



# SACUBO

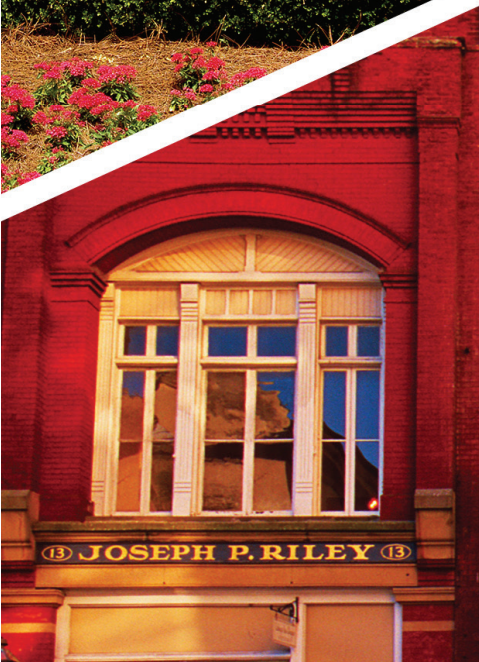
SOUTHERN ASSOCIATION OF COLLEGE  
AND UNIVERSITY BUSINESS OFFICERS

# 2021 FALL WORKSHOP

**HISTORIC INNOVATIONS**

November 10-12, 2021

Marriott Charleston  
Charleston, SC



# SCHEDULE AT A GLANCE

## WEDNESDAY, NOVEMBER 10

10:00 am - 5:00 pm	Registration/Information
12:00 pm - 12:50 pm	Session I
1:00 pm - 1:50 pm	Session II
2:00 pm - 2:50 pm	Session III
2:50 pm - 3:10 pm	Break
3:10 pm - 4:00 pm	Session IV
4:10 pm - 5:00 pm	Session V
6:00 pm - 9:00 pm	Opening Dinner Reception

## THURSDAY, NOVEMBER 11

7:00 am - 4:00 pm	Registration/Information
7:00 am - 8:00 am	Breakfast
8:00 am - 9:10 am	Welcome and General Session I
9:20 am - 10:10 am	Concurrent Sessions and Accounting Track I
10:10 am - 10:40 am	Break and Pop Up Networking
10:40 am - 11:30 am	Concurrent Sessions and Accounting Track II
11:30 am - 1:00 pm	Lunch
1:00 pm - 1:50 pm	Concurrent Sessions and Accounting Track III
2:00 pm - 2:50 pm	Concurrent Sessions and Accounting Track IV
2:50 pm - 3:20 pm	Break and Pop Up Networking
3:20 pm - 4:10 pm	Concurrent Sessions and Accounting Track V
4:20 pm - 5:10 pm	Concurrent Sessions and Accounting Track VI
5:10 pm - 6:10 pm	Happy Hour

## FRIDAY, NOVEMBER 12

7:30 am - 11:00 am	Registration/Information
7:00 am - 8:00 am	Breakfast
8:00 am - 9:10 am	Welcome and General Session II
9:20 am - 10:10 am	Concurrent Sessions and Accounting Track VII
10:10 am - 10:40 am	Break and Pop Up Networking
10:40 am - 11:30 am	Concurrent Sessions and Accounting Track VIII

# CONTENTS

Welcome Letter	4
Board of Directors	6
Professional Development Committee	8
Technology Information and How to Check In/Out for CPEs	9
Accounting Track Information	10
Business Partners	11
General Program	12
Concurrent Sessions at a Glance	35
Upcoming Events	36
Hotel Event Floor Plan	37
Get Involved/Stay in Touch	38



**September 20, 2021**

**Dear Colleagues:**

Welcome to the Marriott Charleston in beautiful Charleston, SC! Whether this is your first time attending a SACUBO conference or you are a long-time attendee, I believe this experience will prove valuable to your professional career.

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

The SACUBO Fall Workshop offers something for everyone. Don't overlook the many opportunities to meet new colleagues and expand your network of peers. Thank you for participating this year. I hope you find the experience rewarding personally and professionally.

Wishing you all the best,

**Susan Maddux**  
**SACUBO President**



# SACUBO BOARD

## 2021-22

### **President**

**Susan Maddux**

*Vice President for Finance and Administration, Furman University*

### **First Vice President**

**John Crawford**

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

### **Second Vice President**

**Noel Sloan**

*Senior Vice President of Administration and Finance and Chief Financial Officer, Texas Tech University*

### **Vice President of Finance**

**Darrell Duncan**

*Vice President for Finance, Lipscomb University*

### **Past President**

**Russ Hannah**

*Chief Financial Officer, Arkansas State University*

### **Treasurer**

**Jimmy Barnes**

*Senior Lecturer, School of Accountancy, Clemson University*

### **Assistant Treasurer**

**Mike Ebbs**

*Associate Vice Chancellor, University of Tennessee Health Science Center*

### **Secretary & Communications & Marketing Director**

**Brenna Dixon**

*Associate Controller, Oklahoma State University*

### **Business Partner Relations Coordinator**

**Jeremy Digorio**

*Associate Vice President for Budget and Financial Planning, Stetson University*

### **Professional Development Committee, Co-Chair**

**Kevin Edelblute**

*Assistant Vice President, Controller and Treasurer, Mississippi State University*

### **Professional Development Committee, Co-Chair**

**Jamie Loftin**

*Assistant Vice Provost for Distance Education  
Administration, University of Arkansas*

### **At Large (Comprehensive & Doctoral Institutions)**

**Myra Goodwin**

*Controller, Arkansas State University*

### **At Large (Research Institutions)**

**Brett Powell**

*Assistant Vice President and Controller, Baylor University*

### **At Large (Small Institutions)**

**Undria Stalling**

*Senior Vice President of Business and Finance/Chief  
Financial Officer, Morehouse College*

