

# 2024 Returning Participants' Courses

## Budget and Planning:

### **BUD 2241 — Budgeting: Large Schools**

This course provides a general overview of budgeting at large, higher education institutions using the University of Kentucky as an example. The topics to be covered will include the basic components of operating and capital budgets, and operating budget models, development processes and lifecycle. Examples of performance funding, tuition revenue forecasting, and service assessments models for self-supporting units will be presented. Budget communications will also be covered. Class engagement will be encouraged.

Learning Objectives:

- Understand the basic components of budgeting at large, higher education institutions.
- Understand operating and capital budgets and how they intersect.
- Understand the differences between accounting and budgeting for higher education.
- Understand the lifecycle of an operating budget.
- Be able to identify various types of operating budget models.

### **BUD 2242 — Budgeting: Small Schools**

This course provides a general overview of different budgeting techniques and concepts with an emphasis on budgeting terminology that will help the participant to make relevant enhancements and recommendations to their own college budgetary process and implementation. The broad concepts included in the discussion will touch on the following: principles of operating and capital budgets, allocation decisions, and budget cycles. Various budgeting methodologies will also be covered -- incremental, formula driven, zero-based, responsibility based, and performance driven. There will also be a discussion on the linkage of strategic planning and the impact of financial ratio analysis with the budget development process.

Learning Objectives:

- Discuss the basics of budgeting
- Explore the current budget myths for small schools
- Review the various types of budgets (general)
- Explore the purpose of capital budgets
- Explore the purpose of operating budgets
- Discuss and demonstrate operating budget techniques
- Review budget forecasting and modeling
- Discuss strategic planning initiatives for small colleges
- Discuss financial reporting and use of dashboards

### **BUD 2243 — Budget Process and the Business Officer**

Budgets are a means of allocating resources to achieve the institution's strategic objectives while controlling expenditures within the institution's financial parameters. Discussion will involve the role of the business officer and the budget process in building institutional commitment, encouraging alternative scenarios for resource maximization, and reinforcing accountability. This course is intended for those involved with budgeting or planning and assumes a basic knowledge and understanding of budget systems and approaches. Prior participation in an institution's budget process at some level (central administration or departmental) will be helpful. Class discussion and participation will be encouraged.

Learning Objectives:

- Discuss the basics of budgeting and higher education.
- Identify the process, roles, and responsibilities of budgeting.
- Explore the 'politics' in budgeting.
- Identify ways to maximize resources through reallocation.
- Discuss the oversight structure and accountability through reporting aspects.
- Explore capital budgeting.

### **BUD 2246 — Strategic Budgeting: Using Analytics to Efficiently Allocate Instructional Resources**

Developing budgets too often reflects the “power of politics.” Colleges can become locked into status quo funding resulting in inefficient allocation of resources. This class identifies the key macro concepts typically involved in building a college budget. The participants will learn how to develop a budget that focuses on calculating instructional costs first. The class will calculate different hypothetical (macro) instructional budgets with a focus on changing enrollment targets and faculty productivity. Participants will also utilize actual institutional budget and faculty load data to (micro) analyze inefficiencies experienced during an actual enrollment downsize event—information useful for post Covid and recovery year budgeting. Accounting knowledge or prior budgeting experience is not a course prerequisite. Students will be solving the case studies with small group teams.

Learning Objectives:

- Participants will learn how to build a budget by first establishing instructional related assumptions related to enrollment projections—e.g., faculty productivity, projected enrollments, ratio of full and part-time faculty, etc.
- Participants will collaboratively calculate a hypothetical instruction-first budget given certain macro assumptions.
- The presenter will also guide class discussion, using actual data, to analyze how a university’s resource allocation decisions negatively impacted faculty productivity following a significant (25%) decline in enrollment.
- Discussion about how and where the university could have more efficiently allocated its instructional related resources will be encouraged.

### **BUD 2247 — Higher Education Analytics**

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.

Learning Objectives:

- Introduce participants to the different technologies that are being used to capture data, evaluate data, make decisions, and report on the information.
- Explore the different ways higher education departments are currently evaluating data.
- Challenge participants to think about other opportunities to utilize data for decision making.

### **BUD 2248 — Understanding the Budget Process in Higher Education**

This course examines the budget process as faced by colleges and universities in what is an increasingly complex educational environment. The first part discusses the context of budgeting, including its definition, the

environment, the personnel involved, and criticisms of the process. Also included in this section is a discussion of the relationship between the budget and strategic planning, and the pitfalls an organization will encounter as the budget process interacts with the people who must ultimately make the budget work. The second part discusses the budget process itself, including the development, implementation, and control of the budget. The conclusion summarizes the key points of both the budget context and the process. Summary of a number of possible budget models, and guidelines for effective budgets.

Learning Objectives:

- Be able to define the budget, the purpose of a budget and understand the types of budgets that are associated with the business of Higher Education.
- Understand the need to tie budget development to campus strategic plans.
- Understand the need for transparency with regard to how funds are generated and how they are expended.
- Understand the need to create incentives for generating new or additional sources of revenue.
- Understand the need to respond to fiscal crises such as reduced state support for higher education.
- Learn your role in the budget process.

### **BUD 2249 — Developing a Workforce for the Future Through the Budget Process**

This session will help participants identify strategies that can help to recruit faculty and staff to their institution. Participants will explore the key elements of a talent acquisition process including job design, successful visibility/advertising, identifying key elements to job markets, building deep and diverse pools for open positions, and facilitating a measurable search process. The learning experience will emphasize the importance of an effective partnership between human resources and all units across a campus.

Learning Objectives:

- Identify the elements of an effective job and salary structure.
- Identify how institutions can determine market and budget strategies utilizing data.
- Demonstrate workforce planning strategies that can integrate within a budget process.
- Demonstrate how hiring and developing early career professionals can positively impact the budget process.

