



NEW SIGHTS, GREATER HEIGHTS

EACUBO 2018 ANNUAL MEETING



EACUBO

OCTOBER 21-24

BUFFALO NIAGARA CONVENTION CENTER | BUFFALO, NY

Program Guide Sponsored by:

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SCHEDULE AT A GLANCE

Sunday, October 21

12:00–5:00 PM	Registration & Information Desk
12:00–5:00 PM	Complimentary Buses to Niagara Falls (New York side)
4:00–5:00 PM	Women's Leadership Reception
4:00–6:00 PM	Fall Mentoring Session*
6:30–7:00 PM	First Time Attendee Reception
7:00–9:00 PM	Welcome Reception

Monday, October 22

7:30 AM–5:00 PM	Registration & Information Desk
7:30–8:30 AM	CFO Breakfast*
7:30–9:00 AM	Networking Breakfast in the Exhibit Hall
9:00–10:15 AM	General Session
10:25–11:25 AM	Concurrent Sessions
11:25 AM–12:15 PM	Networking Lunch
12:15–1:00 PM	Dessert in the Exhibit Hall
1:00–2:00 PM	Concurrent Sessions
2:00–3:30 PM	Break in the Exhibit Hall with Micro Sessions
3:30–4:30 PM	Concurrent Sessions
4:30–6:00 PM	Happy Hour in the Exhibit Hall
6:00–8:30 PM	Regional Presidents' Dinner*
8:30–10:00 PM	Cheers! Reception



Tuesday, October 23

7:30 AM–5:00 PM	Registration & Information Desk
7:30–8:30 AM	Chair's Business Partner Breakfast*
7:30–9:00 AM	Networking Breakfast in the Exhibit Hall
7:30–9:00 AM	New to Higher Education Breakfast**
9:00–10:30 AM	General Session and NACUBO Update
10:30–10:45 AM	Break
10:45–11:45 AM	Concurrent Sessions
11:45 AM–1:15 PM	Lunch and Last Hurrah in the Hall
1:15–2:15 PM	Concurrent Sessions
2:25–3:25 PM	Concurrent Sessions
3:25–3:45 PM	Break
3:45–5:15 PM	General Session and EACUBO Business Meeting
5:15–7:00 PM	Networking Reception

Wednesday, October 24

7:30–11:30 AM	Registration & Information Desk
7:30–8:30 AM	Networking Breakfast
8:30–9:30 AM	General Session
9:30–9:45 AM	Break
9:45–10:40 AM	Concurrent Sessions
10:40–11:00 AM	Break
11:00–11:55 AM	Concurrent Sessions

* by invitation only

** limited seating



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On behalf of the EACUBO ~~Board~~ Program and Services Committee, I am pleased to welcome you to Buffalo, NY, for the EACUBO 2018 Annual Meeting—"New Sights, Greater Heights." Whether you are here to discuss current issues, learn about best practices, develop professional relationships, or prepare for a promotion, this program has been conceived to provide a wide range of professional development resources.

Our accomplished general session presenters will engage us in innovation, negotiations and diplomacy, change management, and technology, while more than 30 concurrent sessions will address a wide range of topics including FASB and GASB updates, program analysis, facilities management, leadership, and technology.

The Wednesday morning program will start with a keynote address on the changing technology landscape in higher education and will be followed by related concurrent sessions that dive deeper into the topic. The Wednesday concurrent sessions will be offered more than once so that participants may attend two of the three offerings.

The Annual Meeting provides a rich environment for networking with colleagues, so you count on returning to campus with new professional contacts and having caught up with old friends. Our trusted business partners are prepared to help you learn about the many products and services they offer. Additionally, exhibitors are ready to demonstrate their innovative products and services, all designed to make your job easier and more productive and to add value to your organization.

In closing, we welcome your feedback on your experiences throughout the program, as well as your thoughts and how EACUBO can continue to improve and meet your needs.

A handwritten signature in blue ink that reads "Steve".

Stephen Schafer
Program & Services Committee Chair
Vice President, Finance & Operations, Sarah Lawrence College



EACUBO: NEW SIGHTS, GREATER HEIGHTS

THE 99TH ANNUAL MEETING BUFFALO, NEW YORK

This year's theme and location is emblematic of the energy higher education business officers apply towards the betterment of an individual college or university while effectively collaborating towards a shared success of our broader higher education community. While daily challenges are varied, we know the issues and our actions of today will, undoubtedly, have effects that resonate down the road. Through networking and sharing our ideas and expertise, best practices and challenges, our higher education institutions are able to grow stronger - thereby not only confronting industry headwinds, but excelling beyond current expectations; individually and collectively, reaching greater heights.

Recognizing its unique opportunity to help provide that support, the Eastern Association of College and University Business Officers (EACUBO) led by its Board of Directors, committee members, and volunteers continue to design and implement events, programs, and services that focus on key areas by offering:

- ✓ Interactive sessions that detail best practices and actionable solutions that you can apply when you return to your institution;
- ✓ Opportunities for meaningful connections with colleagues in order to expand your professional network; and,
- ✓ Strategic leadership and professional development for all career levels.

Active engagement with your EACUBO colleagues brings rewards—personally, professionally, and for our shared, higher education community. Please consider:

- Encouraging your campus colleagues to participate in EACUBO activities. Our Annual Meetings provide a supportive community that can enhance their careers;
- Providing your feedback on our progress so we can enhance your personal and professional experiences with EACUBO;
- Volunteering to serve the EACUBO membership and our shared industry. Your ideas and work on our planning committees and session proposals will shape our Association's future; and,
- Staying connected to EACUBO by joining us on LinkedIn and following us on Twitter.

In sum, the EACUBO Annual Meeting provides a setting where big and small ideas alike can be created or learned and then customized to be of the greatest value to our own unique institutions. In doing so, we can and will enhance the value of the higher education business officer and thereby support the educational mission of our colleges and universities, students, scholars, faculty, researchers, fellow employees, alumnae and the broad base of varied constituents in the local and global communities we serve.

