ANNUAL MEETING 2021
All Virtual | September 27-29
NAVIGATING UNCHARTED TERRITORIES IN HIGHER EDUCATION.
Dear Colleagues,

On behalf of the entire CACUBO Board and annual meeting committee, welcome to the 2021 Annual Meeting.

What a year it has been! We’ve all worked hard to make our campuses safe, our finances stable, and our lives manageable. It’s been the biggest challenge most of us will face in our careers. But thanks to your skills and resilience, your institutions have survived and are poised to return to normal. Congratulations to all of you!

They say timing is everything, and this year’s annual meeting is a perfect example of that adage. We had hoped to be welcoming all of you to Omaha in person, but alas, prudence in the face of circumstances forced us to pivot to a virtual event. Undeterred, your fellow CACUBO committee members have worked incredibly hard to make it possible - on top of the demands of personal lives and “day jobs”, no less. I stand in awe and gratitude of all they have done.

And so, my friends, I hope you find our first virtual annual meeting to be valuable and enjoyable. Thank you for joining us!

Mike Volna
2021 CACUBO President
CACUBO BOARD OF DIRECTORS

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Associate VP Finance & Controller, University of Minn.

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Associate Controller
Bowling Green State University

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VP Finance
National Louis University

At Large Member:
Susan Palmer
VP for Finance & Administration
College of Saint Benedict

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VP Finance
National Louis University

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Susan Palmer
VP for Finance & Administration
College of Saint Benedict

At Large Member:
Shari Mayer
Payroll & Tax Manager
Carleton College

CACUBO BOARD OF DIRECTORS

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Associate Vice Chancellor
IUPUI
Please register for the Annual Meeting online from our website at cacubo.org by clicking on “Annual Meeting”.

**CACUBO MEMBERS | NON-MEMBERS | GUESTS**

$199

CANCELLATION REQUESTS will be processed by MemberClicks on the CACUBO registration website. If you wish to substitute another individual, contact Greg Deppong at deppong@msu.edu, for more information. Annual meeting registration cancellations received on or before Sept. 15 are eligible for a refund less a $100 administrative fee. Registrants canceling after and conference no-shows are liable for the full amount due.

**QUESTIONS ON THE CONFERENCE**

Nancy L. Combs  
Host Committee Chair  
Email: combsn@grinnell.edu  
Phone: 641-269-4245
CPE INFORMATION

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

State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through www.learningmarket.org. The CACUBO sponsor identification number is 116326.

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

FUTURE PROFESSIONAL DEVELOPMENT EVENTS

May 15 - 18, 2022
CACUBO Accounting and Business Operations Workshop (CABOW)
Hyatt Regency
Louisville, KY

August 7 - 9, 2022
CACUBO Leadership Institute
Crossroads Hotel
Kansas City, MO

September 25 - 27, 2022
CACUBO Annual Meeting
Marriott
St. Louis, MO

May 7 - 10, 2023
CACUBO Accounting and Business Operations Workshop (CABOW)
Hyatt Regency
Louisville, KY

August 6 – 8, 2023
CACUBO Leadership Institute
Hyatt Regency
Milwaukee, WI

Oct 1 – 3, 2023
CACUBO Annual Meeting
Hilton
Omaha, NE
GENERAL SESSION SPEAKER

Katty Kay
Lead Anchor, BBC World News America
Co-Author, Womenomics,
The Confidence Code and The Confidence Code For Girls

Washington-based Katty Kay is lead anchor for BBC World News America, covering the full gamut of American and global affairs, reporting on US elections, the White House, Congress, Wall Street, global economies and world trouble spots. Outside of the U.S., Kay is seen globally on the BBC World News channel where her broadcasts bring international audiences a unique perspective on U.S. news and political events. Kay’s broadcasts are meant to appeal to an audience with a serious interest in what is happening in every aspect of our immensely complicated world, offering a candid look at America through an international prism.

The daughter of a British diplomat, Kay grew up all over the Middle East and served as a correspondent in Japan before becoming Washington correspondent for the BBC in 2002.

Kay’s global perspective is instinctive and helps audiences cut through complex issues and see them in valuable context. She is a frequent guest commentator on NBC’s Meet the Press, The Chris Matthews Show, MSNBC’s Morning Joe and others. Kay’s style and wit coupled with her political and global savvy make her an exceptional speaker, panel moderator, and interviewer.

Kay is co-author (with Claire Shipman) of two New York Times bestsellers. The Confidence Code: The Science and Art of Self-Assurance--What Women Should Know, inspires women to understand that confidence – the lynchpin of success – is a choice. Her most recent book, The Confidence Code for Girls explores the origins and effects of confidence and explores key concepts on how to strive for and achieve confidence. Kay’s first book, Womenomics: Write Your Own Rules for Success examines the workplace revolution and inspires women to take control, dream big and discover a different way of weaving work into their lives.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Personal Development
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
GENERAL SESSION SPEAKER

Phil Gwoke
Consultant
Bridgeworks

Getting to Know Gen Z

We’ve all seen the headlines... “Move over Millennials, here comes Gen Z!” Gen Z is the topic du jour, and for good reason. They make up the majority of interns and recent college grads in today’s workplace, and they will continue to for the next decade. They aren’t just a group of phone-obsessed teenagers - they’re also our digital-native employees. Seventy-four percent of Gen Zers know they struggle with in-person communication, and 54% want a leader who encourages them more than anything.

There are very real generational differences that will directly impact your workplace, and we want to help you work through them.