### **BUD 2250 — Grants: There is NO Way Around Them -- So Embrace Them**

The course will provide a general overview of the grant process for colleges and universities. Grants provide additional funding for schools to pay for salaries, research, equipment and indirect operational activities. Many grant programs fully support an entire department but what is involved in the financial activities. What does a grant proposal entail? How do you account for the various transactions for revenue and expenditures? How do you prepare for an audit by the grantor? What are the deliverables? We will review and discuss the various activities of grants.

Learning Objectives:

- Understanding what a grant is and the various types.
- Understanding the differences between governmental and private foundation grants.
- Reading grant documents and interpreting specific language.
- Setting up grant accounting transactions (start to finish).
- Setting up grant reporting based on award guidelines.
- Getting the grant team involved with the finance team.
- Ensuring successful grant reporting.
- Closing out the grant.... and preparing for audits.

## Business:

### **BUS 2211 — Advanced Auxiliary Services**

The type of services requested by students today differs from that of their predecessors. The need to change many of the traditional services offered by campus service organizations is significant. Freedom of choice, variety and flexibility are the challenges facing today's service providers. This session focuses on the basic services offered by colleges and universities and the changes that need to occur if customer satisfaction is to be sustained. The types of changes that will be discussed include their financial benchmarks, methods of cost analysis, and financial impact.

Learning Objectives:

- Understand the evolving needs and preferences of modern students in relation to campus services, recognizing the shift towards freedom of choice, variety, and flexibility.
- Analyze the challenges facing campus service organizations in meeting the changing demands of students, including the identification of specific areas requiring adaptation or improvement.
- Develop strategies for enhancing customer satisfaction within campus service organizations through targeted adjustments to service offerings, financial benchmarks, and cost analysis methods, with a focus on meeting the diverse needs of today's students.

### **BUS 2213 — Audits**

This course will introduce participants to the modern university audit. Topics to be covered include understanding the roles and responsibilities of auditors, what every administrator should know about audits, what auditors look for to facilitate an efficient review, and effective practices for conducting self-evaluations to be prepared for an audit current best practices for managing risks over operational areas and information systems. This course will include interactive case studies and evaluations of current conditions on our campuses which present risks and recommendations for how to best mitigate those risks.

Learning Objectives:

- Understand an overview of the audit function and how to maximize the interaction with your auditors.
- Learn the elements of conducting a risk assessment.
- Be able to apply essential elements of internal control.

### **BUS 2215 — Modern Payment Systems: Evaluation, Control and Management**

Comprehensive Understanding of Modern Payment Systems and Procurement Card Risks: Objective: By the end of this course, participants will have a deep understanding of the structure and functioning of modern payment systems, with a specialized focus on procurement cards, identifying and analyzing the risks of fraud, waste, and abuse through the examination of real-world cases. This objective ensures learners grasp the broader context of modern payment systems while honing in on the specific challenges and risks associated with procurement cards.

Evaluation and Control of Risks in Payment and Procurement Systems: Objective: Participants will learn to evaluate the vulnerabilities and control breakdowns in modern payment systems, particularly procurement cards, by analyzing actual cases and applying this knowledge to develop robust program controls aimed at mitigating risks related to fraud and waste. This objective is designed to enhance learners' ability to critically assess risks and implement effective controls, combining theoretical knowledge with practical application.

Optimization and Management of Payment and Procurement Systems: Objective: By the conclusion of the course, learners will be equipped to apply best practices in the management of modern payment systems and

procurement cards, focusing on optimizing efficiency and user convenience while instituting controls that safeguard against unnecessary risks. This objective integrates knowledge from the previous objectives, empowering learners to optimize and manage payment systems, including procurement cards, effectively balancing operational efficiency, ease of use, and risk management.

These objectives aim to provide a holistic learning experience, blending insights into modern payment systems with specific expertise in managing procurement card risks, ensuring that participants are well-equipped to handle these systems' complexities and challenges.

### **BUS 2216 — Third Party Risk Management**

With more and more services being outsourced, how does a college or university manage these contracts? Certainly, it is a shared responsibility that may involve Purchasing and Legal Affairs handling the contract language and Accounting handling payments; but who is really monitoring to determine if the terms of the contract are being met if deliverables are being satisfied, if costs are being controlled, if goods and services are being rendered appropriately, and if resources are being used effectively and efficiently? Participants will leave the session with tools, techniques, and best practices for managing contracts.

Learning Objectives:

- Understand the third-party management cycle.
- Understand risks associated with third-party management.
- Learn to apply effective practices of managing third-party vendors.

### **BUS 2218 — Enterprise Risk Management (ERM) Bootcamp**

Enterprise Risk Management (ERM) has been discussed by boards, administrators, and support staff throughout higher education for several years. However, few institutions have adopted a truly integrated approach designed to enhance the identification and management of the risks they face and the opportunities which still too-often pass them by.

Learning Objectives:

- Discuss the basics of Enterprise Risk Management (ERM).
- Explore challenges and solutions to implementation of ERM program.
- Review tools to help assess ERM capabilities of the organization.
- Review ERM implementation steps for successful implementation.

### **BUS 2251 — Disaster Recovery in Higher Education**

We are not planning for every possibility that could cause an interruption; instead, we are planning for the effects of any interruption. Universities are complex and diverse organizations and face a variety of risks that can disrupt teaching, research, extension services, and healthcare. These risks can be all encompassing, localized, and personal. Man-made and natural disasters often cause property damage, loss of income, loss of life and adversely affect individuals and families and can affect universities for months, even years, after the disaster. This course will guide you through the development of University of Kentucky's Disaster Recovery & Resilience Program, emphasizing the importance of planning and fostering an environment where crisis response is likely to run more smoothly, maximum service levels are maintained, and recovery is managed efficiently and effectively. Participants will learn the mechanisms UK formulated in managing three concurrent presidentially declared FEMA natural disasters, demonstrating the challenges and successes associated with planning for the unknown. How did university leadership collaborate to ensure essential personnel were able to perform critical functions with non-traditional solutions and the resources available?