### **At Large (Community Colleges)**

**Debbie Walker**

*Vice President for Business Affairs, Midlands Technical  
College*

### **Research Institutions Constituent Committee Chair**

**Kelly Epting**

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

### **Comprehensive & Doctoral Institutions Constituent Committee Chair**

**Valarie Van Vlack**

*Treasurer, Texas State University*

### **Small Institutions Constituent Committee Chair**

**Chris Gardner**

*Chief Financial Officer, Wofford College*

### **Community Colleges Constituent Committee Chair**

**Randy Ellis**

*Chief Accounting Officer/Controller, Virginia Community  
College System*

# SACUBO PROFESSIONAL DEVELOPMENT COMMITTEE 2021-22

**Kevin Edelblute, Co-Chair**

*Mississippi State University*

**Jamie Loftin, Co-Chair**

*University of Arkansas*

**Myra Goodwin, NASBA Coordinator**

*Arkansas State University*

**John Crawford**

*Texas A&M University*

**Darrell Duncan**

*Lipscomb University*

**Randy Ellis**

*Virginia Community College System*

**Kelly Epting**

*University of South Carolina*

**Chris Gardner**

*Wofford College*

**Russ Hannah**

*Arkansas State University*

**Susan Maddux**

*Furman University*

**Julie Parrish**

*Medical University of South Carolina*

**Noel Sloan**

*Texas Tech University*

**Valarie Van Vlack**

*Texas State University*



# TECHNOLOGY INFORMATION

Wifi is Available Throughout the Meeting Space

Network: SACUBO Fall Workshop

Password: ARAMARK

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

Go to the App Store or Google Play and search for **SACUBO**. Then select **SACUBO 2021 Fall Workshop** and tap **download**. If you already have the SACUBO app on your device, open it, and tap **Exit to Event List** from the dashboard to view the app for this event.

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

## NEED CPEs?

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

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

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



# 2021 BUSINESS ACCOUNTING TRACK

SACUBO's Professional Development Committee is delighted to partner again with Cherry Bekaert to provide the Business Accounting Track at the Fall Workshop. Sessions are tailored around accounting, audit, tax, and various areas of compliance. These sessions are designed to focus on critical accounting competencies facing the higher education community and provide attendees a total of 8 CPEs.

**SACUBO appreciates the time, effort, and staff provided by Cherry Bekaert to support quality continuing education opportunities for SACUBO members.**

Sponsored by



# BUSINESS PARTNERS

## Executive



## President



## Director



## Associate



## Partner



# WEDNESDAY, NOVEMBER 10

10:00 AM – 5:00 PM

## **Registration/Information**

*Crystal Ballroom Lobby*

12:00 - 12:50 PM

## **Transforming Higher Education with Data Analytics**

*Crystal Ballroom A-D*

### **McKenna Beddingfield, Cherry Bekaert**

As higher education continues to transform to meet disruptive and evolving social, economic and community demands, an academic data-driven institution with a data-immersed culture will have the competitive advantage. An effective advanced analytics strategy can significantly transform an academic institution by identifying new ways to engage current and prospective students, increase enrollment, improve retention and completion rates and pinpoint financial and development opportunities. With end-to-end analytics built into overall decision models, academic institutions are able to quickly access and analyze their data to build resiliency, drive smarter strategies and set priorities.

**1 CPE Credit; CPE Category: Finance**

1:00 - 1:50 PM

## **A Single Solution To Solve Multiple Higher Ed CFO Office Needs**

*Crystal Ballroom A-D*

**Joel Bittick | OneStream Software LLC**

**Teresa Edwards | Texas A&M University System**

**John Schmidt | University of Texas Southwestern**

**Medical Center**

**Meghan Wood | MindStream Analytics**

**Kathleen Kissam | Excel Global Partners**

Higher Education Institutions, large and small, public or private, 4 year or 2 year have been purchasing single solutions over the last 20+ years to solve discreet CFO office issues around YE Accounting Close (Fund reclassifications, Adjusting Journal Entries, Fund Account Reconciliations, etc), AFR/ Statutory Reporting efficiencies, ST & LT Tuition Planning, Budgeting, People/Position Planning, Fundraising Analysis, Program Profitability, and Treasury Accounting before finding that the maintenance around cobbling together data movements and hierarchies was more than expected and limiting the value of the original purchase.

# WEDNESDAY, NOVEMBER 10

Come hear the start of the journeys of the both the Texas A&M University System and University of Texas Southwestern Medical as they have recently solved at least one key pain point above using OneStream software, with the ability and intention to extend to additional use cases over time in the OneStream platform.

The Texas A&M University System replaced a sunset Sunguard APS2 Treasury Accounting Solution using OneStream implemented by MindStream Analytics to provide sophisticated interest expense and interest income allocations to its member institutions based on their Cash Investment contributions and Working Capital usage with enhanced reporting and analytics.

UTSW's John Schmidt implemented OneStream with Excel Global Partners to resolve the significant level of effort and manual processes supporting their Accounting Close and creation of their Annual Financial Reports as well as other reporting requirements.

They were able to recognize several benefits from OneStream including:

- Transparency into their numbers and processes
- All reporting requirements in one application
- Automation of multiple manual processes
- Automated AFR compilation of reports with efficient analysis and improved accuracy

**1 CPE Credit; CPE Category:  
Computer Software & Applications**

2:00 - 2:50 PM

**Transforming Tuition Planning at University of Kentucky**  
*Crystal Ballroom A-D*

**Brad West | University of Kentucky**

**Disha Venkatesan | Syntellis Performance Solutions**

Tuition serves as one of the primary sources of revenue for most universities and the University of Kentucky is no exception. That is precisely why the institution moved from forecasting tuition revenue for upcoming semesters from Excel into a purpose-built solution designed just for tuition planning. Join this session to hear how the University of Kentucky improved the efficiency and accuracy of their tuition modeling process while also increasing their agility to model different tuition scenarios and respond to sudden changes in enrollment volumes and student mix.

**1 CPE Credit; CPE Category: Specialized Knowledge**

2:50 – 3:10 PM

**Break**

*Crystal Ballroom Foyer*

3:10 - 4:00 PM

**Concurrent Sessions**

**Technology and the Student Engagement Experience**

*Crystal Ballroom A-D*

**Ken Libutti | Palm Beach State College**

**Mary Frances Coryell | Ivy.ai**

Join us as we discuss Palm Beach State's Loss Momentum Project and how technology is leveraged to enhance and unify the student experience. Learn how the student technology experience team deconstructed the full student lifecycle, underwent process mapping, and analyzed touchpoints in the student journey. We will hear which technologies optimize each touchpoint by understanding the audience, the communication type/topic, the efficacy of communication, push/pull campaigns, and rich data insights for further refinement. Areas of discussion will include Palm Beach State's student success platform, learning management system, student information system, web interface, phone center, and AI chatbot technology. Themes will include self-help and personalization through authentication, capturing the student experience to deliver the best possible service.

**1 CPE Credit; CPE Category: Management Services**

**Leveraging the Power of Diverse Perspectives around your Investment Strategy**

*Crystal Ballroom E-F*

**Elizabeth Cabell Jennings | Truist**

**Armond R. Reese | Truist**

**Sabrina Bowens-Richard CFA | Truist**

Taking advantage of different life experiences and views to develop a differentiated investment portfolio strategy.

