b>	<b>103</b>
<b>Segal</b>	<b>225</b>
<b>Sightlines</b>	<b>210</b>
<b>Sodexo Campus</b>	<b>106</b>
<b>Spaulding Ridge</b>	<b>117</b>
<b>SSC Services for Education</b>	<b>325</b>
<b>Synario</b>	<b>214</b>
<b>Syntellis Performance Solutions</b>	<b>304</b>
<b>TCP Software</b>	<b>108</b>
<b>TDIndustries, Inc.</b>	<b>306</b>
<b>TIAA</b>	<b>201</b>
<b>TouchNet</b>	<b>315</b>
<b>Transact</b>	<b>105</b>
<b>TruEd Consulting</b>	<b>208</b>
<b>Truist Bank</b>	<b>324</b>
<b>Ultimate Kronos Group</b>	<b>101</b>
<b>Weaver</b>	<b>223</b>
<b>Workday</b>	<b>420</b>

## **EXHIBIT HALL HOURS**

### **Monday, May 9**

- 7:30 – 8:30 AM Breakfast in the Exhibit Hall
- 11:00 – 11:30 AM Break in the Exhibit Hall
- 1:30 – 3:00 PM Ice Cream Social in the Exhibit Hall
- 4:50 – 5:50 PM Happy Hour in the Exhibit Hall

### **Tuesday, May 10**

- 7:30 – 8:30 AM Breakfast in the Exhibit Hall
- 11:00 – 11:30 AM Break in the Exhibit Hall
- 1:30 - 2:30 PM Dessert in the Exhibit Hall



# SACUBO

SOUTHERN ASSOCIATION OF COLLEGE  
AND UNIVERSITY BUSINESS OFFICERS

## 2023 ANNUAL MEETING

APRIL 30 - MAY 2, 2023  
ATLANTA MARRIOTT MARQUIS,  
ATLANTA GA



REGISTRATION OPENS  
IN DECEMBER