

# 2025 Returning Participant 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. Topics to be covered 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.

#### 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
- 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**

The class participant teams will use data assumptions that focuses on calculated instructional costs to create a college (macro) instructional budget. The instructional-first budget development process promotes rational discussions about:

- Instructional efficiencies,
- the actual cost of setting enrollment targets including growth or reduction scenarios
- whether supporting activities can be adequately funded after finalizing the academic enrollment priorities.

By utilizing actual university data following a significant decline in enrollment, participants will use a case study approach to analyze the institution's resulting faculty load and operational cost efficiencies. This class will be especially valuable for students desiring to compare their college's pre and post Covid academic operating efficiencies. Whether directly involved in the budget development process, or just want to learn about budget related strategies, this class will provide participants an analytical model for evaluating the funding priorities of a college. This class does not require experiences in accounting or institutional budgeting.

#### Learning Objectives:

- Understand how a budgeting process model can use data to create a rational as opposed to a politically motivated college budget.
- The participants will be able to strategically develop a data-driven academic cost/budget.
- How to use data for evaluating departmental instructional efficiencies--case study exercise is particularly relevant in the post covid environment.
- How to guide their institution's efforts to strategically and more efficiently allocate finite resources.

### **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:

- Familiarize participants with various technologies used for data collection, evaluation, decision-making, and reporting.
- Examine current data evaluation methods used by higher education departments.
- Inspire participants to explore innovative ways to leverage data for informed 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**

Auxiliary services are essential components that support the primary educational mission by enhancing the overall campus experience for students, faculty, and staff. These services include, but are not limited to, housing and residential life, dining services, campus bookstores, transportation, health and wellness centers, and recreational facilities. This session will focus on the critical role that auxiliary services play in higher education institutions, the growing challenges these services face, and effective strategies for professionals to communicate their value and enhance customer satisfaction.

#### Learning Objectives:

- Develop a thorough understanding of the significant impact that auxiliary services have on higher education institutions. Recognize how these services contribute to student satisfaction, retention, and the overall campus experience.
- Gain insights into the growing challenges faced by auxiliary services, such as budget constraints, changing student demographics, and technological advancements. Learn effective strategies to address these challenges, ensuring the sustainability and efficiency of auxiliary services.
- Understanding the role of visual storytelling in engaging audiences and conveying impactful stories. Learn techniques for measuring and highlighting the impact of auxiliary services. Develop strategies to enhance customer satisfaction and create a positive campus experience.

### **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 2216 — Third Party Risk Management (*Treasury Track*)**

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 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 (*Treasury Track*)**

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.

## **BUS 2257 — Advanced Knowledge of Facilities Management**

FM is a key contributor to the advancement of the academic mission and research enterprise within universities. FM plays an integral role in not only the health and functionality of the campus, but retention, recruitment and donor relations. This course is designed to provide an advanced understanding of FM and the required disciplines to be a successful and supportive division of any campus. Working collaboratively with other departments, a successful FM organization should provide transparency, accountability and real-world solutions for end users. This interactive session will lead participants through a model of operational exercise that outlines facilities and asset stewardship; finance, accounting and budget modeling; building and maintaining alliances along with a snapshot of the campus of the future. Participants will walk away with an advanced understanding of the overall concept of functionality of an FM division, along with how they can create alliances and collaborative relationships to make the campus community as a whole successful in the advancement of an academic and research environment.

### Learning Objectives:

- Creating a culture of Campus Asset Stewardship and Accountability
- Money Talks - The Power of Budgeting and Financial Management
- It's all About Relationships: Partnerships Across Campus and Beyond
- Communication, Communication & Communication
- Campus of the Future: Preparing for Takeoff
- The People In FM
- The FM Cardiac Care

## **BUS 2258 — Data-Driven Storytelling: Creating Engaging and Informative Presentations**

In this course, students will discover how to effectively use data and visualizations to create an impactful message through storytelling. This course will provide a practical framework for planning, designing, and implementing data-fueled presentations and/or reports. Students improve their visual communication and data visualization skills. This course will NOT show you how to use a specific data visualization tool to create a chart or data dashboard. This course WILL show you how to develop a narrative, incorporate techniques that engage your audience, integrate data stories, and finally present those stories in your presentations.

### Audience:

This course is ideal for professionals in higher education, business, marketing, and other fields who want to enhance their ability to communicate data-driven insights through compelling stories.

Participants will leave with practical skills to create impactful data presentations that engage and inform their audience.

### Prerequisites:

1. Basic Understanding of Data: Participants should have a foundational knowledge of data concepts, such as data types, data collection methods (surveys, existing data sources, or interviews), and basic data analysis techniques (summarizing data using measures such as average or count or creating simple charts).

2. Experience with Presentation Tools: Participants should have some experience using presentation tools (e.g., PowerPoint, Google Slides) to create and deliver presentations.