**1 CPE Credit; CPE Category: Finance**

4:10 - 5:00 PM

**Concurrent Sessions**

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

*Crystal Ballroom E-F*

**Matthew Socha | Cherry Bekaert LLP**

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

**1 CPE Credit; CPE Category: Accounting**

**GASB Update**

*Crystal Ballroom A-D*

**Teresa Edwards | Texas A&M University System**

The Governmental Accounting Standards Board (GASB) continues to impact higher education financial reporting. This session will review existing and emerging issues to help us address these impacts. Areas of discussion will include current standards GASB 84-Fiduciary Activities and GASB 87-Leases; plus, future standards GASB 94-Public Private Partnerships/ Availability Payment Arrangements and GASB 96-Subscription Based Information Technology. In addition, this session will provide an update on GASB's 'big three' upcoming projects. The Texas A&M University System will share lessons learned on GASB 84, provide NACUBO resources, and discuss GASB 87-Lease implementation challenges.

**1 CPE Credit; CPE Category: Accounting - Governmental**

6:00 - 9:00 PM

**Opening Dinner Reception**

**All aboard the USS Yorktown - Patriots Point**

Gather with friends and colleagues to celebrate being together again. The USS Yorktown, WWII's famous "Fighting Lady," provides a unique setting to dine and network. Tours will be provided.

**Transportation will be provided. Attendee and guest badges will be required to enter event.**

**Buses will begin departing from the Crystal Ballroom entrance at 5:45 PM. Continuous shuttle service will be provided. The last bus will leave the hotel at 8 PM and the final buses will leave the Yorktown - Patriots Point at 9 PM.**

# THURSDAY, NOVEMBER 11

7:00 AM – 4:00 PM

## **Registration/Information**

*Crystal Ballroom Lobby*

7:00 – 8:00 AM

## **Breakfast**

*Crystal Ballroom Lobby*

8:00 – 9:10 AM

## **Welcome and General Session - Dr. Ivan Joseph**

*Crystal Ballroom A-D*

**Susan Maddux | SACUBO President, Vice President for Finance and Administration, Furman University**

**Dr. Ivan Joseph | Vice President, Student Affairs, Laurier University**

An award-winning coach, educator, and leader, Joseph has spent his career leading cultural transformation, helping people believe in themselves, and creating cohesive teams. He speaks about self-confidence, embracing the “grit” to persevere despite setbacks, and leading teams to success, drawing from the lessons he’s learned from a life in sport. Currently the Vice President, Student Affairs at Laurier University, Joseph leads the university’s effort to promote interconnectedness and belonging among a diverse student body drawn from across the country and around the globe.

**Sponsored by**



**1 CPE Credit; CPE Category: Personal Development**



# THURSDAY, NOVEMBER 11

9:20 - 10:10 AM

## Concurrent Sessions

### **Accounting Track - Unrelated Business Income in the Higher Ed Landscape**



*Opal Room*

**Amanda Adams | Cherry Bekaert LLP**

Higher education institutions are increasingly diversifying their revenue sources in order to keep tuition rates competitive. However, they must consider modifications and exclusions that determine whether revenue is treated as taxable unrelated business income ("UBIT"). Through proper planning, institutions may be able to anticipate and mitigate the impact of UBIT on their bottom line and exempt status. In this session, we will discuss common sources of UBIT for higher education institutions as well as opportunities to reduce or eliminate UBIT through proper planning or structural considerations.

**1 CPE Credit; CPE Category: Taxes**

### **Navigating the Pandemic to Enhance Strategic Excellence**

*Emerald Ballroom Two*

**Stacey Bradley | University of South Carolina**

**Kelly Epting | University of South Carolina**

**Mandy Kibler | University of South Carolina**

This session will highlight a coordinated, strategic approach to crisis management that resulted in future-looking adjustments and shared knowledge. "Don't let a good crisis go to waste" may be a cliché, but the evolution of technology, service delivery, and communications flow that the University of South Carolina embraced during the COVID-19 pandemic have led to efficiencies and enhancements that would have taken years to accomplish otherwise. The University Controller, Associate Vice President for Budget and Finance, and Senior Associate Vice President for Student Affairs, and Academic Support will highlight their shared successes and engage in an interactive discussion with participants about future opportunities.

**1 CPE Credit; CPE Category: Management Services**

9:20 - 10:10 AM

**Concurrent Sessions**

**Merchant Payment Acceptance in the College and University Environment**

*Emerald Ballroom One*

**James F Lock | J.P. Morgan Chase Bank**

**Lina Schmidt | J.P. Morgan Chase Bank**

A thoughtful discussion of the complex landscape of payment acceptance in the Higher Education industry. Accepting credit and debit cards is necessary in today's payment environment, but it is important to recognize that institutions face several challenges in doing so. These often include but are not limited to the costly and complex merchant processing environment as well as points of friction across the collection process that can create potential data security concerns.

**1 CPE Credit; CPE Category: Management Services**

**Post-Pandemic Financial Planning and Budgeting**

*Emerald Ballroom Three*

**Matt Swanson | Jacksonville University**

**Jeremy DiGorio | Stetson University**

**Jacqui DiMaggio | Greenville Technical College**

COVID-19 has, for many institutions, altered resource management and financial planning priorities and strategies. As we move into a post-pandemic operating environment, budgets must now, more than ever, be designed to breathe life into initiatives and enhancements that will position college and university communities for strategic change and success. This session provides an opportunity for participants to engage with financial planning leaders from multiple institutions and discuss strategies to move institutions forward via financial plans post-pandemic.

**1 CPE Credit; CPE Category: Management Services**

**Retention: Definitions, Measurements, Reporting and Interventions**

*Crystal Ballroom E-F*

**Tonya Riney | IntelliBoard**

**Christopher Coleman | Louisiana Tech University**

At-risk, retention and engagement are all critical foci for the higher education environment. Outcomes include a review of commonly used measurements for retention metrics, reporting for at-risk learners, and overview of interventions that can impact retention for higher education institutions.

**1 CPE Credit; CPE Category: Specialized Knowledge**

10:10 – 10:40 AM

**Break and Pop Up Networking**

During our extended break, join our speakers and SACUBO past presidents for a less formal discussion of the session you just attended. Step up to the front of the room for an opportunity to meet the session participants and engage with SACUBO's past presidents to continue the conversation.

Or you can join our other networking session in the Crystal Ballroom: CAREER PATH & SACUBO VOLUNTEERING. Join SACUBO past presidents and current board members to learn how their diverse career paths led them to become higher education business officers and how SACUBO participation supported their careers.