#### Learning Objectives:

- Attendees will learn approaches to business continuity and disaster recovery when faced with natural disasters of any size, shape, or form and the challenges and successes associated with planning for the unknown.
- Attendees will discover the lessons learned from the University of Kentucky's most recent natural disasters and how they caused extensive property damage, loss of income, and disruption of teaching, research, extension services, and healthcare.
- Attendees will discuss how University leadership collaborated to ensure essential personnel were able to perform critical functions with non-traditional solutions and limited resources.
- Attendees will be given the opportunity to share how others have prepared for and responded to various types of operational interruptions and the impact they brought to their campuses.
- Attendees will walk away with tools to create an environment where crisis response is likely to run more smoothly, maximum service levels are maintained, and recovery is managed efficiently and effectively.

### **BUS 2252 — Hot Topics & Trends in NCAA Compliance**

The course is designed to: a) give the participants an introduction to the history of the NCAA, b) briefly review NCAA governance and compliance structures, c) review NCAA finances and, d) review some of the current topics and trends in intercollegiate athletics. In the second part of the course, students will learn about budgeting and financial decision-making in athletics, where we will focus on decision-making within an athletics department on campus.

#### Learning Objectives:

- Learn about the History of the NCAA.
- Understand NCAA governance and compliance structures.
- Review NCAA finances.
- Discuss and identify key trends and topics in intercollegiate athletics.
- Demonstrate an understanding of budgeting and financial decision-making in intercollegiate athletics.

### **BUS 2253 — Current Hot Topics in Risk Management**

Risk Management in higher education is always evolving as new risks emerge on the horizon and begin to impact our organizations. As new risks arise and known risks are better understood, best practices for managing those risks are continuously fine-tuned by experience. This session will dive into some of the more challenging risk issues impacting colleges and universities today. Current hot topic risks include ransomware and cyber security, international travel, challenging insurance markets, protecting minors, and post-pandemic conundrums (supply chain, recruitment, remote work, etc.). Attendees will be encouraged to bring forward risk topics from their own experiences at their institutions through an open forum for discussion.

#### Learning Objectives:

- Develop an understanding of some of the more complex risk issues in higher education and the strategies for managing those risks.
- Review and understand the unique risk factors raised by the COVID-19 pandemic and how institutions are responding.
- Review risk exposures posed by ransomware and lapses in cyber security.
- Understand the risks faced during international travel by faculty and students.
- Review risk exposures associated with programs serving minors and best practices for risk mitigation and youth protection.

## **BUS 2254 — Don't Pay Twice! Indemnification, Contractual Liability, and Additional Insured**

Your institution pays consultants and contractors to do a job and be responsible for any claims that arise. Your intent is that clear and concise contract language means you are protected – you only pay once when you pay the contractor. Many consultants and contractors, and especially their counsel, try to seriously limit their responsibilities and their exposure. Learn the nuances and interaction between insurance, indemnification, and limitation of liability clauses and their impact. You will leave this session and be able to immediately identify red flags and language that is preferred or to be avoided in contracts and, most importantly, have solutions to deal with those troublesome areas. We will also discuss what insurance provisions should be required and how to deal with self-insurers. After all, if unsuccessful, you'll have to pay twice!

Learning Objectives:

- Understand different forms of indemnity and how to recognize key phrases.
- Learn how contractual liability, additional insured, waiver of subrogation, and other standard insurance terms and provisions work, what to request, and what to avoid.
- Recognize more challenging provisions and situations and how to better protect your organization.

## **BUS 2255 — Addressing Employee Needs in Higher Education: A Data-Based Future Focused Leadership Session**

The session will emphasize the importance of leadership at all levels in championing wellbeing, advocating for fair compensation, and supporting career advancement.

Participants will explore how improved compensation structures, supportive working environments, increased training and development opportunities, and affirming cultures can reshape the higher education profession, attract top talent, and ensure its relevance and impact for generations to come.

Learning Objectives:

- Understand the insights and data findings from national surveys conducted by ACUHO-I, NIRSA, SCUP, and Compass Group USA.
- Understand the key elements that are affecting hiring and retaining talent in Higher Education.
- Apply knowledge learned to create and execute strategies to positively affect future leaders in Higher Education.

## **BUS 2256 — Strengthening Business Operations Through an Innovative Mandatory Training Program**

This course will provide participants with a robust understanding of the unique business of higher education, the challenges of maintaining compliant and feasible business operations, and how the University of Kentucky approaches strengthening business operations through an innovative web-based finance and administration training program.

Learning Objectives:

- Provide an overview of the business of higher education and outline key policies, procedures, regulations, and common challenges.
- Discuss nationwide examples of business operations exploitation and impact.
- Understand the root issues driving critical gaps in higher education business practices from trends to real-world situations and establish an understanding of the three lines of defense to narrow gaps between policy, procedures, and practice.

- Outline prevention and remediation strategies – including an introduction to the initiation of University of Kentucky’s Finance and Administration Specialized Training Program (FAST).
- Understand institutional value, benefits of establishing a mandatory standardized finance and administration training program for those with business office responsibilities.
- Establish an understanding of web-based training program development based on adult learning principles utilizing institutional content subject matter experts alongside dedicated program team.
- Understand how to balance participant training needs with program requirements and compliance and learning outcomes through an efficient and flexible modality.

## Computer Information:

### **CIS 2266 — Cybersecurity in Higher Education**

This class provides practical information and guidance for higher education professionals to promote understanding of key cybersecurity concepts, the unique challenges for higher education institutions, industry trends and common tools/techniques to defend against attacks, and resources that are available to help. The class will conclude with practical tips for individuals to improve their personal cybersecurity.

Learning Objectives:

- Understand key cybersecurity controls needed to protect your institution against cyber attacks.
- Identify the common ways universities are attacked.
- Be prepared to take action to protect your personal and business accounts and data.