No Prior Knowledge Required:

1. Specific Data Visualization Tools: Participants do not need to know how to use specific data visualization tools (e.g., Tableau, Power BI) as the course will not cover tool-specific instructions.
2. Advanced Data Analysis Techniques: Participants do not need to have advanced data analysis skills or experience with complex statistical methods.
3. Storytelling Techniques: No prior experience with storytelling techniques is required, as the course will cover how to develop and present data narratives effectively.

Learning Objectives:

- Explain the challenges, and opportunities of visual communication
- Identify your audience and engage them through compelling numbers and narratives
- Construct a narrative and craft a clear storyline
- Implement the VISTA approach (visualize, identify, structure, tailor, align)
  - Visualize: Create your visualizations.
  - Identify: Select the most relevant data and visuals.
  - Structure: Organize your visualizations effectively.
  - Tailor: Customize your visuals to fit your narrative.
  - Align: Ensure your visuals align with your overall message.
- Create a presentation deck showing key findings and recommendations

## **BUS 2259 — Payment Systems Today and in the Future**

The course, presented in two parts, offers a comprehensive exploration of key payments topics, designed to enhance participants' understanding of modern banking practices and cash flow management. The agenda begins with an overview of client and personal cash flow dynamics, including emerging payment trends. Participants will gain insights into receivables management, covering essential areas such as cash handling, check image deposits, merchant services, and electronic receivables with an emphasis on how they are applicable to the higher education industry. The program also delves into liquidity management strategies, such as automated cash sweeping and investment options to optimize financial resources.

In the latter part of the program, attendees will explore payables management, focusing on various payment methods, real-time payments, and the payables continuum. The session on connectivity will highlight organization/bank connectivity and portal offerings, providing a glimpse into the future of banking interactions. The session concludes with closing remarks, summarizing key takeaways and reinforcing the practical applications of the topics discussed for higher education financial professionals.

Learning Objectives:

- Enhance Cash Flow Management Skills: Participants will develop a comprehensive understanding of client and institutional cash flow dynamics, including emerging payment trends within a higher education context.
- Gain understanding of Receivables and Payables Management: Attendees will gain an understanding of receivables and payables, focusing on cash handling, check image deposits, merchant services, ACH transactions, and real-time payments with most common solutions used in higher education identified.
- Learn Effective Liquidity Management Strategies: Finance professionals will acquire the knowledge to explore and utilize various liquidity management strategies, including cash sweeping and investment options looking at common approaches in higher education.

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

In an era of expanding global operations within higher education institutions, effective risk management is paramount. 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, participants will gain insights into identifying, assessing, and mitigating risks, ensuring the success and sustainability of their institution's global endeavors.

#### Learning Objectives:

- Gain insight into the current trends and challenges associated with global operations in higher education.
- Explore effective risk assessment and mitigation strategies tailored to the unique challenges faced by higher education institutions engaged in international activities.
- Understand the legal and regulatory frameworks impacting international operations for higher education institutions.
- Develop an understanding of crisis management principles applicable to global higher education settings.
- Explore strategies for establishing and maintaining successful international partnerships while managing associated risks.

### **CIS 2269 — Managing AI Risk in Higher Ed Environments: A Comprehensive Approach**

This session focuses on managing AI risks and opportunities in colleges and universities, where rapid AI advancements intersect with education and operations. We'll review strategies for addressing AI-related challenges such as bias, privacy breaches, and unforeseen consequences while also exploring how AI can enhance data analysis, operational efficiencies, and overall productivity. Highlighting policy development, technical safeguards, and regulatory navigation, our goal is to provide colleges and universities with a comprehensive approach to both mitigate AI risks and capitalize on its benefits. This session is ideal for stakeholders looking to balance AI integration with safety, ethics, and institutional success.

#### Learning Objectives:

- Discover ways to develop responsible AI policies and governance
- Learn about the cybersecurity issues involving AI
- Understand how to navigate the regulatory landscape for AI
- Develop methods for fostering collaboration for AI risk management
- Explore how AI can drive operational efficiencies and enhance decision-making
- Review specific risk statements that can be incorporated into your institution's ERM program

## 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** *(Treasury Track)*

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 2235 — Fundamentals of Higher Education Investments** *(Treasury Track)*

This course will provide an overview of operating and endowment investments programs in higher education, exploring the unique objectives and characteristics of the two different programs. Participants should gain a high-level understanding of the fundamental elements of each program, the key requirements of the related investment policies, and the current challenges of managing operating and endowment portfolios.

#### Learning Objectives:

- The objectives and characteristics of operating and endowment 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 investment principles of the endowment model and the concept of intergenerational equity
- Endowment spending policies
- Endowment management structures/models
- Key requirements of an operating and endowment investment policies
- Current challenges of managing operating and endowment investment portfolios.