10:40 - 11:30 AM

**Concurrent Sessions**

**Accounting Track - Higher Education Emergency Relief Funds**



*Opal Room*

**Roselle Bonnoitt | Cherry Bekaert LLP**

In this session, we will discuss uses of the student and institutional portions of the Higher Education Emergency Relief Funds ("HEERF") II and HEERF III, including lost revenue, as well as compliance, accounting, and financial reporting considerations for these funds. Topics discussed will include audit and compliance implications, specifically, allowable costs, period of performance, earmarking and reporting requirements for the funds.

**1 CPE Credit; CPE Category: Accounting**

**Repeat - Navigating the Pandemic to Enhance Strategic Excellence**

*Emerald Ballroom Two*

**See Description in the 9:20 AM Session**

**1 CPE Credit; CPE Category: Management Services**

**Repeat - Post-Pandemic Financial Planning and Budgeting**

*Emerald Ballroom Three*

**See Description in the 9:20 AM Session**

**1 CPE Credit; CPE Category: Management Services**

10:40 - 11:30 AM

**Concurrent Sessions**

**Repeat - Merchant Payment Acceptance in the College and University Environment**

*Emerald Ballroom One*

**See Description in the 9:20 AM Session**

**1 CPE Credit; CPE Category: Management Services**

**Repeat - Retention: Definitions, Measurements, Reporting and Interventions**

*Crystal Ballroom E-F*

**See Description in the 9:20 Session**

**1 CPE Credit; CPE Category: Specialized Knowledge**

11:30 AM - 1:00 PM

**Lunch**

*Various Locations*

**Lunch will be grab-n-go that allows you several options to join with your colleagues. Grab your lunch and head to the main room, pool, or lobby gathering areas.**

1:00 - 1:50 PM

**Concurrent Sessions**

**Accounting Track - A Comprehensive Look at GASB 87, 94 and 96: Reporting and Recognition of Right-to-Use Assets - PART I**



*Opal Room*

**Brian Liffick | Cherry Bekaert LLP**

**Richard Hart | Cherry Bekaert LLP**

Public institutions will need to implement certain policies and procedures to ensure proper compliance with new rules on accounting for right-to-use assets under GASB 87, 94 and 96. The desire of GASB is to more accurately portray these obligations and receivables and increase the usefulness of governmental financial statements. This 100-minute, double session will provide a deep dive into these three new standards, implementation issues, and practical tips and tricks for your implementation.

**1 CPE Credit; CPE Category: Accounting - Governmental**

1:00 - 1:50 PM

**Concurrent Sessions****Your Executive Presence in a Hybrid World***Emerald Ballroom Two***Terri Bump | American Campus Communities**

Do you have the communication skills to be heard, the gravitas to gain respect and an appearance that garners positive professional interest? What does that look like, sound like and feel like on screen? Let's talk about how you can maximize your on-screen meetings and build relationships in a virtual world. You know that executive presence will get you noticed and sponsored. This fast-paced session will share information on the how, what, and why of being visible, sponsored, and promoted in person and on screen. Both being a leader and being perceived by others as a leader will be critical to your success. Virtual meetings have their advantages. Let's break them down and improve our impact. We will take a look at our communication, gravitas, and appearance so we can identify and embody the executive presence (in person & on screen) required to make our own choices and control our destiny.

**1 CPE Credit; CPE Category: Personal Development****Lying, Cheating, and Stealing - Oh My... Understanding Fraud and Modern Fraud Schemes***Emerald Ballroom One***Phillip Hurd | University of Houston**

This session will explore the dark underworld of fraud, malfeasance, and theft. It will explain the basic concepts of fraud and controls that should be able to be in place through every organization. It will explain how data analytics can be used as a deterrent to fraud and will cover a fraud scheme that is difficult to detect and seems legitimate on the surface. This session will have humor, excitement, and real-world applicability.

**1 CPE Credit; CPE Category: Behavioral Ethics**

**Owning Your Campus Operations: Transitioning from Outsourced to In-House Dining Services**

*Crystal Ballroom E-F*

**Trey Arrington | Spartanburg Methodist College**

**Doug Brown | Spartanburg Methodist College**

Spartanburg Methodist College, like many colleges and universities, previously allowed some of our operations to be outsourced. Recently, SMC has made an effort to bring those operations back in-house, in order to provide better customer service, control the entire campus experience, and find new ways to provide a better quality of life for our campus community. In this session, we will discuss the planning of bringing dining services in-house, who the stakeholders are that need to be involved, what that actual transition was like, what do dining services look like now, and what do we see is the future of our in-house dining program.

**1 CPE Credit; CPE Category: Specialized Knowledge**

**So You Say You Want A Transformation? Our ERP Journey: 21 Institutions To One System of Record**

*Emerald Ballroom Three*

**Tara Smith | University of Arkansas System**

**Amy Ludwig | University of Arkansas System**

The University of Arkansas System's experience ERP implementation experience will be used as a case study to discuss the assessment process and implementation strategies.

**1 CPE Credit; CPE Category: Computer Software & Applications**

2:00 - 2:50 PM

**Concurrent Sessions**

**Accounting Track - A Comprehensive Look at GASB 87, 94 and 96: Reporting and Recognition of Right-to-Use Assets - PART II**



*Opal Room*

**Brian Liffick | Cherry Bekaert LLP**

**Richard Hart | Cherry Bekaert LLP**

Public institutions will need to implement certain policies and procedures in order to ensure proper compliance with new rules on accounting for right-to-use assets under GASB 87, 94 and 96. The desire of GASB is to more accurately portray these obligations and receivables and increase the usefulness of governmental financial statements. This 100-minute, double session will provide a deep dive into these three new standards, implementation issues, and practical tips and tricks for your implementation.

**1 CPE Credit; CPE Category: Accounting - Governmental**

2:00 - 2:50 PM

**Concurrent Sessions**

**Repeat - Your Executive Presence in a Hybrid World**

*Emerald Ballroom Two*

**See Description in the 1:00 PM Session**

**1 CPE Credit; CPE Category: Personal Development**

**Repeat - Lying, Cheating, and Stealing - Oh My...  
Understanding Fraud and Modern Fraud Schemes**

*Emerald Ballroom One*

**See Description in the 1:00 PM Session**

**1 CPE Credit; CPE Category: Behavioral Ethics**

**Repeat - Owning Your Campus Operations: Transitioning  
from Outsourced to In-House Dining Services**

*Crystal Ballroom E-F*

**See Description in the 1:00 PM Session**

**1 CPE Credit; CPE Category: Specialized Knowledge**

**Repeat - So You Say You Want a Transformation? Our ERP  
Journey: 21 Institutions to One System of Record.**

*Emerald Ballroom Three*

**See Description in the 1:00 PM Session**

**1 CPE Credit; CPE Category:  
Computer Software & Applications**

2:50 - 3:20 PM

**Break and Pop Up Networking**

During our extended break, join our speakers and SACUBO past presidents for a less formal discussion of the session you just attended. Step up to the front of the room for an opportunity to meet the session participants and engage with SACUBO's past presidents to continue the conversation.

