

CACUBO 2023 ANNUAL CONFERENCE CONCURRENT SESSIONS

**Click on the concurrent session for the full slide deck.*

SUNDAY, OCTOBER 1, 2023

Concurrent Sessions #1 8:45AM-9:45AM	100-A: The Great Resignation	100-B: Student Enrollment in Turbulent Times	100-C: Forging Pathways to Employ a Neurodiverse Workforce	
Concurrent Sessions #2 10:00AM-10:50AM	101-A: Getting Work Done Together: The 6 Types of Working Genius	101-B: Educating Meets Regulating: Compliance & Employee Care Go Hand in Hand	101-C: Data Analytics: Where do we go next?	
Concurrent Sessions #3 2:30PM-3:30PM	103-A: Will Bowen Super Concurrent	103-B: Tuition Discounting for Publics: What is Changing and Why?		
Concurrent Sessions #4 4:30PM-5:30PM	104-A: Reducing Bias and Boosting Performance through Diversity, Equity and Inclusion	104-B: Sustainable Energy Reduction through Physical Plant Initiatives	104-C: How One Campus Saved University of Nebraska Students \$9M in Textbook Costs	104-D: GLBA, Ransomware & Other Information Security Issues in Higher Education

MONDAY, OCTOBER 2, 2023

Concurrent Sessions #5 11:00AM-Noon	202-A: Cyber Resiliency	202-B: GASB Statement No. 101 - Compensated Absences: What Institutions Need to Know	202-C: FASB Update	202-D: Best Practices
Concurrent Sessions #6 1:15PM-2:15PM	203-A: From Analysis to Decision: Emporia's State's Strategic Financial Planning Process	203-B: Fiscal Resiliency: Exploring Creative Solutions for Campus Challenges	203-C: Align Your Rewards Strategy	203-D: People Equity Index

TUESDAY, OCTOBER 3, 2023

Concurrent Sessions #7 11:00AM-Noon	302-A: Faces of Fraud: How to Stay Safe From the Latest Threats	302-B: What is Keeping Insurers Up at Night? The Realities of the Higher Education Insurance		
Concurrent Sessions #8 1:30PM-2:30PM	303-A: Long-Term Capital Planning in a Rising Rate Environment	303-B: The Threat Assessment Team: A Key Factor in Keeping Your Campus Safe	303-C: Building Your Yellow Brick Road	303-D: Chart of Accounts Considerations - Is it time to rebuild?

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SUNDAY, OCTOBER 1, 2023

SESSION #	TOPIC / PRESENTER(S)	SESSION DESCRIPTION
Concurrent Sessions #1		
100-A	The Great Resignation (Sarah Loghin)	The Great Resignation has hit Higher Education hard in the accounting and finance departments. This presentation will provide practical tips for integrating succession planning in your routine processes, to safeguard your institution from loss of productivity and institutional knowledge during a personnel transition.
100-B	Student Enrollment in Turbulent Times (Leah Lindstrom, CPA & Andreia Nebel, Ed.D., PT., DPT., FNAP & Carla Dirkschneider, MS, RHIA & Jennifer Wilson, M.S.)	Higher Education institutions are operating in an environment in which it has become increasingly important to rethink recruitment and retention efforts to achieve sustainable levels of enrollment. During this presentation we will hear the firsthand experience of Clarkson College. The Director of Healthcare Business, Student Success Administrator, and Vice President of Academic Affairs will share about their institution's recent enrollment project and what they have done to do a complete review of enrollment and recruitment practices. During the presentation we will also consider how a better understanding of program profitability can inform recruitment and retention efforts.
100-C:	Forging Pathways to Employ a Neurodiverse Workforce (Marty Mickey, Danielle Meadows, Karen Krainz Edison)	Universities have been the forefront of inclusion for years, bringing students from all backgrounds to campus and creating a new home. DE&I has many facets, one being neurodiversity. People with disabilities are often forgotten due to their different abilities and the resources needed to support them. Universities have begun programs to welcome a neurodiverse student body to their campuses and companies have sought them out for employment based on their skills. This panel will bring higher education and business leaders together to discuss how they have brought neurodiversity into their organizations and how it made a sustainable and measurable impact.
Concurrent Sessions #2		
101-A	Getting Work Done Together: The 6 Types of Working Genius (Robert Martens)	Moving into a new role is intimidating, and moving into a leadership role may be more so. No matter what else is going on, the work needing to be done and the complexity of those projects continue to increase. As such, it is imperative to find a way to work together to get the work done. The 6 Types of Working Genius is the Table Group's attempt to help teams organize their work to help keep people energized and to keep things moving forward.

