

CONCURRENT SESSIONS AT A GLANCE

SUNDAY, SEPTEMBER 25, 2022

Concurrent Sessions #1	Beyond borders: compliance, controls, costs, & challenges of a changing workforce	Program Planning: Connecting the Dots between Finance, Marketing, Admissions & Academic Leadership	Responsible Investing (RI)	
Concurrent Sessions #2	TIAA's People Equity Index: Enabling Individual & Enterprise Accountability	Supporting Student Success & Future-Focused Experiences with Data-Driven Innovation	Constituency Concurrent Sessions	
Concurrent Sessions #3	Cyber Risk Continuum: Evaluating Going Bare to Fully Insured	Best Practices Award Winner - TBD	A different approach for dynamic, innovative, & flexible strategic planning	Test Optional Awarding to Drive Enrollment & Revenue

MONDAY, SEPTEMBER 26, 2022

Concurrent Sessions #4	Telling your Financial Story - Communicating Financial Information Effectively	Communicating Ethical Standards & Upgrading Fraud Detection Processes in Modern Times	Workforce Management for Auxiliary Services on your Campus	Best Practices Award Winner - TBD
Concurrent Sessions #5	Improving Cashflow through Academic Operations	Retire Inequality: Financial Wellness for All	Designing a Culture of Continuous Transformation	Managing & Controlling the Risks of Your Purchasing Card Program

TUESDAY, SEPTEMBER 27, 2022

Concurrent Sessions #6	FASB Update	GASB 96, Subscription-Based Information Technology Arrangements	The Generational Puzzle: Updating Your People Strategy for Today's Changing Workplace	Balance Sheet Management in a Rising Rate Environment
Concurrent Sessions #7	Defending against today's newest cyber threats	Creating a Path to Financial Sustainability	Is the Public Bond Market available for my University?	Optimizing Benchmarking Data in College Business Offices and Beyond

CONCURRENT SESSIONS DESCRIPTIONS

SUNDAY, SEPTEMBER 25, 2022

SESSION #	TOPIC	SESSION DESCRIPTION
Concurrent Sessions #1		
101-A	Beyond borders: compliance, controls, costs, & challenges of a changing workforce	<p>COVID-19 and “The Great Resignation” have resulted in a “new normal” work environment and challenged us to rethink how we work, where we work and who we work with across all industries, especially higher education. In this engaging session, we will discuss various topics connected with the changing higher education work environment, including the current employment market and talent acquisition and retention strategies, as well as institutional risks to consider and key controls that ensure a strong control structure. Additionally, we will take a deep dive into the increasing remote workforce trends as college and university employees desire to work and stay with the same institution but live elsewhere. Here, we will discuss issues (compliance, development of policy, etc.) and costs for institutions that are considering allowing their employees to work remotely in other states. Our session will also present one university that took a close look at these evolving workplace trends and implemented significant changes to align their operations with employee expectations.</p>
101-B	Program Planning: Connecting the Dots between Finance, Marketing, Admissions & Academic Leadership	<p>When it comes to financial planning for new and existing degree programs, many institutions struggle to set enrollment goals, scaling faculty resources to meet changing demand, and budgeting for program needs. This presentation demonstrates how Logan University brought together data from finance, marketing, admissions and IR to build a predictive model for program enrollment and direct program costs. Leveraging Anaplan, Logan was able to connect the dots between each departments data to build a model and proforma P&L that drives the University budget process for each program at the University as well as new programs the University plans to launch.</p>
101-C	Responsible Investing (RI)	<p>Jargon around Responsible Investing (RI) “SRI, ESG, DEI, Sustainability” abounds. University stakeholders, including students, alumni, faculty, and local communities, are increasingly asking for higher education administrators to act – including with endowments. In this session, PNC Bank’s Head of RI, Nick Ashburn and Marty Mickey, VP of Finance, National Louis University will discuss actionable steps to define, implement, and measure RI in your portfolio.</p>