In this session, we cover who this young generation is and, more importantly, why they approach work differently from their generational predecessors. And we’ll show that neither Millennials, Xers, nor Boomers need move over for Gen Z, because there’s strength in a cohesive, multi generational team.

Around BridgeWorks HQ, Phil is known as the motivator and the historian. As an internationally recognized speaker, Phil has shared his wisdom and inspired audiences in 40 different states and 4 continents to over 100,000 people. Before becoming a speaker he pursued his passion to help people be their best selves as a high school teacher, college admissions professional, marketing coordinator, corporate trainer and even small business owner. He has maintained strong ties to his local community as a mentor and consultant to young entrepreneurs, and brings his diverse background and skill-set to the BridgeWorks team.

Phil is one of BridgeWorks’ resident Gen Xers, and brings his unique humor, experiences, research, and generational expertise to every keynote, workshop and training session he delivers. He is a firm believer that with the proper motivation, training, and support system, members of any generation can become capable of remarkable accomplishments. With his down-to-earth, relatable style and dedication to presenting research in a digestible, entertaining way, Phil has become a fast favorite with audiences around the country.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Personal Development
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
Justin Jones-Fosu, MBA
President/ CEO
Justin Inspire International LLC.

Justin Jones-Fosu is a full-time husband and daddy who also happens to be an international speaker, an award winning entrepreneur, and author. He is the President/Chief Inspirational Officer of Justin Inspires International, LLC where he speaks 50-60 times a year for professionals, corporations, and organizations. His speaking has led him to speak for over 250+ organizations in 4 countries. He has presented in 45 of the 50 states and is working hard to present in all 50 (can you guess which states he hasn’t spoken in?)!

Justin is also the founder of Respectivity, a company helping workplaces to develop better cultures of respect to increase employee engagement, peak performance, and customer service to improve their triple bottom line.

He is the author of two books, the most recent being “Finding Your Glasses: Revealing and Achieving Authentic Success,” which challenges the reader to live a life of success based on their core values. Justin is a former HR Professional who obtained his MBA specializing in Leadership and Organizational Change and undertook further graduate studies in the area of Human Resource Development.

He has also gained valuable leadership experience with three Fortune 500 companies as well as by consulting with individuals and small business on strategy, leadership, diversity and organizational development. In 2008, Justin was named as one of EBONY Magazines “30 Young Leaders on the Rise” and has been featured in SMART CEO Magazine, the Baltimore Business Journal and other publications.

He is a Professional Member of the National Speakers Association and a member of SHRM (Society for Human Resource Management). Being a former weekly radio host, Justin continues his passion for current events and how they can positively shape our lives.

If you only remember a few things about Justin, it’s that he is madly in love with his wife and loves being a daddy. He believes that these are more important than any accomplishments, recognition, or accolades!

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Personal Development
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
Liz Clark
VP Policy and Research
NACUBO

NACUBO Advocacy on the Hill

Liz Clark is Vice President for Policy and Research for the National Association of College and University Business Officers (NACUBO). Liz has been working to advance the goals and priorities of colleges and universities on Capitol Hill since 1999. She joined NACUBO after spending more than three and a half years leading the State University of New York (SUNY) System Office of Federal Relations in Washington, DC. Liz also served as Director of Federal Relations for Oregon State University and prior to that, she was Assistant Director of Federal Relations at Cornell University, where she was charged with overseeing Cornell University’s first Washington, DC-based federal relations office. In the session today, Liz will discuss current policy discussion occurring in Washington DC and how that may affect higher education.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Specialized Knowledge
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours

An Interview with Moody’s Regarding Their Higher Education Outlook

In this hour long session, Mike Volna (our current CACUBO president) will interview Michael Osborne (Moody’s Investors Service Vice President). The discussion will provide information about the trends and patterns that Moody’s is seeing in higher education and how the higher education market has changed in the last year. The conversation will also focus on the areas that Moody’s prioritizes and considers as they review the ratings of higher education institutions and how such has evolved through and after the pandemic.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Specialized Knowledge
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
## 2021 CACUBO ANNUAL MEETING
### DAILY SCHEDULE

### MONDAY, SEPT. 27

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:50 - 9:00 a.m.</td>
<td>Welcome by Mike Volna, President of CACUBO</td>
</tr>
<tr>
<td>9:00 - 10:00 a.m.</td>
<td>General Session</td>
</tr>
<tr>
<td></td>
<td>Phil Gwoke - Getting to Know Gen Z</td>
</tr>
<tr>
<td>10:15 - 11:15 a.m.</td>
<td>Concurrent Sessions #1</td>
</tr>
<tr>
<td>11:30 a.m. - 12:30 p.m.</td>
<td>Concurrent Sessions #2</td>
</tr>
<tr>
<td>12:30 - 1:30 p.m.</td>
<td>Break</td>
</tr>
<tr>
<td>1:30 - 2:30 p.m.</td>
<td>Concurrent Sessions #3</td>
</tr>
<tr>
<td>2:45 - 3:45 p.m.</td>
<td>Concurrent Sessions #4</td>
</tr>
<tr>
<td></td>
<td>and Sikich LLP Showcase</td>
</tr>
<tr>
<td>3:50 - 4:00 p.m.</td>
<td>Wrap-up</td>
</tr>
</tbody>
</table>