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SUNDAY, OCTOBER 1, 2023

SESSION #	TOPIC / PRESENTER(S)	SESSION DESCRIPTION
Concurrent Sessions #2 (continued)		
101-B	Educating Meets Regulating: Compliance & Employee Care Go Hand in Hand (Edward Phillips & Tony Denardo)	Delivering regulation in education is a 3-pillar effort. Policies need to be agreed upon across multiple departments/schools. Communicating that policy needs to be consistent and encompassing any possible reasons for deviating from the policy. Users need to be convinced that their adoption is good for the entire institution, while auditing is the way to measure success. Hear from Michigan State University on their journey to determine best user experience, policy adoption (and agreement), providing Duty of Care, audit thresholds, adopting AI and ML, and more.
101-C	Data Analytics: Where do we go next? (Jimmy Barnes & Russ Hannah)	Technology is advancing at a rapid rate. Massive amounts of data are being generated, stored, used, and analyzed. Business Officers are no longer charged with routine tasks and processes but expected to understand data"- how it is created, collected, stored, accessed, and used. Business Officers and other higher education professionals must be able to adequately safeguard this data as well as work with it, think critically about the story it is telling, and use it to make better decisions. Thus, it is critical that all individuals in higher education become comfortable with large data sets and various technologies. In this presentation we will discuss how an institution could begin and/or improve their analytic journey. This would include an understanding of how to identify areas to analyze, how to collaborate across departmental units, analytic processes, or tools to use and how to report findings.
Concurrent Sessions #3		
103-A	Will Bowen Super Concurrent	Continue the conversation on how to develop a "Complaint Free World" with general session speaker Will Bowen.
103-B	Tuition Discounting for Publics: What is Changing and Why? (Chris Leach & Shea Bryant)	This presentation provides an overview of tuition discounting for public institutions. Among the topics covered: 1) What tuition discounting for publics is and how it differs from what private institution do, 2) Why NACUBO felt the need to update and modify its guidance on discounting, 3) What the new guidance recommends, 4) How you can implement the new guidance at your institution.

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Concurrent Sessions #4		
104-A	Reducing Bias and Boosting Performance through Diversity, Equity and Inclusion (Tamika Mitchell, Bianca Sarrach & Tricia Bagsby)	Workforce diversity, equity and inclusion (DEI) has become an area of focus for many organizations. Studies have shown that diverse and inclusive organizations outperform their competition financially and yield more productive environment. We will share how to identify systems of exclusion and explain how making DEI a part of an Institution's strategic plan can improve overall performance and student engagement.
104-B	Sustainable Energy Reduction through Physical Plant Initiatives (Jennifer Garrison, Warren Whitesell, & Chris Hoffa)	<p>DePauw University completed a Campus Energy Master Plan (CEMP) in June 2021. The CEMP consisted of multiple large-scale projects that targeted sustainable energy reduction. Project objectives included:</p> <ul style="list-style-type: none"> - Annual utility energy savings - \$780,000 - Annual maintenance savings - \$70,000 - Total deferred maintenance reduction - \$5,000,000 - Annual greenhouse gas emission reduction - \$7,400 metric tons <p>A joint team from Facilities Management and the Finance Office have developed an internal methodology for monitoring the performance of CEMP and for future budgeting purposes. We will describe the successes and challenges of this analysis in the current volatile utility environment. The presentation will also discuss considerations for the project contracts, including engineering, procurement, and construction management capabilities.</p>
104-C	How One Campus Saved University of Nebraska Students \$9M in Textbook Costs (Brad Severa & Geogia Brodsky)	The Inclusive Access program at the University of Nebraska-Lincoln (UNL) launched in 2019 with the goal of increasing affordability and access to course materials. The program -- Successful Teaching with Affordable Resources (STAR) -- has saved students an estimated \$9.3 million, compared to the cost of new course materials, and replaced over 150,000 textbooks with affordable content. UNL expanded the program to Equitable Access last semester, ensuring all students across disciplines and majors receive instant access to materials on or before the first day of class. Brad Severa, UNL's academic technology expert, has been a critical on-campus advocate for UNL's STAR program, as well as their Open Educational Resources (OER) initiative. Severa will share findings from the university's first semester of Equitable Access, highlighting best practices for launching a program that bolsters academic freedom and meets students' needs.
104-D	GLBA, Ransomware & Other Information Security Issues in Higher Education (Johnny Sanders)	Our presentation will address the changing requirements of the Gramm-Leach-Bliley Act (GLBA) and how this affects security, and Title IV funds in higher education. We will address the major trend of ransomware attacks, other relevant breach data, and what institution leaders must do to better secure critical data, and the data of their students. In addition, we will cover not only the GLBA requirement to construct an incident response plan, we provide real world evidence proving that institutions could save millions of dollars value of having these plans in place.