EACUBO'S KPMG DISTINGUISHED SERVICE AWARD



Each year, EACUBO recognizes an individual who has made significant contributions to the Association's activities. The membership is asked to submit nominees who cultivate and embody a strategic leadership mindset and reflects EACUBO's core values in fostering a sense of community and collegiality. EACUBO is proud to announce this year's honoree, *Maureen Murphy!*

Vice President for Administration and Finance Emerson College

Maureen Murphy is Vice President for Administration and Finance at Emerson College, Boston, MA. Previously, she was Vice President for Financial Affairs and Treasurer at Brandeis University and former Chief Financial Officer at New York University in Abu Dhabi.

Maureen has managed operating budgets of more than \$200 million and an endowment of \$600 million. She has more than 25 years of experience and leadership in financial management, administration, and capital project planning and oversight. She has also held leadership position in the National Association of College and University Business Officers (NACUBO), the Eastern Association of College and University Business Officers (EACUBO), and The Boston Consortium (TBC) of colleges and universities in Greater Boston.

An honors graduate of Northeastern University, Maureen holds a master's degree in accounting from Northeastern and a master's degree in taxation from Bentley University. Prior to her assignments at Brandeis and NYU, she worked at Tufts University and at the KPMG accounting firm.



EACUBO 2018 ANNUAL MEETING SPONSORS

EACUBO would like to thank its business partners for their generous support of the EACUBO Annual Meeting.

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Workday



EACUBO 2018 ANNUAL SPONSORS (BY EVENT)

Accenture	Concurrent Session Tuesday Last Hurrah in the Hall
Aircuity, Inc.	Micro Session in Exhibit Hall
Aramark	Welcome Reception
Baker Tilly	Chair's Reception
Bank of America Merrill Lynch	Chair's Dinner; Monday Breakfast
Barclays	General Sponsorship
Barnes & Noble College	Wireless Internet
Benchmark Construction Company Inc.	Cheers! Reception
CBIZ	Meeting Tote
Century Bank	Bag Insert
Chartwells Higher Education Dining Services	Monday Dessert in the Exhibit Hall
CliftonLarsonAllen LLP	Happy Hour in the Exhibit Hall
CohnReznick LLP	General Session
CTM Visitor Revenue	Micro Session in Exhibit Hall
Deloitte	Welcome Reception Entertainment Bag Insert
ENGIE	Concurrent Session Bag Insert
Follett Higher Education Group, Inc	Networking Reception Bar
George K. Baum	Concurrent Session
Grant Thornton LLP	General Session
HelioCampus	Micro Session in Exhibit Hall
Hinckley Allen	Tuesday Morning Break in the Exhibit Hall
Huron Education	Bag Insert
J.P. Morgan	General Session Happy Hour in the Exhibit Hall
KeyBanc Capital Markets	Welcome Reception



EACUBO 2018 ANNUAL SPONSORS (BY EVENT)

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Tuition Management Systems

Wells Fargo Bank

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Workday

Networking Reception

Monday Lunch

Bag Insert

Wednesday
Morning Break

Cheers! Reception

Concurrent Session
Buses to Niagara Falls

Micro Session
in Exhibit Hall

Concurrent Sessions

Networking Reception

Tuesday Breakfast

Program Guide

Bag Insert

Name Badge Lanyards

Wednesday Breakfast

Chair's Reception

General Sponsorship

Chair's Dinner;
Regional Presidents' Dinner

Charging Station

General Session

CFO Breakfast

General Sponsorship

Welcome
Reception Entertainment

TECHNOLOGY INFORMATION

WiFi is Available Throughout Meeting Space

Network: EACUBO 2018
Password: Barnes&Noble

Sponsor:

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NAVIGATE THE EVENT LIKE A PRO WITH THE 2018 ANNUAL MEETING MOBILE APP



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MOBILE APP TIPS AND TRICKS

Manage- Tap the gear icon to sync the app across all your devices and build your profile.

Connect- Go to the Attendee list icon, select an attendee and "request friend". You can also bookmark exhibitors.

Create a Schedule- You can build a personalized schedule by tapping the "Events" icon with the sessions listed by day, just tap the star on the side menu of each session

Download Presentations- At the bottom of each session is a Resource Box tap "Handouts".

Take Notes- Tap the pencil icon on the side menu of the session. Email the notes to yourself or save them.

SEARCH the App Store or Google Play for "EACUBO"

FOR ALL OTHER DEVICE TYPES:

Visit www.core-apps.com/dl/eacubo18am to download the appropriate version of the app.

Once the app opens, select EACUBO 2018 Annual Meeting and tap Download. If you already have the EACUBO app on your device, open it and tap "Exit to Show List" from the Dashboard to view the app for this event.

Please feel free to contact support@core-apps.com with any questions.

www.eacubo.org



CHARGING STATIONS

Keep your mobile devices charged so you can continue to enjoy the mobile app and tweet about your Annual Meeting experience!

Visit the charging station located in the Lobby.

Sponsor: 

INTERNET CAFE

Need to check your e-mail, reference a source, or print a document? Please visit our Internet Café located in the Lobby.

SPEAKER READY ROOM

Visit the Speaker Ready Room in 103. This room provides a private space to work on any presentation updates.

HOURS:

Monday, October 22
7:30 AM–4:00 PM.

Tuesday, October 23
7:30 AM–4:00 PM





CONTINUING PROFESSIONAL EDUCATION

Participants submitting requests for CPE credits must provide an adequate record of participation in accordance with the standards issued jointly by the National Association of State Boards of Accountancy and the American Institute of CPAs. In order to meet this standard, EACUBO will require participants applying for CPE credits to scan the barcode on their badge when entering each session. Each person's barcode is specific to their registration record so please be sure to have your badge available for each session. Scanning is the responsibility of each participant and must be completed within 10 minutes of when each session begins. Credit will not be awarded if you arrive more than 10 minutes after the scheduled start of session. If you have any issues with your barcode not scanning or other technical glitches, please alert staff on site as soon as possible. Scanning issues can only be corrected on site. After this professional development meeting, CPE certificates will be available online within two- to four- weeks for those attendees who scanned into sessions.