### TUESDAY, SEPT. 28

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 - 9:15 a.m.</td>
<td>Remarks by Mike Volna</td>
</tr>
<tr>
<td>9:15 - 10:15 a.m.</td>
<td>Liz Clark, VP Policy and Research, NACUBO</td>
</tr>
<tr>
<td>10:30 - 11:30 a.m.</td>
<td>Concurrent Sessions #5</td>
</tr>
<tr>
<td></td>
<td>and HelioCampus Showcase</td>
</tr>
<tr>
<td>11:30 a.m. - 12:30 p.m.</td>
<td>Lunch Break</td>
</tr>
<tr>
<td>12:30 - 1:30 p.m.</td>
<td>Concurrent Sessions #6</td>
</tr>
<tr>
<td>1:45 - 2:45 p.m.</td>
<td>General Session</td>
</tr>
<tr>
<td></td>
<td>Katty Kay - Political Update</td>
</tr>
<tr>
<td>3:00 - 4:00 p.m.</td>
<td>Concurrent Sessions #7</td>
</tr>
<tr>
<td></td>
<td>and Cengage Showcase</td>
</tr>
</tbody>
</table>

### WEDNESDAY, SEPT. 29

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:50 - 9:00 a.m.</td>
<td>Overview of the Day</td>
</tr>
<tr>
<td>9:00 - 10:00 a.m.</td>
<td>Constituency Councils</td>
</tr>
<tr>
<td>10:15 - 11:15 a.m.</td>
<td>General Session</td>
</tr>
<tr>
<td></td>
<td>Justin Jones-Fosu - Diversity, Equity, and Inclusion</td>
</tr>
<tr>
<td>11:30 a.m. - 12:30 p.m.</td>
<td>An Interview with Moody's</td>
</tr>
<tr>
<td>12:30 - 1:00 p.m.</td>
<td>Annual Business Meeting</td>
</tr>
<tr>
<td>1:00 - 1:30 p.m.</td>
<td>Break</td>
</tr>
<tr>
<td>1:30 - 2:30 p.m.</td>
<td>Concurrent Sessions #8</td>
</tr>
<tr>
<td>2:45 - 3:45 p.m.</td>
<td>Concurrent Sessions #9</td>
</tr>
<tr>
<td></td>
<td>and OneStream Showcase</td>
</tr>
<tr>
<td>3:50 - 4:00 p.m.</td>
<td>Closing Remarks</td>
</tr>
</tbody>
</table>
## CONCURRENT SESSIONS AT A GLANCE

### MONDAY, SEPT. 27

<table>
<thead>
<tr>
<th>Concurrent Sessions #1</th>
<th>Working Together to Build Net Revenue</th>
<th>Using AI Technology to Reduce Bottlenecks, Increase Enrollment and Enhance the Student Experience</th>
<th>Fraud: A Guide to Understanding and Combating Fraud Risk</th>
<th>2021 Benefits Trends and Benchmarking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concurrent Sessions #2</td>
<td>Ransomware</td>
<td>The Emergence of E-Sports on the Collegiate Level</td>
<td>Moving from Online Program Management Vendors to Institution Shared Services</td>
<td>Protect the Succession of Your Institution and Your Top Talent</td>
</tr>
<tr>
<td>Concurrent Sessions #3</td>
<td>Strategic Consolidation: Lessons Learned</td>
<td>Integrated Long-Range Financial Model</td>
<td>LIBOR - Impacts on Higher Education</td>
<td>Best Practices: Award Winner Presentation</td>
</tr>
<tr>
<td>Concurrent Sessions #4</td>
<td>Diversity and Inclusion Training</td>
<td>Scenario Planning to Improve Strategic Decisions</td>
<td>Fiscal Resiliency: Evaluating Intercollegiate Athletic Programs</td>
<td>A New Era of Financial Sustainability</td>
</tr>
</tbody>
</table>

### TUESDAY, SEPT. 28

<table>
<thead>
<tr>
<th>Concurrent Sessions #5</th>
<th>Trailblazers in Higher Education: How Female Leaders are Shaping the Past, Present, and Future</th>
<th>CPRe: Creatively (re)Positioning Your Real Estate</th>
<th>Using Financial Analysis to Impact Academic Programming Decisions</th>
<th>Endowment Performance: Virtual Lessons Learned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concurrent Sessions #6</td>
<td>Sunsetting Academic Programs: When, Why, and How</td>
<td>Cybersecurity: The Future is Now</td>
<td>Navigating Uncharted Tax Territories</td>
<td>Collaboration and Collisional Frequency: Celebrating the Culture of Business and Supporting Spaces</td>
</tr>
<tr>
<td>Concurrent Sessions #7</td>
<td>Closing Signals: Using Data in Decision Making</td>
<td>Be the Change: Driving Equity in a Time of Social Unrest</td>
<td>Reserves Strategy Canvas</td>
<td>WSU’s Pandemic Proofed Business Operations</td>
</tr>
</tbody>
</table>

### WEDNESDAY, SEPT. 29

<table>
<thead>
<tr>
<th>Concurrent Sessions #8</th>
<th>Understanding and Reducing Unconscious Bias</th>
<th>The Times are Changing: Mergers, Transfers of Operations, and New Standards</th>
<th>Designing a Retirement Plan that Benefits Participants and Universities</th>
<th>Best Practices: Award Winner Presentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concurrent Sessions #9</td>
<td>Managing Your Capital Projects through Project Monitoring and Construction Auditing</td>
<td>Secular Growth Endowment Investment Themes</td>
<td>Are Your Policies Advancing Your DEI Agenda</td>
<td>Simplifying Technology Complexity in the Higher Ed CFO Office</td>
</tr>
</tbody>
</table>
CONCURRENT SESSIONS #1

Monday, 10:15 - 11:15 a.m.