CACUBO 2023 ANNUAL CONFERENCE CONCURRENT SESSIONS

MONDAY, OCTOBER 2, 2023

SESSION #	TOPIC / PRESENTER(S)	SESSION DESCRIPTION
Concurrent Sessions #5		
202-A	Cyber Resiliency (Ron Ritenour)	Universities tend to be very large, open, and flat IT architectures that include a highly transient, variable population of users. These environments often promote a wide array of technologies that generate a tremendous amount of data, much of it protected and governed by regulation. Although many schools have implemented traditional and more conventional security measures, few are positioned to maintain the university's mission during a more sophisticated cyber-attack like ransomware. This presentation will define what cyber resiliency means to higher education and discuss maintaining a balance between cyber resiliency and educational integrity. University administrators, CIO's and CISO's will gain a better understanding of how to anticipate, withstand, recover from and adapt to cyber related challenges through proactive cyber continuity practices, better informed incident response, and intelligent recovery methods that will protect and promote the student experience.
202-B	GASB Statement No. 101 - Compensated Absences: What Institutions Need to Know (Shea Bryant & Katie Thornton)	We will begin with a deep dive into the requirements of GASB No. 101, Compensated Absences, and some general thoughts on the impacts to the Higher Education industry. This will include flow charts and graphics where possible to make the information more digestible, as well as real world examples from Plante Moran's client base. We will then walk through the implementation efforts at Michigan State University, the projected impacts to reporting, and the communications that will be necessary with the board and executives. This will include discussion on the changes in the University's processes and anticipated additional costs needed to implement the new standard. We will then leave participants with some recommendations for next steps as they work through their own implementation journeys. This will include thoughts on the industry, as well as building on some of Michigan State's identified next steps.
202-C	FASB Update (Chester Moyer, CPA & Corey Robinson, CPA)	Participants will hear about current and upcoming FASB standards and will hear about lessons learned on implementation of recent standards. Participants will work through examples of upcoming standards.
202-D	Best Practices	Best Practice Awards are presented.

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MONDAY, OCTOBER 2, 2023

SESSION #	TOPIC / PRESENTER(S)	SESSION DESCRIPTION
Concurrent Sessions #6		
203-A	From Analysis to Decision: Emporia State's Strategic Financial Planning Process (Diana Kuhlmann, Angela Wolgram, & Justin Martin)	With inflation increasing the cost of capital and operating expenses, understanding the long-term financial impact of initiatives is a key step in the planning process. Making the best decision requires the evaluation of internal and external factors, and modeling and comparing multiple scenarios to identify the best approach and help secure internal consensus. In this session, financial leaders at Emporia State University will discuss how they leveraged long-term financial planning capabilities to evaluate factors, such as academic programming, capital funding sources and cash flow impact, to determine the go-forward plan to construct a new nursing building.
203-B	Fiscal Resiliency: Exploring Creative Solutions for Campus Challenges (Rebekah Martin & Karen Gries & Linda Scholting)	During this interactive discussion, attendees will explore the current financial challenges facing many higher education institutions with declining enrollment, rising costs and excess capacity within their facilities. The audience will learn how peer colleges and universities are addressing these challenges with both traditional and creative approaches, including leveraging public/private partnerships, designing cost containment measures and more.
203-C	Align Your Rewards Strategy (Nichole Johnson)	From a financial standpoint, we'll discuss healthcare trend and cost control methods for the future. Medical and prescription drugs prices are on the rise and have been intensified by consumer behavior in the pandemic. We'll review considerations that can have a great impact on your bottom line.
203-D	People Equity Index (Der Vang, Dan Han & Mark Olsen)	In recent years, virtually all companies and organizations have put emphasis on working towards DEI. A culture that values employees and supports their job satisfaction and professional development in undoubtedly one that can attract, retain top talent- two things that are invaluable to the long-term success of any business. Learn how three organizations have implemented programs focused on evaluating internal procedures, and third - party providers. Implicit biases can hinder disadvantaged groups in ways that may not be obvious when outcomes like performance ratings or hiring patterns are viewed in isolation. When six key measures of equity are aggregated into one score the results are enlightening and convincing.