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SESSION #	TOPIC	SESSION DESCRIPTION
Concurrent Sessions #2		
103-A	TIAA's People Equity Index: Enabling Individual & Enterprise Accountability	The TIAA People Equity Index is a leadership tool that helps leaders better understand the level of equity of experience within their span of control, enabling them to be more inclusive leaders. The Equity Index brings our data together to create both enterprise and individual accountability for ID&E. This session will help higher ed leaders explore what an equity index is and if it is right for your institution.
103-B	Supporting Student Success & Future-Focused Experiences with Data-Driven Innovation	Backed by data and insights, colleges and universities nationwide are implementing innovative solutions to support student success, reinforce their brand, and bolster recruitment and retention efforts. In this presentation, representatives from Barnes & Noble College and campus partners will share the latest research on student behaviors, preferences and concerns. The conversation will highlight how these insights have translated into refreshed academic and retail experiences, including new course material programs that support improved student preparation and performance in class. Presenters also will discuss retail tactics and solutions that take a reimagined approach to store design, operations, merchandising and more.
103-C	Consistency Concurrent Session - Community Colleges	Constituency discussion for Community Colleges. Come meet with your peers to discuss key industry issues.
103-C	Consistency Concurrent Session – Small Institutions	Constituency discussion for Small Institutions. Come meet with your peers to discuss key industry issues.
103-D	Consistency Concurrent Session – Comprehensive Doctoral & Research Institutions	Constituency discussion for Comprehensive Doctoral and Research Institutions. Come meet with your peers to discuss key industry issues.

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Concurrent Sessions #3		
104-A	Cyber Risk Continuum: Evaluating Going Bare to Fully Insured	<p>In this session we will evaluate where an institution falls on the cyber risk continuum and what that means. For institutions that are questioning whether to buy coverage, we will discuss how to evaluate the limit to premium ratio, what it means to “go bare”, how to prepare for a cyber-breach without coverage, and carrier provided services vs. university contracted services.</p> <p>A 4th learning objective is to: Learn to compare important coverages and services provided through insurance carriers and brokers</p> <p>This session will bring together a broker with insight to higher education coverage placement and market capacity with a risk/cyber liability consultant and a higher education risk manager to encompass all of the moving parts that come with the cyber liability marketplace today.</p> <p>The session is intended to be interactive presented as a TED-style talk Lecture with Q&A throughout.</p>
104-B	Best Practices Award Winner - TBD	
104-C	A different approach for dynamic, innovative and flexible strategic planning	<p>Strategic plans, over time, often fall flat for a variety of reasons. They are developed with enthusiasm and aspiration but fall short during years-long duration. Iowa State University recently chose to take a different approach to long-range strategic planning to create a more dynamic plan fostering innovative and flexible ideas. This presentation will provide an overview and details about the unique approach, describe how the institution carried out the strategic planning project, and include lessons learned that other institutions can leverage in their strategic planning efforts.</p>
104-D	Test Optional Awarding to Drive Enrollment and Revenue – Assessing the Options Through Predictive Analytics and Marketplace Analysis	<p>Dr. Blake Bedsole, Associate Vice President for Enrollment Management & Student Success at Arkansas Tech University and Erin Thompson of SightLine will present on the decision-making framework they used to assess the competitive marketplace and regional benchmarking, develop a predictive enrollment model, and create hundreds of what-if-scenarios for award structures to increase enrollment and net revenue. All steps of this framework were considered to create a cohesive scholarship awarding structure that supports the University brand and strategic initiatives through test optional merit awards, creating need-based awards to support low-income families, and supplemental awards that support important student segments.</p>