The learning objectives for attendees at this professional development meeting are the introduction or enhancement of critical technical and management skills that are targeted to higher education business administrative professionals.

At the conclusion of this meeting, participants should be able to do the following:

- ✓ Describe the demands placed on CFO's; steps to be taken to meet those demands and roles, skills, and qualities essential for success in today's environment.
- ✓ Demonstrate an understanding of topics related to many economic changes that will impact colleges and universities while interacting with EACUBO Committee Members, higher education vendors and session speakers.
- ✓ Implement best practices in addressing Human Resources related matters.
- ✓ Discuss current issues in accounting, technology, financing and taxes.



The EACUBO 2018 Annual Meeting has been certified to award participants up to 12.5 CPEs in the form of group live presentation. EACUBO strives to provide the best quality programing to all its members and the higher education industry. Should there be a concern with the quality of programing or level of service, please email Stephen A. Schafer, EACUBO's CPE contact, at sschafer@sarahlawrence.edu.



Sunday, October 21

12:00 - 5:00 PM

Registration/Information

Lobby

12:00 - 5:00 PM

Complimentary Buses to Niagara Falls (United States Side)

Transportation: Buses will pick up and drop off at the Lobby entrance of the Buffalo Niagara Convention Center beginning at noon and every half hour until 4:00 PM. The final bus will depart Niagara Falls at 5:00 PM.

Sponsor:

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4:00 - 5:00 PM

Women's Leadership Reception (by invitation only)

Room 108

4:00 - 6:00 PM

Fall Mentoring Session (by invitation only)

Room 101 A

6:30 - 7:00 PM

First-Time Attendee Reception

Pierce Arrow Automobile Museum

Is this your first time attending an EACUBO event? You are not the only one! Come meet other first-time attendees and learn what EACUBO has to offer you and your institution. The Welcome Reception starts at the same Pierce Arrow Museum at 7:00 pm, so you will already be on-site.

Transportation: Buses will depart outside the front entrance of the Buffalo Niagara Convention Center at 6:15 PM

Sunday, October 21

7:00 - 9:00 PM

Welcome Reception

Pierce Arrow Automobile Museum

Go back to the time when EACUBO began!

EACUBO is taking over the Pierce Arrow Museum which is the perfect place to be immersed in a bygone era. Wander exhibits including Stanhope electric carriages, Pierce-Arrow touring cars, a full-sized filling station designed by Frank Lloyd Wright, and the world's only women's hall of fame for transportation.

Get gussied up and have a dilly of a time enjoying period food and drink while listening, and dancing?!, to 1920's era music.

Ssshhhhh.....don't tell anyone about the speakeasy!

Transportation: Buses will pick up and drop off at the Lobby entrance of the Buffalo Niagara Convention Center beginning at 6:45 PM and will continuously loop. The last bus will leave the Convention Center at 8:00 PM. The final bus will leave the Pierce Arrow Automobile Museum at 9:00 PM.

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Deloitte.

KeyBanc
Capital Markets



workday.

Monday, October 22

7:30AM - 5:00 PM

Registration/Information

Lobby

7:30 - 8:30 AM

CFO Breakfast (by invitation only)

Room 101 A

Sponsor:



7:30 - 9:00 AM

Networking Breakfast in the Exhibit Hall (prize drawing)

North Exhibit Hall

Sponsor:



9:00 - 10:15 AM

General Session: Solving Grand Challenges in Education Through Technology

South Exhibit Hall



Vivek Wadhwa

Vivek Wadhwa is a Distinguished Fellow at Harvard Law School and Carnegie Mellon University's College of Engineering at Silicon Valley.

Vivek Wadhwa leads you through a fast pace and engaging discussion about technology and how it helps solve education challenges that were once left to government and large corporations. Advancing technologies in robotics, artificial intelligence, computing, synthetic biology, 3D printing, medicine, and nanomaterials will also disrupt industries and create many new policy, law, and ethics issues.

Sponsor:



Grant Thornton

10:25 - 11:25 AM Concurrent Sessions

Accounting Update- A Three-Year Look Ahead

Room 101 CF

Jean Close, *Bonadio & Co., LLP*

Kelly Thompson, *Bonadio & Co., LLP*

The next three years will bring about many significant accounting changes for colleges and universities. Institutions will be faced with many new accounting standards to implement including new not-for-profit financial reporting requirements, a new revenue recognition model, and lease accounting changes. Experts in each of these areas will delve into the most important aspects that colleges and universities need to know in order to be ready for implementation. This interactive session will include relevant examples for participants to work on and answer throughout the presentation.

Back to the Future: Forecasting Needs to Manage Campus Facilities Risk

Room 101 DE

Jenni Sauer, *Mary Baldwin University*

Joanne Yestramski, *University of Massachusetts, Lowell*

Gayle Perez, *Sightlines*

Presenters will discuss how UMass Lowell worked to develop a comprehensive project inventory of deferred maintenance, is leveraging a data-driven approach to manage financial need pertaining to facilities risk, and has developed a multi-year plan to strategically fund deferred maintenance projects by fully funding depreciation and using a portfolio-based approach.

Monday, October 22

Like a Good Neighbor: Building Relationships While Building Your Campus

Room 106 BC

Stephen Schafer, *Sarah Lawrence College*

Andy Gilburg, *Benchmark Construction*

Marcus Grimm, *Benchmark Construction*

The presentation will address the need for colleges and universities to have strong neighborhood relationships when they are undertaking a building project on campus. The process will be approached from three perspectives:

- Neighbor Perspective - Why is this change happening and how will it impact me during construction and afterward?
- College/University Perspective - What should the College/University do to ensure a smooth project from the neighborhood's perspective?
- Contractor Perspective - How can your contractor can help with this process?