### **CIS 2267 — Data Privacy and Protection**

Explore legal and ethical implications of data collection and surveillance, and the needs for policy, advocacy, and privacy monitoring in higher education.

Learning Objectives:

- Recognize the limits of the collection and use of data in higher education.
- Understand data classification Identify major privacy laws and regulations.
- Identify the common concepts of privacy.

### **CIS 2268 — Navigating Global Frontiers: A Primer on International Risk Management for Business Officers**

A Primer on International Risk Management for Business Officers Description: In an era of expanding global operations within higher education institutions, effective risk management is critical. This presentation aims to equip higher education business officers with the knowledge and tools necessary to navigate the complexities of global initiatives. From international partnerships to study abroad programs and everything in between, participants will gain a foundation for identifying, assessing, and mitigating risks, ensuring the success and sustainability of their institution's global endeavors.

Learning Objectives:

- Gain a foundation for the myriad of risks presented in international educational/operations abroad.
- Review current trends and challenges associated with global operations in higher education.
- Understand the legal and regulatory frameworks impacting international operations for higher education institutions.
- Explore effective risk assessment and mitigation strategies tailored to the unique challenges faced by higher education institutions engaged in international activities.



- Develop an understanding of crisis management principles applicable to global higher education settings.

## Finance:

### **FIN 2231 — Stewardship of Gift Funds**

This course will be a review of endowment and gift funds from the accounting perspective and the development perspective. Topics include similarities and differences between endowment and gift funds, when is a gift really a gift, tax related issues, receipting and donor recognition, restricted and unrestricted funds, and recordkeeping.

Learning Objectives:

- Importance of fundraising at universities
- Understanding different types of gifts and funds
- Proper accounting for gifts
- Knowing when a gift is truly a gift including IRS rules
- Importance of donor recognition
- Difference between restricted and unrestricted gifts

### **FIN 2232 — Introduction to Capital Finance**

No experience in financing buildings, renovations and other capital assets? Not really sure how to define just what a bond is? This course will provide the basics of capital financing, introducing you to the major players in the process and the language they speak. Explore the history of bond financing in higher education and leave with a basic understanding capital budgeting, the rationale for issuing debt and the sources of capital for colleges and universities.

Learning Objectives:

- Obtain a working knowledge of the capital budgeting process and the impact of revenue pledges.
- Learn about sources of capital.
- Acquire broad knowledge of the history of bond financing in the U.S. and composition of municipal bond market.
- Gain insight into the rationale for borrowing.
- Be able to identify the major players in a bond transaction and the roles they serve.
- Build a basic vocabulary of bond finance terminology.
- Review handout of bond issuance examples.

### **FIN 2233 — Using Business Intelligence Systems to Gain Insight in Processes and Finances**

The course examines methods for using business intelligence and artificial intelligence to identify cost inefficiencies and potential abuse. The methods are risk management tools for early detection of waste, fraud and abuse as well as cost management systems.

Learning Objectives:

- Be able to explain the core concepts, technologies, and applications of Business Intelligence and Artificial Intelligence in the context of business process analysis and financial management.
- Learn the basic principles underlying BI and AI and understand how these technologies can be applied to analyze and improve business processes and financial outcomes.

- Be able to use specific BI and AI tools to analyze business and financial data, deriving actionable insights to improve decision-making.
- Be able to formulate strategies and recommendations based on insights derived from BI and AI systems to enhance business processes and financial performance.

### **FIN 2237 — Treasury Management**

Treasury management touches all parts of higher education institutions. The ability to effectively manage financial transactions and operating assets and liabilities may determine the amount of working capital available as well as the financial health of the university. Participants will gain an understanding of the fundamentals of treasury management and related topics including treasury management tools and processes, electronic payment systems, treasury analytics and workstations, the concept of an internal bank, and current challenges and regulatory issues. Participants will gain an understanding of:

- The role of treasury management within a higher educational institution
- The fundamentals of treasury management
- Treasury management tools and processes
- Electronic and card payment systems
- Treasury analytics and workstations
- The concept of an internal or central bank within the institution
- Current challenges and regulatory issues

### **FIN 2240 — Advanced Capital Financing**

A well balanced debt structure is essential to effective colleges and university business management. Issuance and effective management of debt require an intense commitment by the institution's administrative staff. This course will delve into many of the complex issues of capital financing including variable vs. fixed rate debt, credit enhancement, taxable vs. tax-exempt financing options, IRS arbitrage regulations and the effect of the subprime mortgage crisis on college and university debt. You will gain an understanding of bond covenants and their potential effect on your operating flexibility as you work through an analysis of risk vs. reward of the various types of bond issues, including off balance sheet transactions. Examples of actual transactions will be used in the course. You will leave with an enhanced knowledge of concepts necessary to successfully manage the issuance of debt for your institution.

Learning Objectives:

- Learn about the relationship between duration and interest rates.
- Be able to compute the tax-equivalent yield of a tax-exempt bond.
- Acquire an understanding of credit enhancement and its role in bond financing.
- Gain insight into the credit rating process • Obtain a working knowledge of IRS arbitrage regulations.
- Develop an understanding of bond covenants and potential effect on operations.
- Discuss alternative off-balance sheet financing structures.

### **FIN 2241 — Financial Asset and Liability Management**

Many institutions manage their financial assets without regard to the liability side of the balance sheet and vice versa. This class would take a strategic look at how to manage both sides of the balance sheet in tandem to create opportunities and efficiencies in financial performance. Topics would include cash flow forecasting, matching investments with debt, creation of an internal bank and longer term financial planning.

Learning Objectives:

- Review financial assets and liabilities of a university

- Understand the typical cash inflows and outflows
- Investment and borrowing strategies
- Concept of an internal bank
- Explore options for monetizing other university assets

### **FIN 2242 — PCI Compliance**

This course will provide you with an overview of accepting credit cards and other payments on campus, as well as the challenges of complying with the Payment Card Industry Data Security Standards (PCI DSS). Discussion will include what is PCIDSS and from where did it come, what is required for compliance, and introduction of a roadmap to get your campus in compliance with the standards.