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SESSION #	TOPIC	SESSION DESCRIPTION
Concurrent Sessions #4		
202-A	Telling your Financial Story - Communicating Financial Information Effectively	This session reviews how to best communicate your institution's financial story. A national, campus, and GAAP perspective will review observations, insights, and recommendations for effectively communicating financial information via audited financial statements while complying with GAAP. Topics include governing board designations, streamlining disclosures, communicating operating performance, liquidity, restrictions, availability, and use of resources, and investment and endowment information.
202-B	Communicating Ethical Standards and Upgrading Fraud Detection Processes in Modern Times	With the changing landscapes in higher education and organizations moving to hybrid work arrangements, we must not lose sight of the powerful purchasing card. While the card is an amazing tool for convenience and expedited purchasing needs, unchecked, it can have devastating consequences. Developing a process that not only reviews all card transactions, but also educates users that all card transactions are reviewed, will help our institutions stay out of the nightly leading news story (except on those occasions where we want to be headline news for our educational breakthroughs or national championships).
202-C	Workforce Management for Auxiliary Services on your Campus	<p>From campus food services, convenience stores, residence halls, bookstores, concessions, and a wide range of other facilities, higher education auxiliary services play a valuable role in delivering goods and services to students, faculty, and staff. Providing excellent customer service and employing large numbers of student workers are priorities for auxiliary services while also operating as self-supporting businesses.</p> <p>Effectively managing a workforce of hourly and student workers has inherent challenges. Learn how to successfully navigate those challenges while keeping your workforce happy and engaged.</p>
202-D	Best Practices Award Winner - TBD	

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SESSION #	TOPIC	SESSION DESCRIPTION
Concurrent Sessions #5		
203-A	Improving Cashflow through Academic Operations	<p>Allowing the annual budget to set the direction of the university is the proverbial tail wagging the dog. The budget is only as successful as the long-term financial model of the institution. To drive change in the institution's financial sustainability, obtaining relevant and actionable data is critical to the process. When university leadership has the right information, they can make data-informed decisions on the operations of their academic model. Utilizing a robust, data-rich solution that provides a visual presentation will help foster consensus and collaboration around the right data.</p>
203-B	Retire Inequality: Financial Wellness for All	<p>Employers are using a variety of means to carry diversity, equity and inclusion into the benefits they offer. A one-size-fits-all approach to employee communication is giving way to a nuanced approach that can account for varying needs of employees at different life stages and financial situations, who also may have been impacted by the pandemic in different ways. In Q4 2020, 28% of employers surveyed said they would be reviewing benefits offered versus those used, and 20% said they would consider offering employees a wider range of ancillary services.</p> <p>Plan Sponsors have a strong focus on ensuring that their employees take full advantage of their retirement plans. We will discuss ways that Higher Ed Leaders can use key insights and tailored strategies to ensure Financial Wellness for ALL employees.</p>
203-C	Designing a Culture of Continuous Transformation	<p>This interactive session will focus on how institutions can pair continuous transformation with a strong business model. It will include a three-part assessment that asks participants to consider their institution's financial sustainability, looking at viability, financial pitfalls, and major points of risk. Second, participants will rate their institution's willingness to change, assessment of its ability to change, and resources available to accomplish a sustainable way forward. Third, participants will consider ways to execute strategies in a continuous model that includes a tactical deployment of resources and a prioritization of programs so that the end result is a strong, sustainable business model.</p>
203-D	Managing and Controlling the Risks of Your Purchasing Card Program	<p>Many colleges and universities have implemented a P-Card program but have yet to establish a strong control environment to monitor card administration and/or purchasing activity. The risk of fraud, waste and abuse of the cards can be high. However, implementing proper internal controls can help mitigate these risks. Our presentation will outline common pitfalls of P-Card programs and how enhanced controls/management can reduce the risk of fraud and provide additional insight into expenditure activity.</p>