Attendees will walk away with a checklist and suggested courses of action to follow to ease this aspect of the construction process.

Minding the Metrics - What Role Does the Business Office Play to Ensure Realities are Understood, and Critical Decisions are Made?

Room 106 AD

Loren Prescott, *Wilkes University*

Christine Smith, *Baker Tilly*

This session will offer insight on how to comprehensively assess fiscal position and academic success, and specifically will explore how institutions are making tough decisions to meet the disparate equation of more academic success, at lower overall cost. Presenters will highlight how the business officer is vital to facilitating these critical financial decisions and developing an agreed to framework for assessing and communicating key information to institution leadership, including the Board. Presentation will include topics such as fiscal position assessment; impactful metrics to inform strategic, fiscal, and academic decisions; intersection between academic programming, enrollment strategy and financial decisions; developing and incorporating dashboards into existing governance; and driving impactful decisions across the institution.

Sponsor:



Monday, October 22

Succession Planning: Survey of the Field and Updates from the Ground

Room 101 BG

Laura Hubbard, *The State University of New York at Buffalo*

Louis J Mayer, *Stevens Institute of Technology*

Margaret Plympton, *Odgers Berndtson*

Panelists will discuss current practices in succession planning in higher education, featuring both a survey of practices nationally, as well as business officers talking about best practices at their institutions. Audience members will be asked to share their experiences, and there will be plenty of time for sharing lessons learned and talking about the challenges and opportunities of institutional programs in this area, participation from Boards of Trustees, similarities and differences with corporate succession planning, etc.

11:25 AM - 12:15 PM

Networking Lunch

South Exhibit Hall

Sponsor: **M&T Bank**

12:15 - 1:00 PM

Dessert in the Exhibit Hall (prize drawing)

North Exhibit Hall

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where hungry minds gather 

Monday, October 22

1:00 - 2:00 PM **Concurrent Sessions**

A Financially Sound Approach to Achieve Deferred Maintenance and Sustainability Goals

Room 101 DE

Molly Mercer, *Slippery Rock University*

Scott Albert, *Slippery Rock University*

Amir Mohammadi, *Slippery Rock University*

Paul Scanlon, *Slippery Rock University*

This presentation will outline how one university successfully executed a robust energy conservation program that also made a large dent in the deferred maintenance backlog, all while creating a positive impact on the annual budget. Learn how the financial and facilities units at this institution functioned as a seamless, integrated team; through building the business case for this program, using data to generate buy-in from stakeholders, and successfully executing a program that bundled short payback energy savings improvements with an expansive deferred maintenance program. The team will share lessons learned on how to structure the RFP process and how to position the information to stakeholders on campus.

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How Can You Tell Who Has Achieved the Most Efficient Resourcing of Faculty? A Discipline Focused Analysis

Room 101 BG

Tom Eleuterio, *Higher Education Consortia, University of Delaware*

Using data from multiple, consecutive years of the Delaware Cost Study, our benchmarking models identify discipline-specific groups based on a department's use of faculty headcount. Group members in the audience will be able to share their observations about how the specific data envelopment analysis could be used to identify the best path forward towards improvement or to maintain a position of relative optimal efficiency.

Implementing the New Not-For-Profit Financial Statement Presentation

Room 101 CF

Jennifer Mathews, *Stonehill College*

Michelle Spriggs, *CBIZ & MHM New England*

Major changes to the not-for-profit financial statement presentation were finalized with the issuance of FASB's Accounting Standards Update No. 2016-14. Presenters will discuss best practices around implementing the new standard at your organization.

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Proactive Advocacy and Communicating the Value of Higher Education

Room 106 AD

Lynne Schaefer, *University of Maryland, Baltimore County*

Liz Clark, *NACUBO*

Kellee Edmonds, *NACUBO*

Explore the general public's changing attitudes about the relevance of higher education—and the disconnect between higher education leaders and American voters. Understand how student debt and college costs have captured public attention in recent years and how prospective students, families, voters, and lawmakers are responding. Explore tools from NACUBO designed to help business officers tell their institutions' stories and reinvigorate the public understanding of the value of higher education.

Resistance to Change: A Leadership Opportunity

Room 106 BC

Mark Saine, *Client Leadership Development, TIAA*

This workshop focuses on managing resistance to organizational change efforts. Whenever a change is announced, most people will eventually find themselves resisting, in some manner, the change. This session focuses on that resistance and how to overcome the resistance that naturally occurs during times of change.

2:00 - 3:30 PM

Break in the Exhibit Hall with Micro Sessions (~~prize drawing~~)

North Exhibit Hall

See [page 41](#) for Micro Session Descriptions

2:00 - 3:30 PM

Communicating the Value of Higher Education to Families
(by invitation only)

Room 101 A

Monday, October 22

3:30 - 4:30 PM Concurrent Sessions

Are Jim Collins' Ideas Still Relevant for Higher Education Today? How Colleges and Universities Can Go from Good to Great

Room 106 BC

Timothy Bowman, *Harvard, John A. Paulson School of Engineering and Applied Sciences*

Bill Dillon, *NACUBO*

Megan Cluver, *Deloitte Consulting*

Rajiv Shenoy, *Apogee*

The ability of university leadership to achieve the institutional mission continues to be challenged across multiple fronts. In his monograph, *Good to Great and the Social Sectors*, Jim Collins outlines the attributes which differentiate "great leaders" - and provides a framework for great institutions. The panel will examine the enduring principles of Dr. Collins' work and examine how leaders can confront the challenge of leveraging technology as an enabler of institutional greatness --- not a disruption to the institution's mission. Presenters will also explore how these principles relate to an increasingly diverse workforce confronting the need for transformational change.