Learning Objectives:

- Learn what is PCI DSS, its origin, and why it is important to comply with the standards.
- Learn about the requirements that make up PCI DSS.
- Students will be presented a “Compliance Roadmap” to help with development of their compliance program.
- Learn about technologies that will enhance the security of card data and reduce the overall scope of PCI DSS compliance.
- Introduction to the new requirements in PCI DSS version 4.0.

### **FIN 2243 — Using Financial Ratios to Assess Institutional Financial Health**

This session combines lecture with hands-on experience focused on financial ratio assessment for colleges and universities. Following a presentation on the critical elements of higher education financial ratio analysis, with particular emphasis on the Composite Financial Index (CFI), participants will measure their institution’s financial health utilizing the audited financial statements the students will provide. Using digital templates provided for the session, and guided by the presenter/facilitator, they will examine their financial statements to find key financial elements necessary for calculating the four key ratios comprising the CFI. After participants have calculated one year’s CFI, the results will be diagnosed. Time permitting, participants will calculate additional years’ ratios and emerging trends will be examined. Accounting expertise/ experience is not required for this session. Participants are required to bring a laptop or tablet and two years of audited financial statements—preferably in hardcopy format. Those from public institutions should bring the corresponding audited financial statements for their foundation(s).

Learning Objectives:

- Participants will be able to recognize the key financial elements that influence financial health.
- Participants will be able to assess their institution’s financial health using the Composite Financial Index.
- Participants will be able to engage in conversation about their institution’s financial health and compare it to other institutions’ financial health.

### **FIN 2244 — Alignment of Planning Resource Management and Assessment**

Institutions achieve improved effectiveness by integrating strategic, infrastructural, and operational planning throughout the organization. Once operating plans exist, they can be aligned with resource allocation and assessment. Plans establish what is to be done. Resources enable the plans to be executed. Assessment monitors progress along the way and identifies success. Participants will learn about these three critical processes, and their component activities, while discovering key aspects of the collaboration needed to support

institutional success. During the session, participants will engage in two small-group activities to (1) identify key campus stakeholders and (2) develop an inventory of required infrastructural plans.

Learning Objectives:

- Participants will be able to engage in the various planning processes operating on their campus.
- Participants will be able to diagnose the budget model used on their campus and apply the information to operate more effectively within the model.
- Participants will be able to identify appropriate performance measures for the activities in which they participate.

### **FIN 2246 — Fundamentals of Operating Investments**

The objectives in managing higher education operating investments are safety, liquidity, and return, in that order. The treasury manager must choose from a variety of short-term investment products and vehicles. An effective operating investment program should be guided by the institution's investment policies, the liquidity needed by the organization, the levels of operating cash invested, and the institution's risk tolerance in the current environment. Participants should gain an understanding of all these tenets in managing this important resource in their organization.

Learning Objectives:

- The objectives and characteristics of operating fund portfolios in higher education.
- Operating fund investment options and risk considerations.
- The importance of performing a liquidity review to define liquidity tiers and establish the appropriate asset allocation for each tier.
- Key requirements of an operating investment policy.
- Current challenges of managing operating investment portfolios

### **FIN 2247 — Fundamentals of Endowment Investments**

The primary goals of endowment funds in higher education are to provide a perpetual source of income and a stable, reliable income stream. This session will provide an overview of how higher education entities invest and develop endowment investment policies to achieve these goals. Our discussion will focus on the purpose, policies, and execution of managing a diversified endowment portfolio with a long-term growth objective designed to achieve intergenerational equity. We will also look at the different endowment spending rules used by universities.

Learning Objectives:

- The objectives and characteristics of endowment fund portfolios in higher education
- External pressures and common misperceptions regarding higher education endowments
- Key investment principles of the endowment model and the concept of intergenerational equity
- Key requirements of an endowment investment policy
- Asset classes and alternative investments
- Endowment spending policies
- Management structures/models
- Current challenges and trends in managing endowment fund portfolios

### **FIN 2248 — Current Issues & Trends in Strategic Treasury Management**

This course is the final course in the Treasury Track series and will provide participants with insights on current issues and trends in treasury management from a seasoned financial services professional that serves higher education institutions.

Learning Objectives:

- Recent and future treasury management priorities
- Future strategic themes for treasury management
- The current operating environment for treasury management and top-of-mind trends
- Evolution of the payments landscape
- Cybersecurity and fraud
- Artificial intelligence and other technologies driving treasury transformation
- Shifting treasury from operational to strategic relevance
- Tools for identifying treasury transformation opportunities

### **FIN 2249 — How to Get Away with Procurement**

Historically procurement has been viewed as a hoop or a hurdle to be avoided at all costs. Unfortunately, in many cases this label was well earned.

But it does not have to be that way. A modern best practice procurement office focuses on problem solving in partnership with their campus customers. It is a toolbox to be utilized to meet the needs of the university in support of its mission.

This course will take you step by step through the entire procurement process and identify how work can be accomplished in a manner that is compliant while minimizing or eliminating the hassles traditionally endured during the procurement process. It can be done-this course will provide information on how to achieve this end utilizing real world problems as case studies to frame the conversation.

Learning Objectives:

- Understand the role Procurement plays in helping their customers receive the results they desire.
- Understand the process and the key inputs required to make the procurement process efficient, compliant and results oriented.
- Understand partnership strategies that can be developed and utilized to ensure compliance and accountability that designed to achieve on-going excellence.

### **Higher Education Administration:**

#### **HED 2224 — Cross-Cultural Leadership: Navigating Generational Dynamics in the Modern Workplace**

The work environment is changing rapidly. Successful managers need to develop leadership skills that will effectively motivate and retain today's employees.