Monday, Sept. 27, 2021 | 10:15 - 11:15 a.m.
Session 1

101-A: Working Together to Build Net Revenue

Presenters: Susan Scroggins, Valparaiso University
Jim Hundrieser, NACUBO

**Session Description:**
This session provides ideas and ways to help business officers tackle their data and discuss ways to use data to inform decisions that align with institutional goals and fiscal realities. Specifically, we will look at how an institution can use data to create efficiencies in operations, inform ways to understand cost models, link cost understanding to enrollment strategy and instill data-informed targeted strategies for action. We will consider ways to understand program costs and how finance, academic and enrollment teams can work together to build net revenue through targeted activities.

**CPE Information:**
**Delivery Method:** Presented online due to COVID-19
**Subject Area:** Finance
**Prerequisite:** None
**Knowledge Level:** Basic
**Recommended CPE:** 1.2 hours
Monday, Sept. 27, 2021 | 10:15 - 11:15 a.m.
Session 1

101-B: Using AI Technology to Reduce Bottlenecks, Increase Enrollment and Enhance the Student Experience

Presenters: James Kennedy, Indiana University
Dorothy Frink, Indiana University
Mary Frances Coryell, Ivy.ai

**Session Description:**
Learn how the regional campuses of Indiana University implemented a meaningful student-support system to effectively guide students through their digital journey using AI Technology. Utilizing real-time data, IU adapts information sources and website architecture to reduce bottlenecks and provide streamlined on-channel support; scale tier-1 service requirements; improve staff efficiencies; and enhance user experience, while gathering and leveraging valuable data for future improvements. By capitalizing on features such as lead capture forms, ontology workflows and integration into their SI, IU has enhanced user experience while increasing student enrollment.

**CPE Information:**
*Delivery Method:* Presented online due to COVID-19
*Subject Area:* Information Technology
*Prerequisite:* None
*Knowledge Level:* Basic
*Recommended CPE:* 1.2 hours

Monday, Sept. 27, 2021 | 10:15 - 11:15 a.m.
Session 1

101-C: Fraud: A Guide to Understanding and Combating Fraud Risks

Presenter: Bryan Callahan, BKD

**Session Description:**
From admissions schemes, to athletic department scandals, to embezzlement, experts estimate the average higher ed institution loses 5 percent of its annual revenue to fraud. During this session, we will examine the latest fraud schemes, using the 2020 Association of Certified Fraud Examiners Report to the Nations, and discuss ways institutions can use technology to combat fraud risk.

**CPE Information:**
*Delivery Method:* Presented online due to COVID-19
*Subject Area:* Accounting
*Prerequisite:* None
*Knowledge Level:* Basic
*Recommended CPE:* 1.2 hours
Session 1

101-D: 2021 Benefit Trends and Benchmarking

Presenters: Emily Brainerd, Gallagher
Nichole Johnson, Gallagher

Session Description:
An integrated approach to compensation, benefits, retirement, employee communications and workplace culture is always central to success. But what’s worked in the past won’t necessarily be sufficient moving forward. By accessing and understanding the right information, you can empower your organization to take strategic action backed by data-driven insights. During this session, we will interpret and derive strategic findings from Gallagher’s 2021 Benefits Strategy and Benchmarking Survey, that has gathered data designed to help organizations confidently face the future.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Personnel/ HR
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
CONCURRENT SESSIONS #2

Monday, 11:30 a.m. - 12:30 p.m.

Monday, Sept. 27, 2021 | 11:30 a.m. - 12:30 p.m.
Session 2

201-A: Ransomware

Presenters: Adam Bulava, JP Morgan
Max Alexander, JP Morgan

Session Description:
Ransomware has become more prevalent over the past two years with attacks now occurring every 11 seconds. Despite being more reliant on technology than ever, many organizations remain under prepared for responding to a ransomware attack, as over 60 percent of organizations surveyed recently reported that it would take five or more days to fully recover from a ransomware attack if they didn’t pay the ransom. This panel will examine recent ransomware trends, response and preparedness best practices, review key parties involved in developing a ransomware strategy, and provide an overview how those partners can be leveraged to minimize impact if your institution is targeted.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Information Technology
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
201-B: The Emergence of E-Sports on the Collegiate Level

Presenters: Stuart Goldfarb, Electronic Gaming Federation
Ronald Nahass, RSM US

Session Description:
The electronic sports industry has achieved explosive growth in recent years, with revenues exceeding $1 billion and attracting global audiences of 443 million in 2019. Unsurprisingly, this popularity has carried over to college campuses where 175 higher education institutions offer varsity E-Sports programs. With the NCAA voting in May 2019 that E-Sports was not within the purview of its jurisdiction, schools have been left to navigate this new landscape on their own. This cross-functional discussion will discuss emerging topics including:

- Understanding the current state of E-Sports in higher education, key revenue streams, growth areas and risk areas
- Understanding regulatory framework
- Learn best practices for internal controls for tracking and monitoring collegiate E-sport programs

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Specialized Knowledge
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours

201-C: Moving from Online Program Management Vendors to Institution Shared Services

Presenters: Jason Lemon, University of Cincinnati
Hal Jankowski, University of Cincinnati

Session Description:
With the impact of COVID, the online opportunity will only be realized when faculty and administrators can trust an internal support structure that proves itself loyal to mission, vision, and values of the institution. After nearly 20 years of working with online program management vendors, University of Cincinnati’s built an internal OPM - UC Online. One of only a small number of institutions that have successfully transitioned from external OPMs to an internal, shared service, UC is one of the top online-enrolled institutions. Learn some of the keys to UC Online’s success and how it is changing the paradigm for supporting the full, online student lifecycle.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Business Management and Organization
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
Monday, Sept. 27, 2021 | 11:30 a.m. - 12:30 p.m.
Session 2

201-D: Protect the Succession of Your Institution and Your Top Talent

Presenter: Rich Brock, Gallagher

**Session Description:**
The responsibility for developing, nurturing and maintaining the crucial relationships, proprietary processes and valuable assets that make your organization competitive falls on its top executives and key leaders. Where are the gaps that make an organization vulnerable? How can solutions like key and buy-sell coverage help minimize the impact a partner, equity stakeholder or crucial employee would have on an organization? We will discuss how organizations can customize plans to keep top talent and exceptional leaders engaged and the organization protected.