Higher Education Financing - The Measurement Challenge

Room 106 AD

John Bellardini, *The Sage College*

Christine Gibson, *Juniata College*

Linda Eremita, *George K. Baum & Company*

John Null, *Schneider Downs & Co. Inc.*

Laura Kuffler Macdonald, *S&P Global*

This session will provide an informed perspective on why it is so difficult to measure, and monitor, the financial health of institutions of higher education. The presentation will focus what, when, why and who should possess a solid understanding of actual financial results and trends. Presenters will engage in discussion around educating appropriate parties, including providing examples of communication effectiveness and challenges. This round-table discussion will provide perspective from an underwriter, a chief financial officer, an auditor, and a college trustee. This unique panel will enable attendees to gain clear ideas on what to watch out for, what works for changing course, and the resources required to set in motion strategies to meet financial objectives.

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The Impact of Tax Reform on Colleges & Universities

Room 101 CF

Rebecca Berger, *Massachusetts Institute of Technology*

Jodi Kessler, *Massachusetts Institute of Technology*

Erin Couture, *PricewaterhouseCoopers*

Gwen Spencer, *PricewaterhouseCoopers*

This presentation will provide an overview of provisions that impact colleges and universities including the current status of regulatory guidance and forms. Further, there will be a focus on strategic planning and participants will take away planning points and opportunities to bring back to their university.

Managing and Mitigating Risk through Effective Contracts

Room 101 BG

Coleen (Murphy) Alexander, *Bard College*

Thomas O. Maggs, *Risk Strategies Company*

Frankie (Paulette) Cocoman, *Risk Strategies Company*

Amy Maggs, *Attorney*

This session will cover the following topics:

1. Types of Contracts;
2. Statutory and Common Law Limitations;
3. Indemnity provisions within contract vs insurance policy;
4. Best Practices, including how to keep requirements reasonable and Additional Insured status.

Managing the Change from a Traditional Public Safety Department to a Community Policing One

Room 101 DE

Randy Brashears, *University of Massachusetts, Lowell*

Gerald Schoenle, *State University of New York at Buffalo*

J. Frank Wiley, *University at Albany*

This presentation will highlight the transformation of several Public Safety Departments from a traditional department to a student-centered community policing department. The presentation will cover a host of community policing programs that have transformed the safety of the community and empowered the individual to practice best practices in personal safety, and discuss the pros and cons of outsourcing of non-sworn security. Presenters will outline the collaborative efforts to work with the area municipal police to accomplish university objectives and improve safety both on and around campus.

Monday, October 22

4:30 - 6:00 PM

Happy Hour in the Exhibit Hall

North Exhibit Hall

This networking event includes a variety of appetizer options and beverages. 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 EACUBO 2018 Annual Meeting.

Sponsor:  CliftonLarsonAllen

J.P.Morgan

8:30 - 10:00 PM

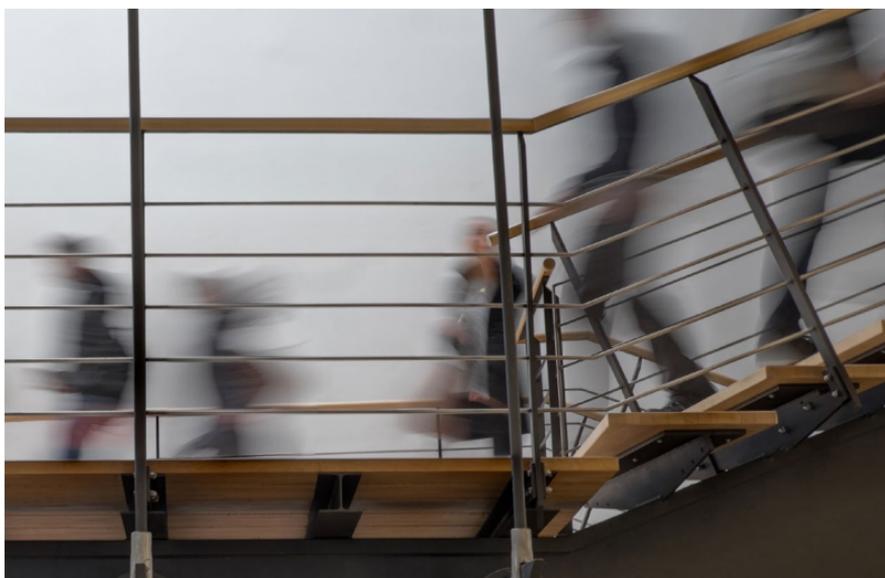
Cheers! Reception

Sungarden Lounge, Hyatt Regency Hotel

Where everyone knows your name! After dinner, gather with your friends and colleagues in the EACUBO "living room" for a sweet bite and a beverage. Comfortable seating and a low-key atmosphere provide a relaxed setting to share what you have learned throughout the program. It's a perfect way to end a very productive and fun day

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CONSTRUCTION™

 NIXON
PEABODY



Tuesday, October 23

7:30 AM - 5:00 PM

Registration/Information

Lobby

7:30 - 9:00 AM

Networking Breakfast in the Exhibit Hall

North Exhibit Hall

Sponsor: **PRAGER & CO., LLC**
INVESTMENT BANKERS

7:30 - 9:00 AM

New to Higher Education Breakfast*

Room 101 A

Romayne Botti, *Carnegie Mellon University*

Maryann Terrana, *NACUBO*

Business officers new to higher education face numerous challenges. If you have worked in higher education for fewer than three years, take this opportunity to connect with colleagues and discuss the complexities of financial management in a college or university environment.

*Limited seating available

9:00 - 10:30 AM

South Exhibit Hall

NACUBO Update

Susan Johnston, *NACUBO*

General Session: Not for the Faint of Heart: Lessons in Courage, Power, and Persistence



Ambassador Wendy Sherman

Ambassador Wendy Sherman engages in a discussion about her service to the country as Under Secretary of State for Political Affairs and her transition to her new role at Harvard Kennedy School as a professor of the practice in public leadership and Director of the School's Center for Public Leadership.