CACUBO 2023 ANNUAL CONFERENCE CONCURRENT SESSIONS

TUESDAY, OCTOBER 3, 2023

SESSION #	TOPIC / PRESENTER(S)	SESSION DESCRIPTION
Concurrent Sessions #7		
302-A	Faces of Fraud: How to Stay Safe From the Latest Threats (Jeff Lanza)	This dynamic presentation focuses on how criminals try to trick us, steal our identities and commit fraud. It demonstrates the simple steps we can employ to keep our identities safe and stay protected from the most common scams and frauds that pervade our society. Jeff provides easy to implement solutions to current real-world risks. Jeff provides quality advice for advisors and their clients to stay safe from fraud along with specific tips and recommendations. Jeff explains the risks and provides the appropriate solutions for prevention. The information is timely, pertinent and entertaining as Jeff uses humor to keep things upbeat.
302-B	What is Keeping Insurers Up at Night? The Realities of the Higher Education Insurance (Stacie R. Kroll)	In this current environment, higher education institutions continue to face a flurry of strategic threats to our operations. Combine ongoing threats with a hardening insurance market and it is more critical than ever for institutions of higher ed to recognize and fully understand the realities of the insurance market as well as what is of most concern to underwriters. During this session, you will: 1) Understand the current insurance market conditions with a focus on property, casualty, cyber, and management liability, 2) Learn how market conditions and evolving industry specific risks could impact your insurance program, 3) Gain real insights to support strategic planning and drive more favorable renewals.
Concurrent Sessions #8		
303-A	Long-Term Capital Planning in a Rising Rate Environment (Chris Kabourek, Michael Volna, Michael Osborn, & Mary Jane Darby)	Higher education leadership teams regularly evaluate how market conditions may affect capital plans. For the better part of a decade, market discussions focused on low long-term rates and the perceived likelihood that rates couldn't go much lower. However, over the past 18 months, the discussion shifted to concerns about rising rates. Whether an institution adjusts their financing approach or not, it is expressing a view on interest rates. In this session, financial professionals from University of Nebraska System and University of Minnesota will discuss the need for long-term asset stewardship, their typical approach to capital financing, and the unique circumstances that drove strategy for their most recent debt issues. This session will also include the perspective of a higher education rating analyst to provide an external view of the sector's approach to capital funding in an environment where expense pressure is growing.
303-B	The Threat Assessment Team: A Key Factor in Keeping Your Campus Safe (Matthew Doherty & Denise Bulling)	When early intervention and prevention are core components of your educational institution's policies and procedures, you have an improved opportunity to identify concerns early, investigate, and connect person with necessary resources to address problems before they lead to violence. The multi-disciplinary threat assessment team is a key component in this strategy based on seminal research conducted by the U.S. Secret Service National Threat Assessment Center at the request of the U.S. Department of Education. Subject matter experts Denise Bulling and Matthew Doherty share their knowledge and experience.

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Concurrent Sessions #8		
303-C	Building Your Yellow Brick Road (Adeeb Mozip & Nikki Taylor-Vargo)	Higher education institutions face mounting pressure to develop innovative academic programs that attract new and diverse students, advance vital parts of institutional missions, and meet job market needs while increasing access to new fields and industries for underrepresented and non-traditional students. This session outlines aspects of designing forward-looking academic programs and discusses the strategies and challenges inherent to creating novel and appealing pathways "yellow brick roads" for generating new revenue and strengthening institutions financial sustainability. Presenters will draw from their experience in forming strategic partnerships to develop and launch new academic programs at Wayne State University.
303-D	Chart of Accounts Considerations - Is it time to rebuild? (Sarah Loghin)	Chart of accounts are often inherited and need to be modified to meet the evolving data needs of an institution. Attend this session for an exploration of the basic elements of the chart of accounts that may come up in popular accounting systems. This presentation will include a discussion of best practices in chart of accounts, change management and data governance. Learn how to align your chart of accounts to answer the questions being answered by your stakeholders.