### **FIN 2237 — Treasury Management** *(Treasury Track)*

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.

#### Learning Objectives:

- 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** *(Treasury Track)*

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 2242 — PCI Compliance and Trends in Higher Education Payments** *(Treasury Track)*

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 2248 — Current Issues & Trends in Strategic Treasury Management (*Treasury Track*)**

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:

- The current operating environment for treasury management and top-of-mind trends
- Fortifying payment strategies
- Elements of the modernization imperative
- Commerce (R) evolution: Embedded banking, Omnichannel and Emerging Payment Rails
- Treasury technology supporting AR and AP
- Cybersecurity and fraud
- AI driving treasury transformation
- Future strategic themes for treasury management

### **FIN 2249 — Procurement - Driving Organizational Value**

In the presentation audience members will be engaged to understand the critical role the Procurement Office plays in helping to support the strategic direction of their organization.

Participants will be provided a high-level review of the procurement methods and engage in case study exercise to better understand the benefits and strategies to optimize and create greater value in their outcomes.

Drawing on national best practices, participants will be engaged in discussion that provides a framework of real examples that will allow them to begin taking steps towards driving greater value. From meeting your strategic

sourcing needs, driving value generation in the form of cost savings and value-added awards, to category management, demand planning and importance of effective communications.

Learning Objectives:

- Differentiate the four basic types of procurement and value they provide
- Identify procurement strategies that can be tried in your own organization
- Understand how the procurement process can better align to drive organizational value

**FIN 2250 — Asset/Liability Management and Long-Term Planning** (*Treasury Track*)

Many institutions manage financial assets without regard to the liability side of the balance sheet. This class focuses on the importance of managing both sides of the balance sheet in tandem to create opportunities and efficiencies in financial performance. Topics include the importance of asset/liability management, cash flow forecasting, aligning investments with debt, internal bank creation & management, and long-term financial planning.

Learning Objectives:

- Understand the implications of poor financial management
- Review of financial assets and liabilities
- Understand cash flow details
- Concept of an internal bank
- Monetizing university assets
- Investment and borrowing strategies

Higher Education Administration:

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

Part I: Participants will obtain insights to improve generational oriented motivating skills and employee retention 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.

Part II: Following a brief overview covering the evolution of management-employee theories, the participants will complete several self-assessment managerial behavior surveys including the McGregor (X – Y) self-assessment test, the Ohio Grid model and the popular “Big-5” personality profile. The self-assessment questionnaires will help participants understand how their preferred supervisory approach impacts their multi-generational college environments.

The presentation will culminate with an overview of the importance of successfully linking a leader’s style to a college’s culture when implementing organizational change initiatives.

Learning Objectives:

- Managers will learn about the issues, desires and dynamics surrounding the multi-generation workforce.
- This program will give managers insight and leadership skills to better motivate and retain employees.
- Participants, by completing several self-assessment questionnaires, will learn how their preferred supervisor style may impact employees’ motivation and work-place satisfaction.
- Students will learn how to match/adjust leadership styles to their organization’s culture when implementing change initiatives that can impact employee motivation and commitment.

## **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**

The fraud section is designed to discuss fraud issues in higher education. Participants will be presented with relevant and real-life situations related to fraudulent activities. The session will also review findings from the most recent findings from the Association of Certified Fraud Examiners' Report to the Nation on Occupational Fraud and Abuse. Topics will include how to detect fraud in a college environment, the cost of fraud, evaluation of potential fraud "hot spots," and proactive and reactive approaches to fraudulent activities. Participants will leave the course with an awareness of fraud in an academic setting and the various means by which perpetrators commit fraud. The Ethics section is designed to discuss ethical issues in the accounting profession and academic financial administration. Participants will be asked to read and discuss relevant ethical dilemmas to develop objective approaches to independence, evaluation, conflicts of interest, and appropriate courses of action in decision-making. Participants will leave the course with an awareness of how decisions and actions can promote positive ethical outcomes.

### 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 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.

## **HED 2294 — Board of Trustees Communication**

It does not matter how detailed and comprehensive your work is. If you do not communicate your results in a way that the Board or senior leadership understand, and if you don't do so in a compelling and confident manner, your work and your credibility will suffer.

Conversely, if you do great work AND your written and verbal communication are informative, engaging, understandable, and actionable, you and your work will likely be more impactful.

Learning how to enhance your written and verbal communication skills is, arguably, one of the most important leadership skills – and one that is, unfortunately, often missing. In this session, you will learn practical tools and strategies you can use to gain confidence in your communication skills to the Board, senior leadership, and your team.