Or you can join our other networking session in the Crystal Ballroom A-D: "RETIREMENT TRANSITIONS" Retirement impacts the individual retiring and many coworkers who experience changes in responsibilities and staffing. SACUBO past presidents and board members discuss their experiences with their own retirement transition and others at their institutions.

3:20 - 4:10 PM

**Concurrent Sessions**

**Accounting Track - Implementing FASB's Lease Standard Topic 842**



*Opal Room*

**Alex Wiley | Cherry Bekaert LLP**

This session will provide an overview of the new lease accounting and reporting requirements under ASC Topic 842 that impact intuitions of higher education and related organization that report under FASB standards. The session will cover both technical elements of the new standard and a practical examples of how to approach your implantation.

**1 CPE Credit; CPE Category: Accounting**

**How Student Financial Services Can Lead Collaboration To Support Student Success**

*Emerald Ballroom One*

**Chris Foster, University of North Texas**

In this session, UNT Student Financial Services will describe the steps that our team began in 2018 to rebrand our department image from "transactional" to "campus partner." We implemented a multi-year approach to identifying campus partners, process improvements, and key collaborations which enhance student service and remove barriers such as our Start Green, Stay Green triage program.

**1 CPE Credit ; CPE Category: Management Services**

**Creative Funding Mechanisms for Capital & Deferred Maintenance Projects**

*Emerald Ballroom Three*

**Ryan Ball | Schneider Electric**

**Charlie Daum | Alturus**

**Graham Lewis | Schneider Electric**

**Barry Wilhelm | Schneider Electric**

This session will explore creative financing tools for funding capital and deferred maintenance projects at higher education institutions, specifically in light of new options available since 2020. Attendees will have an opportunity to brainstorm solutions based on current challenges on their campuses.

**1 CPE Credit; CPE Category: Management Services**



3:20 - 4:10 PM

**Concurrent Sessions****Creating Comprehensive and Integrated Planning Models that Support Institution Wide Decision Making***Emerald Ballroom Two***John Pierce | University of North Carolina, Asheville****Antonio McDaniel | North Carolina Central University****Bryan Elmore | Auburn University****Curtis Gratz | Spaulding Ridge, LLC.**

Join a panel of fellow SACUBO peers and industry experts to discuss here how these progressive institutions are creating processes and models that help integrate data and improve decision-making. We will discuss some of the challenges facing their institutions, differences between their institutions as well as how they are approaching their transformation, and the benefits they hope to achieve. The discussion will venture into many of the operational, financial, and other issues they are currently confronting and the various ways they are connecting these plans and the entire institution together as well as why it is imperative to do this and help position their institution for future success. We plan to share concrete examples, including a brief demo, of the steps taken, current state, and vision for the future.

Experts from Auburn University, University of North Carolina Asheville, North Carolina Central University, and Spaulding Ridge will share:

- Why each institution has embarked on transforming the models and processes they leverage to report and plan.
- Where each institution currently sits in their journey to improve planning and reporting.
- What benefits each institution has already been able to achieve and what they hope to achieve over future time horizons.
- Trends, experiences, and other examples that other institutions across the nation are doing to transform their processes.

**1 CPE Credit ; CPE Category: Management Services**

**Strategic Visioning for Justice and Equity at a Small Liberal Arts College**

*Crystal Ballroom E-F*

**Christine Sorrell Dinkins | Wofford College**

**Ramón Galiñanes | Wofford College**

Wofford College recently completed a year-long strategic visioning process for Justice, Equity, Diversity, and Inclusion (JEDI). The work was conducted by the JEDI strategic vision committee, which included faculty, staff, trustees, and students who worked with the shared goal of lighting a path toward a more just and equitable Wofford for the future. In this presentation, the co-chairs of Wofford's JEDI committee will discuss their process and outcomes, along with the benefits and challenges of a mixed-membership committee in which trustees, students, faculty, and staff worked collaboratively on a project with such a large scope. Topics will include: process design, budgeting, deputizing students as researchers, managing a large committee and workload in a short time-frame, inclusion of alumni and community input via listening sessions and surveys, the value of consultants, and the intersection of qualitative research analysis with strategic visioning. The presenters will leave ample time for Q&A and discussion.

**1 CPE Credit; CPE Category: Behavioral Ethics**

4:20 - 5:10 PM

**Concurrent Sessions**

**Accounting Track - Hot Topics in Higher Education Taxation**

*Opal Room*

**Sarah McGregor | Cherry Bekaert LLP**

**Amanda Adams | Cherry Bekaert LLP**

This session will cover various hot topics in the world of taxation including issues matters that have become more pronounced in the wake of COVID-19, such as international and domestic taxation for employees, tax credits and stimulus, tax reforms impacting higher education, and other various matters that may be relevant to your instruction.

**1 CPE Credit; CPE Category: Taxes**



**Repeat - How Student Financial Services Can Lead Collaboration to Support Student Success**

*Emerald Ballroom One*

**See Description in the 3:20 PM Session**

**1 CPE Credit; CPE Category: Management Services**

**Repeat - Creating Comprehensive and Integrated Planning Models that Support Institution Wide Decision Making**

*Emerald Ballroom Two*

**See Description in the 3:20 PM Session**

**1 CPE Credit; CPE Category: Management Services**

**Repeat - Strategic Visioning for Justice and Equity at a Small Liberal Arts College**

*Crystal Ballroom E-F*

**See Description in the 3:20 PM Session**

**1 CPE Credit; CPE Category: Behavioral Ethics**

**Repeat - Creative Funding Mechanisms for Capital & Deferred Maintenance Projects**

*Emerald Ballroom Three*

**See Description in the 3:20 PM Session**

**1 CPE Credit; CPE Category: Management Services**

5:10 - 6:10 PM

**Happy Hour**

*Courtyard & Topaz Ballroom*

**Join your friends and colleagues for a social hour and share your experiences of the day. Don't forget to stop by and visit our business partners to thank them for supporting SACUBO and the Fall Workshop.**

Sponsored by



# FRIDAY, NOVEMBER 12

7:30 - 11:00 AM

## **Registration/Information**

*Crystal Ballroom Lobby*

7:00 - 8:00 AM

## **Breakfast**

*Crystal Ballroom Lobby*

8:00 - 9:10 AM

## **Opening Remarks and General Session - Historic Innovation - Chief Business Officer's Shifting Role**

*Crystal Ballroom A-D*

**Christina Cutlip | TIAA**

**Debbie Walker | Midlands Technical College**

**John Crawford | Texas A&M**

**Russ Hannah | Arkansas State University**

**Undria Stallings | Morehouse College**

The role of chief business officers in higher education institutions is shifting and expanding; hear more on how your fellow SACUBO colleagues have shifted their mindset, skills and roles as well as how networking has benefited them in adapting to the ever changing environment in higher ed.