Wendy will share her experience inside the negotiating room and will show how to put values like courage, power, and persistence to work for you in your life and work place.

During Dessert in the Exhibit Hall, Wendy Sherman will have a book signing for her newly released book *Not for the Faint of Heart: Lessons in Courage, Power, and Persistence*.



Sponsor: **J.P.Morgan**

Tuesday, October 23

10:30 - 10:45 AM

Break

Lobby

Sponsor:  **HINCKLEY
ALLEN**

10:45 - 11:45 AM Concurrent Sessions

Charting the Role of Community Colleges in the Future of Higher Education

Room 101 DE

Nicholas Neupauer, *Butler County Community College*

James Hrabosky, *Butler County Community College*

Jolanta Juszkwicz, *American Association of Community Colleges*

Christopher Collins, *Moody's Investors Service*

During this presentation, industry experts will identify best practices and new ideas for navigating a changing higher education landscape. The format will include an overview presentation and guided conversation. Audience participation will be solicited and encouraged, using targeted questions intended to draw out responses from attendees.

CFO First 90 Days

Room 106 BC

Lisa Calise, *University of Massachusetts System*

Michael Howard, *Smith College*

Robert Specter, *The Catholic University of America*

Mark Oster, *Grant Thornton*

First impressions count! The first 90 days of a CFO's tenure are critically important in setting the tone and precedents of the CFO's whole tenure in the role. How much should you listen? How much should you assert goals and values right away? What different approaches should be followed given the financial condition and management that's been inherited?

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INVESTMENT BANKERS SINCE 1928

Financial Planning and Stakeholder Engagement

Room 106 AD

Claire Burlingham, *The University of Vermont*

Alberto Citarella, *The University of Vermont*

David Woodward, *Kaufman Hall & Associates, LLC*

Hear how an institution introduced a financial planning framework that assessed planned capital expenditures and other funding requests against selected criteria for sustainability and risk. The University's director of Budget and Controller collaborated to assemble a shared financial planning process where participants understand why institutional priorities need to be evaluated against resource constraints and why some funding requests need to be postponed or declined. The process is ensuring UVM achieves its mission while prudently managing its resources and risks.

Leading Through a Disaster: Lessons Learned from Hurricane Maria

Room 101 CF

Guillermo Nigaglioni, *University del Sagrado Corazón*

Richard Middaugh, *Dynamic Campus*

Imagine your campus has just experienced a massive natural disaster that goes beyond anything your disaster recovery scenarios could anticipate. How would you handle the situation? In this interactive session, presenters will detail challenges faced in the wake of Hurricane Maria last September, and how they managed to not only re-open campus for the fall semester just three weeks later, but also to launch *Sagrado Contigo* -- "Sagrado With You" -- to deliver aid to students, faculty, staff, and the surrounding communities. This one-of-a-kind account will be incredibly valuable for any institutional leader who has lain awake at night wondering what he or she would do if the unthinkable happened on their campus.

Sexual Harassment Complaints: What Can HR Learn from the Student Side?

Room 101 BG

Jo Ellen Pinkham, *Nazareth College*

Theresa Conroy, *Harter Secrest & Emery LLP*

Julia Green, *Harter Secrest & Emery LLP*

As colleges and universities across the country are faced with an increased number of complaints—very public complaints—of sexual harassment, there is much to learn from how institutions responded to the intense national scrutiny related to student sexual misconduct. In light of the EEOC's requirement that employers have a holistic approach to creating a culture that will prevent harassment (as compared to responding to complaints of harassment), presenters will discuss strategies used on the student side related to leadership and accountability, anti-harassment policies, harassment reporting systems and investigations, and compliance training.

Tuesday, October 23

11:45 AM - 1:15 PM

Lunch and Last Hurrah in the Hall

North Exhibit Hall

11:45 - 1:00 PM

Book Signing : Not for the Faint of Heart: Lessons in Courage, Power, and Persistence

North Exhibit Hall

Ambassador Sherman's newly released book will be available for purchase and she will sign your copy.

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1:15 - 2:15 PM Concurrent Sessions

Cloud Based ERP System Collaboration

Room 101 DE

Mary Jane Russell, *Saint Michael's College*

William Anderson, *Saint Michaels' College*

Saint Michael's College with its partners in the Green Mountain Higher Education Consortium, Champlain and Middlebury Colleges, are implementing a cloud based ERP system for use by all three colleges. The presentation will outline the genesis of the project, its history, and current status. The talk will describe the processes used by GMHEC to determine what services to share, how to standardize related business processes, and the way in which those decisions are reflected in the data governance required for simultaneous implementation of the two systems. The presentation will also highlight the critical role of the project governance model and data governance early in project planning.

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Good Strategy Requires Good Data

Room 106 AD

J. Michael Gower, *Rutgers University*

Paul Friga, *University of North Carolina*

Strategy is all about smart resource allocations. Chief Business Officers (CBOs) in higher education are often charged with reviewing and approving budgets for investment without sufficient data to make comfortable decisions in this space. Join this interactive session where presenters will review the quality of data in higher education - the good, the bad and the ugly, and present case studies of university decision making topics - budgeting, unit evaluation, and tracking strategic initiatives. The discussion will include best practice ideas moving forward.

Putting Finance in the Service of Student Success

Room 101 CF

Celeste Schwartz, *Montgomery County Community College*

Donna Desrochers, *rpk Group*

This session will share current research on capturing ROI from student success initiatives. Participants will learn how this framing and analysis allows institutions to make more strategic investments, support smart reallocation, and enhance transparency and accountability. Case study examples will be provided around new advising models, tech-enabled advising solutions, and competency based education models. Engaged learning will also occur as participants share their ROI approaches in a small group format during the presentation.