**CPE Information:**
*Delivery Method:* Presented online due to COVID-19
*Subject Area:* Personnel/ HR
*Prerequisite:* None
*Knowledge Level:* Basic
*Recommended CPE:* 1.2 hours
CONCURRENT SESSIONS #3

Monday, 1:30 - 2:30 p.m.

301-A: Strategic Consolidation: Lessons Learned

Presenters: Gerald Moench, Rockhurst University
Kaleb Lilly, RubinBrown
Corey Robinson, RubinBrown

Session Description:
Leaders from Rockhurst University and RubinBrown will share lessons learned in the consolidation of the university with St. Luke’s College of Health Sciences. This session will cover how Rockhurst established a strategic direction for the university, what lessons were learned in executing the transaction, and the continued work post-closing. Broader management topics will be covered as well as specific accounting and finance considerations.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Business Management and Organization
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
Session 3

301-B: Integrated Long-Range Financial Model

Presenter: Dave Aune, Anoka Ramsey Community College/Anoka Technical College

Session Description:
The Anoka Ramsey Community and Anoka Technical Colleges — located in Anoka, Minnesota — have developed an interactive, long-range financial model to better illustrate various scenarios for enrollment, tuition, cost of instruction delivery, other revenue, and expense and capital spending, to ensure financial sustainability is maintained. Following the start of the COVID-19 pandemic, our colleges utilized this tool when enrollments fell to strategize on returning to financial sustainability and to educate our campus leadership, faculty and staff of the challenges and efforts needed to achieve our financial goals.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Finance
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours

Session 3

301-C: LIBOR - Impacts on Higher Education

Presenters: Scott Talcott, Blue Rose Capital Advisors
David Stephens, BofA Securities
Nancy Burke, Chapman
Cutler Michael Sieva, Davenport University

Session Description:
In July of 2018, the UK Financial Conduct Authority announced that the London Interbank Offer Rate (LIBOR) would cease publication by October 2021. Following this announcement, the Federal Reserve Bank of New York has endeavored to introduce a new benchmark rate (SOFR) as a replacement to U.S. dollar denominated LIBOR. More recently, the FCA announced the formal cessation dates for various LIBOR tenors and currencies. Given these announcements and the certainty that the LIBOR will soon cease to exist, many business officers in higher education have sought further understanding of the discontinuation of LIBOR and its implications.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Finance
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
Monday, Sept. 27, 2021 | 1:30 - 2:30 p.m.
Session 3

301-D: Best Practice Award - To Be Announced

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: TBA
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
CONCURRENT SESSIONS #4

Monday, 2:45 - 3:45 p.m.

Session 4

401-A: Diversity and Inclusion Training

Presenters: Adrian Velez, University of Chicago
Adrian Perkins, University of Chicago
Christal Wilson, University of Chicago

**Session Description:**
This presentation focuses on diversity, equity and inclusion within the work environment and beyond. Drawing upon our framework at University of Chicago, we will discuss the importance of making diversity, equity and inclusion a core value for your organization. Participants will build skills towards creating a more inclusive work environment, and leave with information related to available university resources.

**CPE Information:**
- **Delivery Method:** Presented online due to COVID-19
- **Subject Area:** Personnel/ HR
- **Prerequisite:** None
- **Knowledge Level:** Basic
- **Recommended CPE:** 1.2 hours
Session 4

401-B: Scenario Planning to Improve Strategic Decisions

Presenters: Michael Horan, Illinois Institute of Technology
Mary Ellen Borchers, Illinois Institute of Technology
Michael Nicolescu, Synario

Session Description:
In a rapidly changing higher education marketplace, stakeholders need to devote more time and energy to thinking about the future. Illinois Institute of Technology implemented a disciplined, multi-year financial planning approach to simplify complex strategic decisions and establish credibility with the board of trustees and other senior leadership. Financial and scenario planning are a powerful combination. By considering alternative scenarios of key decisions - including enrollment and funding strategies - Illinois Institute of Technology gained an increased confidence in the financial future of the institution.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Finance
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours

Session 4

401-C: Fiscal Resiliency: Evaluating Intercollegiate Athletic Programs

Presenters: Susan Maloney, Baker Tilly
Michael McFarland, Bloomsburg University

Session Description:
Colleges and universities have been hit by a tsunami of financial issues. As institutions have attempted to bridge the gulf in their financials, they have considered reducing or eliminating athletic programs as an easy fix. Completing a deep analysis of all the contributions of each athletic team can provide the necessary data for institutional leaders to make informed decisions. In this session, we will provide a contribution margin template and a process model for an athletic program and present a case study where the assumptions were turned upside down when a comprehensive data analysis was applied to the decision-making process.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Specialized Knowledge
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
Monday, Sept. 27, 2021 | 2:45 - 3:45 p.m.
Session 4

401-D: A New Era of Financial Sustainability

Presenters: Trinidad Rodriguez, D.A. Davidson & Co.
Alexandra Iseman, D.A. Davidson & Co.
Karen Davis, California Lutheran University
Carla Ho-a, University of Colorado Boulder

Session Description:
A panel of higher education CFOs and D.A. Davidson higher education investment bankers will present and lead an interactive discussion on the critical and timely topic of financial sustainability under current industry and market conditions. Some strategies that could be explored:

- Leveraging illiquid assets in new ways
- Innovative cost savings approaches
- Debt portfolio management
- Acquisition of and partnerships with other institutions

Attendees will leave inspired with topics that can start and support continued discussion about financial sustainability at their own institutions.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Business Management and Organization
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
CONCURRENT SESSIONS #5

Tuesday, 10:30 - 11:30 a.m.