Participants will obtain insights to improve mentoring skills and employee motivational strategies. Concepts will be introduced that can be used to support employees that have different generational workplace preferences, unique needs related to communication and recognition, and differing career path expectations. Following a brief overview covering the evolution of management theories, the participants will complete several self-assessment managerial behavior surveys including the McGregor (X – Y) test, Ohio Grid self-assessment and the popular “Big-5” personality appraisal. The self-assessment questionnaires will help participants understand how their preferred supervisory approach can best impact their work environment. The presentation will culminate with an explanation about how understanding a college's culture is important when implementing organizational change initiatives. This section will complement the leadership behavior skills information presented in the “Why I Like You, Why I Don't” class.

Learning Objectives:

- This class will help new and experienced managers learn how to motivate and retain employees in a changing and diverse work environment.
- Focus on the generational and cultural diversity and expectations of employees in the workplace.
- Participants will complete several self-assessment questionnaires (including the "Big 5" profile) to achieve an understanding of how their preferred supervisor style may impact employee motivation and their work-place satisfaction.

### **HED 2225 — Current Legal Issues in Higher Education**

This course will highlight the legal issues pertinent to college and university business officers. We will discuss the areas where potential liability for institutions may be the highest and the significant compliance obligations for an institution. In addition, we'll discuss how to best engage your campus legal offices so that they can be most effective in assisting you in navigating the legal landscape.

Learning Objectives:

- Gain a general understanding of the breadth of legal issues impacting higher education institutions.
- Better understand some of the current hot button higher education legal issues.
- How to best engage with your campus legal staff.

### **HED 2288 — Fraud/Ethics**

This session will provide the participant examples of the types of fraudulent activities occurring in higher education financial operations and prevention techniques minimizing the financial and reputational risk to the institution using internal controls and establishing ethical expectations through ethical decision-making practices.

Learning Objectives:

- Define ethics and fraud.
- Identify the nine principles of an ethical institution.
- Identify the five components of ethical decision making.
- Identify the principles of a CPA's ethical code of conduct.
- Establish an ethical "tone at the top."
- Discuss the financial and reputational cost of fraud to the university.
- Identify the "fraud tree" and types of occupational fraud committed in a university setting.
- Incorporate the use of the "fraud triangle" as a basis for prevention and deterrence of fraud.
- Establish internal controls as prevention techniques.
- Identify the characteristics and red-flag behaviors that signal potentially fraudulent activities.

### **HED 2290 — A Foundation in Facilities**

Increasingly Institutions are battered by tight budgets and overwhelming financial challenges. While they have in response aggressively managed revenue, financial portfolios and endowments they have traditionally only considered Facilities a cost to be contained. However, Facilities are worth more than all other financial resources combined. This course will re-examine those traditional approaches, giving information and tools to assertively orient Facilities in "A New Framework", as Financial Resources and professional Team focused on enhancing the Student Experience, a vital contributor towards the Strategic mission. This course will include information on overall Facilities while also including specifics on Custodial, Maintenance and Landscape Benchmarks, Facilities Financial parameters and Facilities KPIs. Using that information, we will also re-examine

conventional Campus Master Planning, moving away from unrealistic "Beautiful Wish List Images". We will discuss alternate approaches and tools that incorporate Institution Strategic Plans, Academic/Research Goals, massive Deferred Maintenance/Capital Renewal backlogs and rising Facilities Maintenance and Operating needs into more Sustainable, Fundable, achievable Mission focused Facilities and Facilities Teams.

Learning Objectives:

- Provide education facilities management parameters.
- Provide facilities general operating instructions and key KPIs.
- Discuss new campus university and facilities strategic frameworks.
- Provide approaches to collaboration and enhanced facilities campus support.

### **HED 2293 — Change Management**

Change is ever present these days and often required changes aren't optional. Administrators struggle with "getting buy in" with system and process changes. This session provides a framework for managing change on campus. Participants will hear a change management leader talk about the steps of change management, coupled with real life examples from experience on campus. Course content includes the value of change management, key players/roles to identify to ensure successful change, and a model with specific phases identified.

Learning Objectives:

- Understand the value and steps of a change management plan.
- Be able to identify key players/roles to ensure successful change.
- Learn about models used with specific phases identified.

### **Personnel, Benefits, and Staff Relations:**

#### **PER 2252 — Contemporary Human Resources Practices**

This will be an interactive session designed to provide an overview of contemporary issues in human resources across institutions of higher education. Participants will review trends and challenges in developing proactive human resource practices. Successful efforts will be reviewed in areas of policies, practices and techniques. Special attention will be given to the areas of HR information systems, retention strategies, change management, leadership development, and integrated health care management. Participants will review a systematic process for identifying human priorities at their respective institutions. Resources for action planning will be provided.

Learning Objectives:

- Participants will identify, review, and analyze trends and challenges in developing proactive human resource practices.
- Individuals will identify effective HR policies, practices, and information systems including integrated health care management on a college campus.
- Participants will review retention strategies for college and university faculty and staff.
- Individuals will identify the significance of change management and leadership development practices in an institution.

#### **PER 2258 — Learning to Think With More Than One Hat**

The kind of thinking that goes on in many organizations is often based on a model that is filled with confusion because we "try to do too much at once." We might even say that the way most of us have learned to think is

outdated; we need a different approach to thinking. Instead, we need to learn how to become “parallel thinkers.” What’s a parallel thinker, you ask? Come to the session and learn this innovative but simple approach to thinking, decision making, and problem solving. You will be challenged to put on not just one thinking hat but six. But you say, “I don’t have six thinking hats.” You will when you leave the session.

In this session participants will:

- Learn a different approach to thinking known as "The Six Thinking Hats".
- Review the primary influences that have shaped western thinking and understand how this has influenced the way in which we have learned to think.
- Be able to identify each of the six thinking hats and how they correspond to a particular style or approach to thinking.
- Join in a mock scenario, where participants will get to "try on" the hats and share their reactions about the experience.
- Understand the advantages of the six thinking hats model and review ways it might be employed in the participants' own organizations.