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The Power Of Partnership: Meeting Students Where They Are

Room 106 BC

Carla Perez, *Chicago State University*

Betsy Burton-Strunk, *BankMobile*

Judith Flink, *Flywire*

David King, *Flywire*

This presentation shows how a team of providers has leveraged technology to improve student satisfaction, increase cost effectiveness, and gain internal efficiencies in the business office. Hear how the institution provides a blended service model targeting the next generation of students and families.

Sponsor:  **accenture**

Advancing Women's Leadership

Room 101 BG

Lynne Schaefer, *University of Maryland, Baltimore County*

Nicole Truffant, *University of New England*

Susan Whealler Johnston, *NACUBO*

Join a conversation with three seasoned women leaders about opportunities and obstacles women sometimes face as they navigate their careers and lives toward and through leadership positions. Consider with your peers the characteristics and habits that define the best leaders, and how those are developed and nurtured. We will learn about the rising influence of women in all aspects of our lives, as motivation to strive to be the best we can be. We'll ask ourselves what we can do to provide opportunities and support for women coming through the pipeline, to make sure doors are open for them. And, can we have it all? Maybe...

Tuesday, October 23

2:25 - 3:25 PM Concurrent Sessions

Advancing Facilities Operations with Key Metrics

Room 101 DE

Guilbert Brown, *Millersville University*

Sally Grans Korsh, *NACUBO*

Presenters will share four years of APPA/NACUBO survey data submitted from all regions and institutional campus types. Presentation covers key consumption issues; BTU (energy - also called Energy Use Intensity EUI), electrical, water, waste (recycling/garbage), carbon, and how that relationship can lower operational costs. Review how to present data, which can be used by students, staff, faculty, and senior administration for decision-making to improve the campus ecology and footprint. Case studies of other campuses will be presented as to how they have used this data to improve overall consumption and reduce costs.

Building Emotional Resiliency and Cultivating High Performance Leadership

Room 106 AD

Howard Teibel, *Teibel Education Consulting*

Leadership is about orchestrating our people to coordinate actions toward a set of shared outcomes. Our effectiveness as leaders is a function of the moods we can cultivate in our teams and our capacity to effectively use language to make requests, offers, promises, declarations and assess each other's effectiveness. When practiced over time, we can transform our capacity to build a team that has emotional resiliency to navigate the complex work we do on a daily basis. Some of the session principles come from years of research and practice from Dr. Fernando Flores, a leading thinker in the theory of management and conversation of actions.

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Improve Hiring and Development Outcomes Using Data

Room 101 BG

Timothy Bowman, *Harvard, John A. Paulson School of Engineering and Applied Sciences*

Kathleen Teehan, *ClearRock*

This interactive presentation we will introduce a simple framework called the head, heart and briefcase. We will discuss how this approach is used to hire and develop talent, and the impact that this approach has on attrition, employee engagement and workplace productivity. All participants will develop a behavioral job pattern for a key role within their business, and they will learn how to use this data for improved hiring outcomes and employee development.

Maintaining the Endowments Intergenerational Equity in the Current Market Environment

Room 106 BC

David Proulx, *Rhode Island School of Design*

Annette Parker, *Ursinus College*

John Griffith, *Hirtle Callaghan*

The competition for students continues to put pressure on endowments for revenue diversification. Meanwhile, endowment returns have lagged significantly. Presenters will explore the potential solutions for restoring intergenerational equity and debate the importance of maintaining intergenerational equity vs. continued spending to fulfill colleges' and universities' current missions.

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Positioning Your University or College for the Future by Embracing Technology: How to Get Everybody on Board

Room 101 CF

Alan Bowers, *Emerson College*

Courtney Sampson, *Brandeis University*

Secil Watson, *Wells Fargo*

Higher education and banking industries are both service industries and both are being disrupted by new technology startups: banking by FinTech companies, and higher education through online providers. The presentation will go into the convergence between banking and technology and its impacts on college and university treasury offices. Presenters will discuss real life case studies of embracing technology and getting your people onboard.

3:25 - 3:45 PM

Break

Lobby

Tuesday, October 23

3:45 - 5:15 PM

South Exhibit Hall

EACUBO Business Meeting

General Session: Lessons in Diversity, Inclusion and Innovation



Dr. Dan Hocoy, *The State University of New York,
Erie Community College*

SUNY Erie Community College President, Dr. Hocoy, has had a long-standing commitment to creating a campus environment and programs that supports diversity, inclusive excellence, and global perspectives. He has provided innovative and effective academic leadership by focusing on improving student success, developing exciting new programs, and enhancing institutional sustainability. Dr. Hocoy has also been successful in partnering with private and public organizations in creating unique academic programming that serve workforce needs and address current community issues.

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5:15-7:00 PM

Networking Reception

Ballroom

Join your friends and colleagues for this relaxing networking reception. Enjoy hors d'oeuvres and beverages as you continue the conversations from the day's sessions. Share ideas and solutions you have learned over the course of the meeting.

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PARTNERS



Wednesday, October 24

7:30 - 11:30 AM

Registration/Information

Lobby

7:30 - 8:30 AM

Breakfast

Lobby

Sponsor:



Wednesday Morning Program

Technology Transforming Higher Education

Join us for a half day focused on the technology that is transforming higher education today. This themed program will kick off with a keynote address by Susan Grajek, Vice President, Communities and Research at EDUCAUSE. Susan will paint a broad picture of the changing technology landscape in higher education, drawing from EDUCAUSE research publications including Top 10 IT Issues and 2018 Technology Trends. After the keynote, we offer three concurrent sessions that will dive deeper into major areas of interest in technology. The concurrent sessions will repeat so that participants may attend two of the three offerings.