Tuesday, Sept. 28, 2021 | 10:30 - 11:30 a.m.
Session 5


Presenters: Susan Scroggins, Valparaiso University
Kerry Jessani, JPMorgan Chase & Co.
Pam Cain, Iowa State University
Kim Wagner, Elgin Community College

Session Description:
Creating a more diverse workforce, which includes women in leadership roles, is a goal for many higher ed and corporate institutions. From a practical perspective, how can colleges and universities make this aspiration a reality? Drawing from their experiences in both higher education and the private sector, this panel of diverse women CBOs will share personal strategies for overcoming professional challenges. They will also discuss strategies for recruiting, developing and retaining the next generation of women in higher education to build on the current progress.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Personal Development
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
Tuesday, Sept. 28, 2021 | 10:30 - 11:30 a.m.
Session 5

501-B: CPRe: Creatively (re)Positioning Your Real Estate
Presenter: Kevin Scully, Design Collaborative
John Jones, Indiana Wesleyan University at Marion

Session Description:
Does it feel like some of your real estate assets need CPR? Now more than ever, colleges and universities strive to serve the students, faculty and staff by providing safe and efficient facilities, as well as provide for optimal learning, teaching, working, living, sporting, performing, and leisure activities - all within strapped capital, operating and maintenance budgets. Facilities designed and constructed 50 or even 10 years ago may not fit your user needs today. Through space analysis studies, your existing facilities can support your recruitment and retention efforts, increase revenue and save costs.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Business Management and Organization
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours

Tuesday, Sept. 28, 2021 | 10:30 - 11:30 a.m.
Session 5

Presenters: Lisa Mazure, Lansing Community College
Matt Behnke, Rehmann

Session Description:
As institutions look for ways to improve financial position through various methods, activity-based costing is effective in determining the true cost of higher education programs. By identifying unprofitable programs, institutions are armed with information to make decisions of whether to continue programs not contributing to the institutions’ success. This session focuses on how to identify program revenue and expenses and how to effectively analyze the viability of academic programs. Attendees will learn what components should be considered in revenue and expenses, as well as the impact of factors like section size, seat count, and teacher to student ratio. Additionally, the session will touch on the impact of the pandemic on the cost of providing higher education programs.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Accounting
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
Tuesday, Sept. 28, 2021 | 10:30 - 11:30 a.m.
Session 5

501-D: Endowment Performance: Virtual Lessons Learned

Presenters: Floyd Simpson, PFM Asset Management
Carol Barbour, PFM Asset Management
Gary Rozier, City Colleges of Chicago Foundation

Session Description:
The COVID-19 pandemic took most educational institutions into uncharted waters. Higher education institutions were faced with a virtual environment for students, faculty, staff and boards, operating margins compression from tuition revenue declines, spending level issues and debt level concerns. The role of the endowment to serve as a perpetual pool of assets to support financial aid, programs, faculty and operating budgets and provide stability of the operations became more important and dependent on good governance to help weather disruptors such as market volatility, COVID and enrollment declines. In this presentation, we talk about some of the opportunities City Colleges took advantage of including navigating volatility, taking nimble shifts through tactical allocation and changing how we do things.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Finance
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
CONCURRENT SESSIONS #6

Tuesday, 12:30 - 1:30 p.m.

Tuesday, Sept. 28, 2021 | 12:30 - 1:30 p.m.

Session 6

601-A: Sunsetting Academic Programs: When, Why, and How

Presenters: David Armstrong, BKD
Clair Knapp, Manchester University

Session Description:
As colleges and universities struggle with enrollment trends and budget implications, conversations of program sunsetting are beginning to take shape. This presentation will provide business and financial leaders with crucial data points to consider and discuss best practices to follow as well as pitfalls to avoid. We will discuss the critical role that financial leaders serve in these important conversations and review examples of successful and failed sunsetting processes.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Specialized Knowledge
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
Tuesday, Sept. 28, 2021  |  12:30 - 1:30 p.m.
Session 6

601-B: Cybersecurity: The Future is Now

Presenters: Gina Cregg, University of Kansas Center for Research
David Morris, U.S. Bank

Session Description:
Technologies such as artificial intelligence, block chain, Internet of Things devices, and peer-2-peer payment solutions have the potential to revolutionize our lives and how we do business as more of the global economy becomes digitized. At the same time, the advent of this new technology has further expanded risks from data breaches, ransomware, business disruption, reputational damage, fraud and other criminal activity. How can businesses cope with the security challenges of the future? In this conversation, we discuss the current cybersecurity landscape and what universities can do to prepare now.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Information Technology
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours

Tuesday, Sept. 28, 2021  |  12:30 - 1:30 p.m.
Session 6

601-C: Navigating Unchartered Tax Territories

Presenter: Lawrence Mohr, Baker Tilly
Shelby Netz, Baker Tilly

Session Description:
The higher education industry is experiencing tremendous change as a result of the COVID-19 pandemic and other fiscal challenges that impact tax compliance. This session will outline key tax legislative changes impacting colleges and universities that were part of the Coronavirus Aid, Relief, and Economic Security (CARES) Act, Consolidated Appropriations Act of 2020 and the American Rescue Plan Act of 2021, as well as the final regulations of the unrelated business income (UBI) tax activities rules under IRC section 512(a) (6). We will provide a quick overview of unrelated business income (UBI) and walk through the requirements to separate or silo activities deemed an unrelated trade or business. This will include a discussion about NAICS 2-digit codes, the classification of a qualifying partnership investment (QPI) and ownership thresholds. We will tie into the presentation the reporting requirements that could arise from the Schedules K-1 issued by investment partnerships, including federal, state and international reporting requirements. This will include steps and tips for reviewing the Schedule K-1 footnotes from investment partnerships and best practices for working with a tax advisor to ensure compliance.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Taxes
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
Tuesday, Sept. 28, 2021  |  12:30 - 1:30 p.m.
Session 6

601-D: Collaboration and Collisional Frequency:
Celebrating the Culture of Business and the Spaces that Support Them

Presenters: Michael Schuesler, Bowling Green State University
Joe Connell, Perkins Will
Jessica Figenholz, Perkins Will

Session Description:
Change is always difficult in higher education settings, given academic expectations and affordances. The new Maurer Center business school design underscores the strategy to develop flexible, adaptable and experienced graduates prepared for today’s and tomorrow’s employers. With over two dozen ways to work and study, areas are dispersed throughout to allow for peer-to-peer cross-disciplinary connections and encourage a range of formal and informal encounters. This new culture of collaboration celebrates the practice of business and introduces students to their future careers as a transition from academia.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Business Management and Organization
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
CONCURRENT SESSIONS #7

Tuesday, 3:00 - 4:00 p.m.

Tuesday, Sept. 28, 2021 | 3:00 - 4:00 p.m.
Session 7

701-A: Closing Signals: Using Data in Decision Making

Presenter: Adam Smith, BKD

Session Description:
The dire predictions about an upcoming tidal wave of college and university closures, along with continued media focus on the pressures facing the industry, forecast a grim future for higher education. But what can we learn from data? This session will provide an overview of the data and trends on higher education closures and understand how the facts line up with perception. In addition, we'll examine recent non-profit closures to recognize the common financial metrics and other indicators shared between these shuttered institutions. Through understanding the top financial and other indicator commonalities between closed institutions, vested parties in higher education are better prepared to discuss, guide and lead their institutions.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Finance
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
Session 7

701-B: Be the Change: Driving Equity in a Time of Social Unrest

Presenter: Corie Pauling, TIAA

Session Description:
During the unrest of 2020, many organizations made statements of support for equity. For the community to perceive these statements as authentic, organizations must back them up with action. Be the Change is an initiative driving racial equity in the community and within the organization, with the latter efforts focused especially on internal mobility. Using existing initiatives and new programs to reach its goals, it measures success by utilizing inclusion index score improvements and strong participation in programs.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Personnel/HR
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours

Session 7

701-C: Reserves Strategy Canvas

Presenters: Patricia Amick, Metropolitan Community College
Don Chruscien, Metropolitan Community College
Kim Luken, Metropolitan Community College

Session Description:
The Metropolitan Community College (MCC) in Kansas City, Missouri, Finance and Administrative Services Division needed a tool to aid in identifying a financial reserves plan and to be fiscally responsible. After a literature review regarding institutional reserves, MCC combined two key themes: One was a reserve tactic, while the other was the strategy canvas, borrowing the basic understanding from the author of Blue Ocean (2005, Chan & Mauborgne). Combining the two, they created the “Strategy Reserve Canvas” as the institution’s reserve strategy.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Finance
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
Tuesday, Sept. 28, 2021 | 3:00 - 4:00 p.m.
Session 7

701-D: WSU’s Pandemic Proofed Business Operations

Presenters: Robyn Bongartz, Wichita State University
Melody Schongar, Touchnet
Kelsey Ingram, Touchnet

Session Description:
Having a unified approach to campus commerce made sure Wichita State was well prepared for any scenario, even a global pandemic. Having the ability offer business office services both online and in person allowed them to maintain the same level of service excellence for all of their customer groups. It also eased reconciliation, provided a consistent experience for staff and students, extended payment capabilities for internal departments and groups and delivered insight and reporting needed for critical business decisions.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Finance
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
Wednesday, Sept. 29, 2021 | 1:30 - 2:30 p.m.
Session 8

801-A: Understanding and Reducing Unconscious Bias

Presenter: Thresette Briggs, Indiana University Kelley School of Business

**Session Description:**
Everyone has unconscious biases, at least partially influenced by factors from our background and personal experiences or societal stereotypes. Not understanding unconscious bias can hurt relationships with peers and team members at work and in the community you serve. It is important to be aware of and address your own biases by becoming conscious of them so you can reduce them and support a culture of inclusion.

**NOTE:** To enhance your self-awareness and learning during the session, you are encouraged to take the confidential online assessment before attending, that will be provided upon registration, along with instructions for access.