CONCURRENT SESSIONS DESCRIPTIONS

TUESDAY, SEPTEMBER 27, 2022

SESSION #	TOPIC	SESSION DESCRIPTION
Concurrent Sessions #6		
301-A	FASB Update	Annual update on new and upcoming FASB Standards.
301-B	GASB 96, Subscription-Based Information Technology Arrangements	As the dust settles on the implementation of GASB 87, Leases, a similar standard is on the horizon that applies similar accounting to Subscription-Based Information Technology Arrangements. In this presentation we will review the requirements of GASB 96 and highlight the similarities and differences from GASB 87. We will also take a deep dive into the implementation efforts at Michigan State University, including the University's approach to identify these arrangements and the software option that will be utilized for the accounting calculations. We will wrap up with a review industry-wide considerations for Universities to keep in mind as they implement this new standard based on Plante Moran's interactions with their broad client base.
301-C	The Generational Puzzle: Updating Your People Strategy for Today's Changing Workplace	Employers should be looking to build a better workplace — one that attracts, engages and retains top talent at the right cost. The first step is to assess your Institution's total rewards program to employees, in an effort to address staff and faculty engagement through education and enhancement of employee perceptions surrounding rewards. Numerous factors are causing the nature of work to change. Now more than ever, it is important that HR professionals recognize the incredible opportunity to position their organizations to attract and retain talent.
301-D	Balance Sheet Management in a Rising Rate Environment	<p>Following a period of unprecedented monetary stimulus and historically low rates, enacted to combat the economic headwinds of the COVID pandemic, the Federal Reserve is now facing inflationary pressures putting them on accelerated path to increasing rates. Higher Education institutions looking to preserve capital and position their portfolios for opportunities in a rising-rate environment will need to adapt to the changing marketplace by reassessing past asset and liability management strategies. Institutions are managing multiple objectives in the face of market volatility, including meeting target returns and spending policies, managing short-term liquidity, and completing strategic campus investments. Similarly, institutions are revisiting their capital structures to identify opportunities to deploy incremental leverage or engage cost savings through refinance.</p> <p>"Balance Sheet Management in a Rising Rate Environment" will examine the impact of rising interest rates to both assets and liabilities and highlight tactics spanning from capital preservation to return enhancement. Institutions will learn strategies on how to optimize their balance sheets in the face of these changes, allowing them to proactively address risk and capitalize on opportunities.</p>

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Concurrent Sessions #7		
304-A	Defending against today's newest cyber threats	2021 saw a significant amount of change in the cybersecurity threat landscape for colleges and universities, and many institutions found that the security controls that had protected their networks for years suddenly were failing to stop attacks. In this session attendees will hear war stories of real-world incidents showing how cyber threat groups have advanced their tactics and attack techniques in the last year. The presentation will describe the unique security disclosures and other events in 2021 that helped give rise to these new attacks and will provide an overview of the most effective new and emerging IT security controls organizations are implementing to prevent these new attacks.
304-B	Creating a Path to Financial Sustainability	Do you understand the size of your institution's future financial gap? Are you looking for a path to financial sustainability? During this session we will discuss the state of higher education and seek to understand what is causing the stress so many colleges and universities are experiencing today. A case study will be presented, which examines how a private institution sized their financial gap, understood the financial performance of their programs, and created a path forward.
304-C	Is the Public Bond Market available for my University?	Many colleges and universities have never accessed the public capital markets, believing that it would be difficult or impossible to do so due to their enrollment size, balance sheet resources or other metrics. These institutions often only finance their capital needs with bank debt and foregoing lower interest rates and/or more flexible covenants that may be available with a public offering. Additionally, it may be possible to obtain a superior financing structure using a "hybrid" approach of both public bonds and bank loans.
304-D	Optimizing Benchmarking Data in College Business Offices and Beyond	Session features a presentation by Director of Analytics and Research Operations, Matthew Harris, and Chief Research and Governmental Affairs Officer, Matthew Simpson. Speakers will present their experience with the NHEBI benchmarking platform, the data collection process, and the integration of benchmarking in decision-making campus wide. Speakers will present their experience specific to the Cost and Productivity benchmarking module and how it has influenced decision-making in the business office and beyond. After the presentation and demonstration of the benchmarking platform, there will be an opportunity to ask questions and share ideas.