### **PER 2286 — Understanding Communication Styles**

When working with a team, it is important to realize that we all communicate differently but it is those differences that allow us to grow and learn from one another. This course will assist participants with communication and collaboration. Through self reflection, faculty will lead participants through their core values and personal communication styles.

After this course, participants will

- Comprehend their personal communication style.
- Match their communication style to that of others.
- Understand strengths and challenges of other communication styles.

### **PER 2288 — I.D.E.A.: Understanding Your Role in Advancing Diversity and Equity**

This course empowers participants to become effective equity advocates within their roles. By honing skills in communication, collaboration, and allyship, they learn to foster inclusive environments where every voice is valued. Through interactive discussions and collaborative activities, providing the knowledge, skills, and inspiration needed to cultivate a culture of equity, justice, and inclusion. Whether a seasoned leader or emerging professional, participants will gain the tools to enact meaningful change within their organizations and communities.

Learning Objectives:

- Examine & understand the social identities they hold and how those identities impact the lens they use to navigate the world.
- Explore concepts of equity, justice, and inclusive excellence via case studies.
- Identify ways to be an equity advocate within their institutional or team role.

### **PER 2290 — Supervising with a Mental Health Mindset**

In this course, we will tackle the subject of mental health head on, with reverence, humor, and interaction. Through sharing personal stories and anonymously sharing our own experiences with mental health events, we will create an understanding of the issue and co-create the ideal supervisor and supervisor behaviors. This 2-hour course will incorporate the latest research around mental health, lessons from the pandemic, and workshop activities that allow participants to leave with a clear plan to supervise with a mental health mindset.

Learning Objectives:



- Participants will understand the relevance and impact of mental health in higher education leadership to support effective business practices in colleges and universities.
- Participants will explore how a mental health-informed approach can contribute to the overall well-being of staff, faculty, and students within the higher education context.
- Participants will co-create a model of the ideal supervisor and supervisor behaviors that align with the unique challenges and dynamics of business administration within academic institutions.
- Participants will develop practical strategies informed by the latest research and lessons from the pandemic to promote mental well-being specifically.
- Participants will explore and discuss supervisor behaviors that foster a positive workplace culture.

### **PER 2291 — Building Your Team Through Emotional Intelligence**

Participants in this 2-hour course will learn how to use emotional intelligence (EI) to build trust, community, and productivity on their teams. We will explore what makes "toxic" team members "toxic," what makes the ideal team member "ideal", and how to create the cohesive team. We will follow a recipe full of self-reflection and co-creation. Participants will leave with the beginnings of plan to implement to boost their teams' EI to further bolster their team dynamics.

Learning Objectives:

- Participants will be able to define and explain the key components of emotional intelligence (EI), including self-awareness, self-regulation, motivation, empathy, and social skills.
- Participants will demonstrate an understanding of how each component contributes to building trust, fostering a sense of community, and improving overall team productivity.
- Participants will be able to recognize and analyze behaviors indicative of toxic team dynamics within their own teams.
- Participants will develop skills to address and mitigate toxic behaviors by applying emotional intelligence principles, fostering a healthier team environment.
- Participants will engage in self-reflection to identify their own strengths and areas for improvement in emotional intelligence. Supervising with a Mental Health Mindset
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- Participants will explore and discuss supervisor behaviors that foster a positive workplace culture.

### **PER 2292 — Rethinking Workplace Conflicts and How to Respond to Them**

Research confirms the devastating impacts of unresolved conflict on employee wellbeing, engagement, intentions to quit, and many other factors, which are exacerbated by undue reliance on traditional HR grievance processes that further traumatize employees. This session presents a framework for rethinking traditional conflict management approaches and developing different approaches that are more responsive to employee needs. This involves building conflict capability and represents the best opportunity for the organization to manage and respond to conflict situations and keep them from escalating. This session presents approaches

that help employees understand their differences, improve communication, achieve reconciliation, and determine for themselves the best outcomes for returning to productive working relationships.

Learning Objectives:

- Overview how unresolved conflicts and traditional processes for responding to them adversely affect productivity, morale, performance, and employee wellbeing, among other factors.
- Consider a framework for building workforce conflict capability, including strategies for fostering a civil work environment, developing skills to address interpersonal conflict, and providing third-party assistance such as informal mediation.
- Explore how and why these strategies holistically promote employee wellbeing and offer better opportunities for authentic conflict resolution than traditional grievance processes.
- Evaluate institutional responses to workplace conflict beyond traditional grievance practices, such as utilizing a conflict resolution office, ombuds, or DEI or other office with expertise with addressing conflicts informally.
- Engage in brief experiential learning activities for building conflict capability, such as listening, engaging in difficult conversations, and mediating interpersonal conflicts.

### **PER 2293 — How to Say No**

It can be difficult to say no to a Dean or Provost, even if you know they are breaking a policy or are going over budget. Business Officers are expected to uphold the integrity of their schools financials and policies, yet please upper management at the same time, which can be two separate things. In addition, Business Officers are busy people. We often are pulled in many different directions at once, and often times are asked to do things that are not financial. Sometimes there just aren't enough hours in day to do what our supervisors request. How to Say No is a discussion based course that gives participants the confidence to say no to persons in authority in their institutions.

Learning Objectives:

- Identify when and how to say no
- Understand how to build trust so that no is heard
- Master how to have a difficult conversation

### **PER 2294 — Build a Process to Successfully Recruit Talent to Your Institution**

This session will help participants identify strategies that can help to recruit faculty and staff to their institution. Participants will explore the key elements of a talent acquisition process including job design, successful visibility/advertising, identifying key elements to job markets, building deep and diverse pools for open positions, and facilitating a measurable search process. The learning experience will emphasize the importance of an effective partnership between human resources and all units across a campus.