**CPE Information:**
**Delivery Method:** Presented online due to COVID-19
**Subject Area:** Business Ethics
**Prerequisite:** None
**Knowledge Level:** Basic
**Recommended CPE:** 1.2 hours
801-B: The Times Are Changing: Mergers, Transfers of Operations and New Standards

Presenters: Shea Bryant, Michigan State University
Katie Thornton, Plante Moran
Brian Greko, Plante Moran

Session Description:
Michigan State University, like many universities, has undergone a lot of change in recent years. The university merged law colleges and transferred operations of its health care clinics, all while preparing for some significant new GASB standards. This presentation will explore the strategies surrounding these reporting entity changes, the accounting implications and related preparation, and a brief discussion of the university’s efforts preparing for GASB 84 (Fiduciary Activities), GASB 87 (Leases) and GASB 94 (Public-Private and Public-Public Partnerships).

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Accounting
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours

801-C: Designing a Retirement Plan that Benefits Participants and Universities

Presenters: Richard Reed, Segal
Norman Jacobson, Segal
Tracy Stough Grajewski, Juniata College

Session Description:
During these challenging times, many colleges and universities are seeking out new measures to save money while continuing to preserve workplace culture and present a competitive edge for attracting new talent. A strategically built and structured DC plan is a feasible solution for ensuring your people goals are aligned with your long-term university goals. A current analysis of your plan’s design is the starting point for re-strategizing to address emerging issues, such as participation, changing workforces, contribution allocation and retirement readiness. In this session, we will develop goals for aligning your retirement plan with your people, individual and enterprise strategies, as well as review innovative design features to help retirement ready participants identify alternative solutions to help reduce your institutional retirement costs while still remaining competitive in the marketplace.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Finance
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
Wednesday, Sept. 29, 2021 | 1:30 - 2:30 p.m.

Session 8

801-D: Best Practices Award - To Be Announced

**CPE Information:**
**Delivery Method:** Presented online due to COVID-19
**Subject Area:** TBA
**Prerequisite:** None
**Knowledge Level:** Basic
**Recommended CPE:** 1.2 hours
CONCURRENT SESSIONS #9

Wednesday, 2:45 - 3:45 p.m.

Wednesday, Sept. 29, 2021 | 2:45 - 3:45 p.m.
Session 9

901-A: Managing Your Capital Projects Through Project Monitoring and Construction Auditing

Presenters: Stephen Strohman, Brown Smith Wallace
Matthew Conlon, Washington University in St. Louis

Session Description:
Institutions are investing millions of dollars into capital projects to expand and improve their campuses and facilities, which often risk schedule delays and cost overruns. In a climate of declining revenue, it is imperative the costs of these projects are effectively monitored and controlled. This presentation will focus on processes to ensure effective management and cost control of your projects, particularly:

• Risks and challenges of managing construction projects
• Using construction audits to assist in controlling costs and noncompliance with contract terms
• Collaboration between owner and construction audit team

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Business Management and Organization
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
Wednesday, Sept. 29, 2021 | 2:45 - 3:45 p.m.
Session 9

901-B: Secular Growth Endowment Investment Themes

Presenters: Johnathan Swanson, Graystone Consulting
Jakki Edwards, Northwestern Health Sciences University

Session Description:
In the late 19th century, three innovative ideas evolved at the same time and changed the way we function as a society. The telephone, the automobile, and electricity changed everything. With their introduction, global productivity exploded as costs dropped, unleashing incredible demand across sectors. Today, we believe the global economy is undergoing the largest technological transformation in history thanks to the confluence of several revolutionary technologies. Such innovations include driver-less cars, life sciences innovation, cryptocurrencies, artificial intelligence, and more. Innovation should displace industry incumbents, increase efficiencies, and gain majority market share. While we believe the threat to existing businesses is grave, the long-term opportunities for companies and higher education endowment investors participating in this change could be measured in the trillions. In this presentation, we will highlight some of these groundbreaking themes as well as other ways that endowment managers can help grow endowment purchasing power for decades to come.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Finance
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours

Wednesday, Sept. 29, 2021 | 2:45 - 3:45 p.m.
Session 9

901-C: Are Your Policies Advancing Your DEI Agenda?

Presenters: Autumn Anfang, St. Norbert College
Allison Vaillancourt, Segal Consulting

Session Description:
Escalating demands for diversity, equity and inclusion have prompted institutions to evaluate their practices and organizational culture. Many colleges and universities are conducting climate assessments and examining hiring, promotion and pay practices. However, few are taking a critical look at institutional policies that may be hampering their efforts to diversify and support the success of their current and potential faculty, staff and students. This session will outline an effective process for analyzing policies through a DEI lens to ensure that policies advance - rather than inhibit - DEI goals.

CPE Information:
Delivery Method: Presented online due to COVID-19
Subject Area: Personnel/ HR
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
Wednesday, Sept. 29, 2021 | 2:45 - 3:45 p.m.
Session 9

901-D: Simplifying Technology Complexity in the Higher Ed CFO Office

Presenters: Anthony Pember, Grant Thornton
Kevin Mims, OneStream Software
Priya Mharte, Grant Thornton

**Session Description:**
Grant Thornton will share their unique perspective on CFO technology in the higher education space, both historically as well as the current public perception of ever-increasing college costs. CFO technology cost can potentially be lowered through modernization, allowing for ease of use combined with ease of maintenance. OneStream will also share their perspective as well based on the University of Florida College of Medicine.

**CPE Information:**
Delivery Method: Presented online due to COVID-19
Subject Area: Information Technology
Prerequisite: None
Knowledge Level: Basic
Recommended CPE: 1.2 hours
CACUBO MISSION
CACUBO serves higher education business and finance professionals by providing opportunities for professional and personal development and facilitating collegial relationships and networks resulting in improved management within our member institutions. CACUBO promotes ethical behavior, innovation and through our relationships with NACUBO, advocacy for higher education.

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