**Sponsored by**



**1 CPE Credit; CPE Category: Management Services**

# FRIDAY, NOVEMBER 12

9:20 - 10:10 AM

## Concurrent Sessions

### Accounting Track - GASB Financial Reporting Model Improvements and Revenue and Expense Recognition Projects and the Impact on Higher Ed

*Crystal Ballroom A-D*

#### **Scott Anderson | Governmental Accounting Standards Board**

A GASB Practice Fellow will present information on future GASB standards. This session will provide an update on the current status of the Financial Reporting Model Improvements and Revenue and Expense Recognition Projects currently in process with the GASB and the potential impacts on public institutions of higher education.

**1 CPE Credit; CPE Category: Accounting - Governmental**

### Investments in Student Success Initiatives

*Emerald Ballroom One*

#### **Benjamin Harmon | Austin Peay State University**

#### **Loretta Griffy | Austin Peay State University**

#### **Timothy King | Jacksonville State University**

Higher education institutions are complex organizations attempting to meet the needs of an even more complex and diverse student body. To maximize outcomes of investing in initiatives, higher education finance and student success professionals must intentionally collaborate. In this session, we will discuss the challenges and benefits of investing in initiatives intended to efficiently improve student progression and quality of learning. The discussion will focus on five initiatives: (1) Coaching historically at-risk populations, (2) Redesigning remedial and development education, (3) Utilizing labor market data in designing curriculum, (4) simplifying learning support in a centralized location, and (5) Maximizing student friendly retention technology for data driven planning.

**1 CPE Credit; CPE Category: Specialized Knowledge**

9:20 - 10:10 AM

**Concurrent Sessions**

**Data Analytics: What Information Are You Pulling/Slicing/Dicing Post-Pandemic**

*Emerald Ballroom Two*

**Russ Hannah | Arkansas State University**

**Jimmy Barnes | Clemson University**

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.

**1 CPE Credit; CPE Category: Finance**

**The National Coalition Building Institute: A Leadership Approach To Building Diverse/Inclusive Colleges and Universities**

*Emerald Ballroom Three*

**Julie Lipovsky | National Coalition Building Institute (NCBI)**

Colleges and universities are under pressure to meet the needs of a diverse student body, faculty, and staff. "Diversity training" programs have been incorporated into the curriculum in many institutions. There are various approaches to addressing the topic, one of which is the National Coalition Building Institute (NCBI). NCBI is an international leadership organization that provides training in diversity, equity, and inclusion (DEI) in many settings, including college/university campuses. The US Department of Education's Gender Equity Expert Panel cited NCBI's work on college campuses as a national "Best Practice." The NCBI program is based on a set of principles that support places where people feel that they belong. Workshops use a series of experiential activities that are engaging, thought provoking and challenge participants' own assumptions. Campuses are encouraged to build their own teams that help to create a welcoming environment for students, faculty, and staff. Today's presentation will introduce NCBI's unique, non-blaming, personal approach to developing leadership skills for relationship building and welcoming diversity broadly defined. In addition, the presentation will describe the steps for building a campus program based on the presenter's experience building a successful NCBI team and program at The Citadel.

**1 CPE Credit; CPE Category:  
Personnel / Human Resources**

9:20 - 10:10 AM

**Concurrent Sessions****Title IX - Internal Counsel***Crystal Ballroom E-F***Amy Hass | University of Florida**

Amy Hass will share an overview of the landscape of Title IX and discuss recent changes to the rule. The session will explore how the current rule applies to both students and employees and how non-compliance can impact institutions financially.

**1 CPE Credit; CPE Category:  
Personnel / Human Resources**

10:10 – 10:40 AM

**Break and Pop Up Networking**

During our extended break, join our speakers and SACUBO past presidents for a less formal discussion of the session you just attended. Step up to the front of the room for an opportunity to meet the session participants and engage with SACUBO's past presidents to continue the conversation.

Or you can join our other networking session in the Crystal Ballroom A-D: "DEI EFFORTS ON CAMPUS" Diversity, Equity and Inclusion are hot topics on many campuses. SACUBO past presidents and board members discuss efforts on their campuses and how they have been successful or could be improved.

10:40 - 11:30 AM

**Concurrent Sessions**
**Accounting Track - 2021 Compliance Supplement  
& Single Audits Under Uniform Grant Guidance Update**
*Crystal Ballroom A-D***Brian Liffick | Cherry Bekaert LLP****Stephanie Isham | Cherry Bekaert LLP**

Institutions that received Federal awards subject to single audit will need to understand the various changes in order to ensure proper compliance with new 2021 Compliance Supplement. Additional information will be presented on the new COVID-19 programs available and the impact of COVID-19 on institutions 2021 single audits. This session will also provide a discussion on the anticipated key changes expected to be included in the future addenda to be issued by the Office of Management and Budget.