8:30 - 9:30 AM

The Amazonification of Higher Education

South Exhibit Hall

Susan Grajek, *Educause*

The many recent advances in information technology have reshaped products, services, and professions, as well as the way we live our daily lives. Higher education is no exception to the impact of IT, although in many ways our industry has remained relatively insulated. No longer. We are experiencing the Amazonification of higher education, as technology is being used to improve student outcomes, transform teaching, learning, and research, and foster new business models. Learn about the cultural, technological, and workforce shifts that are entailed. Visit the near future through examples of innovations already underway on campuses throughout the nation.

Sponsor:



9:30 - 9:45 AM

Break

Lobby

Sponsor: **Morgan Stanley**

Wednesday, October 24

9:45 - 10:40 AM Concurrent Sessions

Artificial Intelligence and Building a Smarter University

Room 101 BG

Bruce Gardner, *IBM*

Higher education as an industry is at a crossroads where colleges and universities must become cognitive institutions in order to remain viable in the coming decade. Those that don't are at significant risk of becoming obsolete. In this session you will hear the IBM point of view on the importance of being a cognitive campus. Bruce Gardner will share a roadmap of the steps to take and programs to implement that will achieve this status. University colleagues will join the discussion to share their experiences in becoming more cognitive.

Building the 360 Degree View on the Student

Room 101 CF

Michael Cipriano, *University of Massachusetts, Lowell*

Joanne Yestramski, *University of Massachusetts, Lowell*

Sam Chung, *SalesForce*

Using the Salesforce Connected Campus framework, UMass Lowell addressed the challenge of tracking a student's interactions from recruiting, through matriculation, and then post-graduation by deploying a Customer Relationship Management system (CRM), where the Student is the Customer. The CBO and CIO will share insights from this effort to incrementally build a single salesforce database on the new Higher Ed Data Architecture (HEDA) form.

Sponsor: **accenture**

Current Topics in Data Privacy

Room 101 DE

Jack Suess, *University of Maryland, Baltimore County*

Michael Cooney, *Nixon Peabody*

Jenny Holmes, *Nixon Peabody*

The recent go-live of European Union's General Data Protection Regulation (GDPR) has resulted in many institutions reviewing their privacy protections and flooded our inbox with services updating their privacy policies. Is privacy an emerging issue and, if so, what should our institutions be doing to prepare for this? This panel will discuss the topic and offer tangible next steps on moving forward.

10:40 - 11:00 AM

Break

Lobby

11:00 - 11:55 AM Concurrent Sessions

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EXHIBIT HALL SCHEDULE

Make sure you visit the Exhibit Hall during the hours below to connect with your current vendors, cultivate and develop new relationships with EACUBO's corporate partners. Search for solutions to current challenges, and perhaps select your next service provider. Nearly 80 companies are looking forward to meeting you.

You will also be given the opportunity to win great prizes! Exhibitors will give you a ticket when you visit their booths. Write your name on the back of each ticket and drop it into the prize-drawing box located in the 600 aisle of the Exhibit Hall. Be sure to stop by all the exhibitor booths. The more tickets you receive, the more chances you have to win! Attendees must be present to win. Drawing open to institutional attendees only

Each prize-drawing listed will offer the chance to win a \$50 gift card.

Monday, October 22

- 7:30 - 9:00 AM Networking Breakfast (Prize Drawing)
- 11:25 AM - 12:15 PM Networking Lunch
- 12:15 - 1:00 PM Dessert (Prize Drawing)
- 2:00 - 3:30 PM Break with Micro Sessions

Micro Sessions

- 2:00 - 2:15 PM CTM Visitor Revenue: will reveal how 75 colleges and universities filled dozens of budget holes with over \$1 million in overlooked, unclaimed dollars. If quarterly checks without cost, risk or additional staff workload is intriguing to you, this 15 minute micro session will answer your questions.



- 2:25 - 2:40 PM HelioCampus: Join for a brief presentation and learn about how we are helping colleges and universities use analytics to increase enrollment, improve student success, ensure financial sustainability and accelerate gift giving. In this session we'll share more about our model and approach, as well as provide an overview of how we are working with other EACUBO members Ithaca College & UMass Lowell.
- 2:50 - 3:05 PM Aircuity: John Zurn from the University of Pennsylvania will highlight their success deploying bond financing to deliver deep energy retrofits and how Penn applied this strategy to reduce the largest energy component of their most expensive lab buildings. Learn why Penn implemented Aircuity's demand control solution to significantly reduce deferred maintenance backlog while improving the IEQ.
- 3:15 - 3:30 PM Pearson: Learn how Inclusive Access models deliver day one access to required learning materials for all students at up to 70% off the price of print materials. We're partnering with institutions leveraging this model to measure its impact on both cost savings, student performance, improved retention while strengthening the role of the campus store.
- 4:30 - 6:00 PM Happy Hour

Tuesday, October 23

- 7:30 - 9:00 AM Networking Breakfast (Prize Drawing)
- 11:45 AM - 1:15 PM Lunch and Last Hurrah in the Hall (Prize Drawing)
- 11:45 AM - 1:00 PM Book Signing

Don't forget to get your signed copy of Not for the Faint of Heart: Lessons in Courage, Power, and Persistence by Wendy Sherman



EXHIBITORS LISTING

Company	Booth
ABM	301
AE7 Architects & Planners	605
Aircuity, Inc	321
Allianz Global Assistance	509
Ambassador Education Solutions	303
American Dining Creations	311
Anaplan	623
Apogee	402
Aramark	407
BankMobile	310
Barnes & Noble College	202
BBL Campus Facilities	211
BKD CPAs & Advisors	312
Blackboard	601
BlackLine	714
Bonadio Group	718
Brown Advisory	508
C&S Companies	204
Calpine Energy Solutions	218
CBIZ	519
Chartwells Higher Education Dining Services	512
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Mason Investment Advisory Services, Inc	216
Metz Culinary Management	607
NACUBO	621
Nelnet Campus Commerce	409
NSM Insurance Group	608
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