Learning Objectives:

- Identify the elements of a successful talent recruitment process.
- Identify the tools and processes of an effective talent acquisition approach.
- Identify the value of a focus on diversity and inclusion during recruitment.
- Demonstrate the necessity of a strong partnership between human resources and hiring departments.

### **PER 2295 — Building Institutional Resilience: The Crucial Role of Business Officers in Higher Education**

In an era marked by unprecedented challenges and uncertainties, the resilience of higher education institutions has become paramount. This presentation aims to empower business officers in higher education with the

knowledge and strategies essential for building and sustaining resilient institutions. Through a comprehensive exploration of key principles and practical insights, participants will gain a deeper understanding of their pivotal role in steering their institutions through dynamic landscapes and emerging stronger from adversity.

Learning Objectives:

- Understand the key factors that contribute to the resilience of an institution.
- Discuss the business officer's role in fostering and identify areas where business officers can proactively contribute to
- institutional resilience.
- Discuss financial management practices that enhance institutional resilience.
- Understand the importance of risk assessment and mitigation in building resilience.

### **PER 2296 — I am Unstoppable Because**

In this empowering presentation, we will explore the concept of "You Are Unstoppable Because." Unveiling the keys to unlocking your true potential, the session aims to inspire and equip participants with the mindset and tools necessary to overcome obstacles and achieve personal and professional success.

This presentation is designed to empower individuals to recognize and embrace their unstoppable potential, providing practical tools and insights to propel them towards a future of achievement and fulfillment. Come prepared to leave with your BAAG (Big Ass Audacious Goals) mapped out and your own Unstoppable Statement.

Learning Objectives:

- **Understanding Your Inner Strength:** Discover the untapped reservoirs of strength within yourself. Learn to recognize and leverage your unique abilities and talents.
- **Mastering the Mindset of Resilience:** Gain insights into cultivating a resilient mindset in the face of challenges. Develop strategies to bounce back from setbacks stronger than ever before.
- **Harnessing the Power of Positive Affirmations:** Draft your I Am Unstoppable Statement. Explore the impact of positive self-talk on your confidence and performance. Learn how to integrate affirmations into your daily routine for lasting positive change.
- **Setting and Achieving Ambitious Goals:** BAAG (Big Ass Audacious Goals) Uncover the secrets of effective goal setting for personal and professional success. Receive practical tips on breaking down goals into manageable steps and staying motivated.
- **Building a Supportive Environment:** Understand the importance of surrounding yourself with positivity and encouragement. Learn how to cultivate a network of support that propels you toward your aspirations.

### **PER 2297 — Strategies for Creating, Developing and Leading Productive Remote Teams**

The pandemic changed all aspects of leadership. The world as we once knew no longer exists. Many went from sitting in traffic each day while driving to the office to creating workspace at home, scheduling zoom calls, and trying to figure out ways to develop productive remote work staff. In this course you will learn how to overcome common challenges faced by remote teams, enhance their leadership capabilities in a virtual environment, and drive teams towards achieving exceptional results. It will cover numerous critical thinking proficiencies and effective decision analysis needed to lead a remote work team and dive into key areas such as fostering a culture of trust and accountability, leveraging technology for efficient communication and collaboration, and implementing best practices for remote team engagement and productivity.

Learning Objectives:

- Identify and overcome the common challenges associated with leading remote teams and fostering team cohesion in a remote work environment.

- Enhance remote work leadership skills, including the development of critical thinking abilities and decision-making strategies.
- Foster a culture of trust, accountability, transparency, and clear expectations.
- Implement strategies for engaging team members, enhancing productivity, setting clear goals, providing continuous feedback, and recognizing and celebrating achievements.
- Leverage technology to facilitate efficient communication and collaboration among team members, including choosing the right tools and establishing best practices for their use.

## 2024 Refresher Only Courses

### **REF 3000 — Refresher Only Roundtable Discussion: Strategic Partnerships**

This will be a time for a group conversation around the pivotal role of strategic partnerships and business collaborations within the landscape of higher education. Participants will gain a deep understanding of the fundamental structures and operations that underpin higher education institutions, with a special focus on how strategic alliances can elevate these frameworks to new heights of efficiency and effectiveness.

Learning Objectives:

- Participants will delve into the essential structure and dynamics of higher education operations, highlighting the critical role of strategic partnerships and business collaborations.
- Participants will pinpoint and examine primary support areas where strategic alliances with business partners can substantially improve outcomes.
- Participants will engage in discourse on the significant influence that strategic collaborations between educational institutions and business entities can have, emphasizing joint ventures and shared initiatives.

### **REF 3001 — Refresher Only Roundtable Discussion: Unpacking Political Dimensions in Higher Education**

The refresher course brings us full circle to discussing the overall activities within a college/university setting. Who are the players and how do we all interact. Who do you talk to or should you not? How much can be said at what level? Engage in a full discussion of various college activities and see how your peers have responded and what the consequences were. Areas topics may include but are not limited to: Cost Allocations, unions, Faculty, Boards, Systems, Senior Management, Reimbursements, Athletics, and more.

Learning Objectives:

- Discuss relationships between Intra / Inter Departmental politics
- Discuss the relationships between Union / non-union staff
- Explore the relationships between Senior Staff and BOD/BOT
- Explore the differences in systems versus single enterprise schools
- Discuss how it "all works together"

### **REF 3002 — Refresher Only Roundtable Discussion: Leveraging CBMI for Institutional Success**

The session will be an open, collaborative discussion amongst attendees regarding their experiences at CBMI, how it impacted them and their careers, and how they applied what they learned at CBMI once they returned to their campuses.

Learning Objectives:

- Students will learn how others utilized skills learned at CBMI within their careers
- Students will be given ideas on how to others have applied knowledge and processes learned at CBMI to impact their campuses
- Students will have the opportunity to express what they love about CBMI and give opinions for opportunities to improve the program for future attendees