**1 CPE Credit; CPE Category: Accounting**

10:40 - 11:30 AM

**Concurrent Sessions**

**Repeat - Investments in Student Success Initiatives**

*Emerald Ballroom One*

**See Description in the 9:20 AM Session**

**1 CPE Credit; CPE Category: Specialized Knowledge**

**Repeat - Data Analytics: What Information Are You Pulling/Slicing/Dicing Post-Pandemic**

*Emerald Ballroom Two*

**See Description in the 9:20 AM Session**

**1 CPE Credit; CPE Category: Finance**

**Repeat - The National Coalition Building Institute: A Leadership Approach to Building Diverse/Inclusive Colleges and Universities**

*Emerald Ballroom Three*

**See Description in the 9:20 AM Session**

**1 CPE Credit; CPE Category:  
Personnel / Human Resources**

**Repeat - Title IX - Internal Counsel**

*Crystal Ballroom E-F*

**See Description in the 9:20 AM Session**

**1 CPE Credit; CPE Category:  
Personnel / Human Resources**





# CONCURRENT SESSIONS

Thursday, November 11					
	Crystal Ballroom E-F	Emerald Ballroom One	Emerald Ballroom Two	Emerald Ballroom Three	Opal Room
9:20 - 10:10 AM	Retention: Definitions, Measurements, Reporting and Interventions Tonya Riney   IntelliBoard Christopher Coleman   Louisiana Tech University	Merchant Payment Acceptance in the College and University Environment James F Lock   J.P. Morgan Chase Bank Lina Schmidt   J.P. Morgan Chase Bank	Navigating the Pandemic to Enhance Strategic Excellence Stacey Bradley   University of South Carolina Kelly Epting   University of South Carolina Mandy Kibler   University of South Carolina	Post-Pandemic Financial Planning and Budgeting Matt Swanson   Jacksonville University Jeremy DiGiorio   Stetson University	Accounting Track - Unrelated Business Income in the Higher Ed Landscape Amanda Adams   Cherry Bekaert LLP
10:40 - 11:30 AM	Repeat - Retention: Definitions, Measurements, Reporting and Interventions	Repeat - Merchant Payment Acceptance in the College and University Environment	Repeat - Navigating the Pandemic to Enhance Strategic Excellence	Repeat - Post-Pandemic Financial Planning and Budgeting	Accounting Track - Higher Education Emergency Relief Funds Roselle Bonnoitt   Cherry Bekaert LLP
1:00 - 1:50 PM	Owning Your Campus Operations: Transitioning from Outsourced to In-House Dining Services Trey Arrington   Spartanburg Methodist College Doug Brown   Spartanburg Methodist College	Lying, Cheating, and Stealing - Oh My... Understanding Fraud and Modern Fraud Schemes Phillip Hurd   University of Houston	Your Executive Presence in a Hybrid World Terri Bump   American Campus Communities	So You Say You Want a Transformation? Our ERP Journey: 21 Institutions to One System of Record Tara Smith   University of Arkansas System Amy Ludwig   University of Arkansas System	Accounting Track - A Comprehensive Look at GASB 87, 94 and 96: Reporting and Recognition of Right-to-Use Assets - PART I Brian Liffick   Cherry Bekaert LLP Richard Hart   Cherry Bekaert LLP
2:00 - 2:50 PM	Repeat - Owning Your Campus Operations: Transitioning from Outsourced to In-House Dining Services	Repeat - Lying, Cheating, and Stealing - Oh My... Understanding Fraud and Modern Fraud Schemes	Repeat - Your Executive Presence in a Hybrid World Terri Bump   American Campus Communities	Repeat - So You Say You Want a Transformation? Our ERP Journey: 21 Institutions to One System of Record	Accounting Track - A Comprehensive Look at GASB 87, 94 and 96: Reporting and Recognition of Right-to-Use Assets - PART II Brian Liffick   Cherry Bekaert LLP Richard Hart   Cherry Bekaert LLP

3:20 - 4:10 PM	Strategic Visioning for Justice and Equity at a Small Liberal Arts College Christine Sorrell Dimkins   Wofford College Ramón Galiñanes   Wofford College	How Student Financial Services Can Lead Collaboration To Support Student Success Chris Foster   University of North Texas	Creating Comprehensive and Integrated Planning Models that Support Institution Wide Decision Making John Pierce   University of North Carolina, Asheville Antonio McDaniel   North Carolina Central University Bryan Elmore   Auburn University Curtis Gratz   Spaulding Ridge, LLC	Creative Funding Mechanisms for Capital & Deferred Maintenance Projects Ryan Ball   Schneider Electric Charlie Daum   Alturus Graham Lewis   Schneider Electric Barry Wilhelm   Schneider Electric	Accounting Track - Implementing FASB's Lease Standard Topic 842 Alex Wiley   Cherry Bekaert LLP
4:20 - 5:10 PM	Repeat - Strategic Visioning for Justice and Equity at a Small Liberal Arts College	Repeat - How Student Financial Services Can Lead Collaboration To Support Student Success	Repeat - Creating Comprehensive and Integrated Planning Models that Support Institution Wide Decision Making	Repeat - Creative Funding Mechanisms for Capital & Deferred Maintenance Projects	Accounting Track - Hot Topics in Higher Education Taxation Sarah McGregor   Cherry Bekaert LLP Amanda Adams   Cherry Bekaert LLP
<b>Friday, November 12</b>					
<b>Crystal Ballroom E-F</b>					
9:20 - 10:10 AM	Title IX - Internal Counsel Amy Hass   University of Florida	Investments in Student Success Initiatives Benjamin Harmon   Austin Peay State University Loretta Griffy   Austin Peay State University Timothy King   Jacksonville State University	Data Analytics: What Information Are You Pulling/ Slicing/Dicing Post-pandemic Russ Hannah   Arkansas State University Jimmy Barnes   Clemson University	The National Coalition Building Institute: A Leadership Approach to Building Diverse/Inclusive Colleges and Universities Julie Lipovsky   National Coalition Building Institute (NCBI)	Accounting Track - GASB Financial Reporting Model Improvements and Revenue and Expense Recognition Projects and the Impact on Higher Ed Scott Anderson   Cherry Bekaert LLP
10:40 - 11:30 AM	Repeat - Title IX - Internal Counsel	Repeat - Investments in Student Success Initiatives	Repeat - Data Analytics: What Information Are You Pulling/ Slicing/Dicing Post-pandemic	Repeat - The National Coalition Building Institute: A Leadership Approach to Building Diverse/ Inclusive Colleges and Universities	Accounting Track - 2021 Compliance Supplement & Single Audits Under Uniform Grant Guidance Update Brian Liffick   Cherry Bekaert LLP Stephanie Isham   Cherry Bekaert LLP
<b>Crystal Ballroom A-D</b>					
<b>Emerald Ballroom Three</b>					
<b>Emerald Ballroom Two</b>					
<b>Emerald Ballroom One</b>					

# UPCOMING EVENTS

**March 2-4**

**2022 WOMEN'S  
LEADERSHIP FORUM**

*Atlanta, GA*

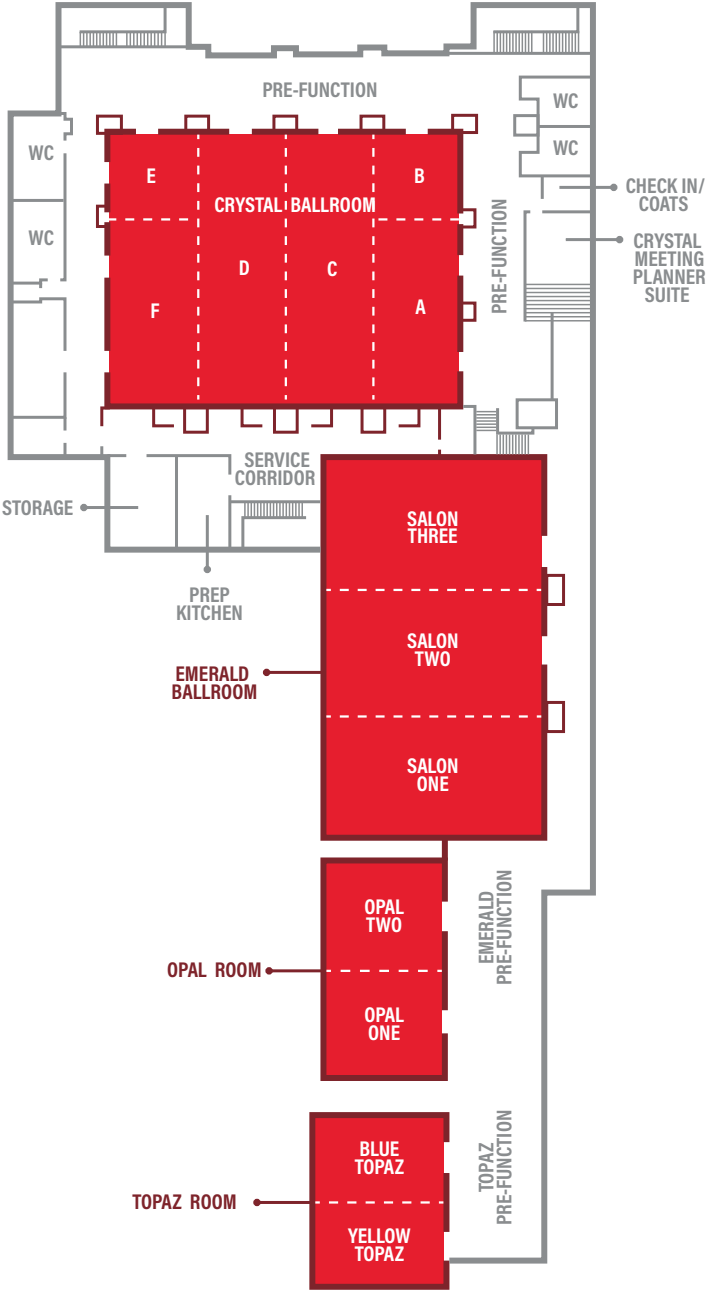
**May 8-10**

**2022  
ANNUAL MEETING**

*San Antonio, TX*

# HOTEL FLOOR PLAN

## CONVENTION CENTER & MEETING ROOMS



# GET INVOLVED

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

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



## Volunteer Info

# STAY IN TOUCH

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

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



Follow SACUBO

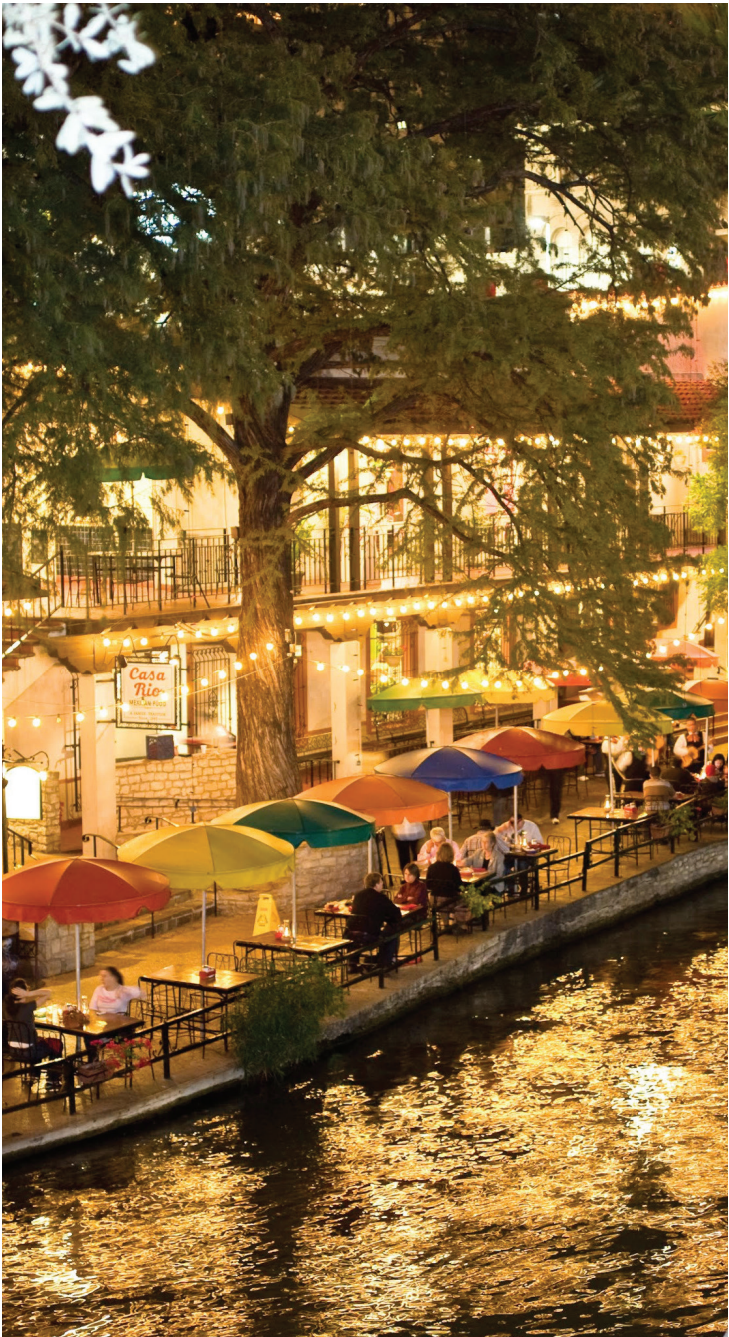


# SACUBO

SOUTHERN ASSOCIATION OF COLLEGE  
AND UNIVERSITY BUSINESS OFFICERS

## **2022 ANNUAL MEETING**

**MAY 8-10, 2022 | SAN ANTONIO, TX**



**REGISTRATION OPENS  
IN DECEMBER**