### Learning Objectives:

- Be able to understand the essential elements of communicating with the Board
- Be able to develop strategies for putting together impactful communications to the Board
- Be able to focus on the most critical verbal presentation skills that are necessary to effectively communicate with the Board

## **HED 2295 — Current/Upcoming Issues in Higher Education: The Intercollegiate Athletics Eco-System**

This session will provide participants with a global view and insight on trends and current issues impacting the business of intercollegiate athletics on all levels.

Participants will learn how to develop ideas that will help support and enhance their current campus by understanding the ROI of a well-functioning athletic department that is supported by all campus units.

### Learning Objectives:

- Understand different models of funding and how athletic department budgets are built on campuses
- Understand the complexity of collegiate athletic operations in a larger university context (central offices, procurement, human resources)
- Case Study exploring the impact of NIL on departments and innovative ways to build new revenue streams
- Legal Environment of College Athletics within the Higher Education landscape (NIL contracts, coaches' contracts, student-athlete employment and utilization efforts, etc.)

## **HED 2296 — How do Universities/Colleges Work**

This special topics seminar provides a window into how universities operate, how decisions are made, and how policies are formed and implemented. Administration, management, strategic planning, governance, and budget of universities will be explored.

### Learning Objectives:

- Critically analyze universities and how they operate within various contexts and structures
- Understand how universities are funded
- Determine how funding flows throughout the institutions
- Explain how the different administrative units intersect to serve the faculty and students
- Understand the role administration plays in conjunction with faculty towards achieving institutional aims and mission
- Explain how decisions are made and how policies are formed and implemented
- Discuss how institutional priorities are determined and are met or unmet at various levels of the institution
- Become conversant of higher education literature and the study of higher education.

## **HED 2297 — Innovation and Design Thinking: Transforming Challenges into Opportunities**

This interactive 2-hour session introduces participants to the principles of design thinking and their relevance in higher education. Participants will explore the design thinking process, identify shared institutional challenges, and apply brainstorming techniques to develop creative solutions. Through collaborative activities, attendees will model innovative strategies that address real-world challenges faced by their institutions.

### Learning Objectives:

- Discuss the steps of the design thinking process and its relevance to higher education.
- Identify shared institutional challenges to uncover opportunities for creative solutions.
- Model innovative strategies using brainstorming techniques to address challenges.

## **HED 2298 — Strategic Planning and Goal Setting: Crafting a Roadmap for Institutional Success**

This streamlined 1-hour session equips college and university administrators with essential strategic planning skills to align on institutional goals and develop actionable steps. Participants will identify key planning components, collaborate to prioritize institutional objectives, and practice using goal-setting frameworks to create short-term action plans with clear implementation steps. This session emphasizes alignment, focus, and accountability for impactful outcomes.

### Learning Objectives:

- Identify the key components of effective strategic planning and their role in achieving institutional success.
- Align on institutional goals to focus on high-impact areas.
- Practice utilizing goal-setting frameworks to develop actionable short-term objectives and outline initial implementation steps.

## 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.

### Learning Objectives:

- 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.

### Learning Objectives:

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

## **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.

## **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.
- 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.

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.

## **PER 2298 — Developing Leadership Effectiveness through Collaboration and Negotiation**

Whether managing team dynamics, collaborating within or across departments, working with a challenging boss or direct report, or making the case for funding or new projects, leaders must be negotiators. You can achieve the results you want, but you must have the right negotiation mindset. This session will cover the basics of developing an effective, practical, and efficient approach to negotiating. It will provide hands-on practice in negotiating common, everyday work situations to build confidence in negotiating with others to overcome resistance, foster cooperation, and achieve mutually beneficial outcomes.

### Learning Objectives:

- Examine interest-based negotiation and why it is superior to traditional, generally ineffective adversarial negotiation processes for achieving collaborative outcomes.
- Explore common barriers to negotiation, such as impasse, hard bargainers, and “dirty tricks,” and how to overcome them.
- Consider how engaging in and modeling interest-based negotiation leads to improved working relationships, team dynamics, and collaboration to achieve organizational goals.
- Receive hands-on application and practice through simulations and reflective exercises to build confidence in negotiation and collaborating with others.

## **PER 2299 — From Inspiration to Chaos: The Impacts of Leadership**

This session explores the profound impact leadership has on teams, organizations, and outcomes. Attendees will gain insight into how good and bad leadership behaviors ripple through an organization, influencing morale, productivity, and long-term success. Real-life examples, actionable strategies, and interactive discussions will provide a clear roadmap for identifying and embodying effective leadership practices.

### Learning Objectives:

- Understand the traits and behaviors that differentiate effective leaders from ineffective ones.
- Analyze the short-term and long-term impacts of leadership on team dynamics and organizational culture.
- Learn practical strategies to cultivate strong leadership qualities and mitigate harmful tendencies.

## **PER 2300 — How to Lower Stress When You are Overwhelmed at Work**

As college administrators, it is easy to feel overwhelmed when we find ourselves pulled in many directions at once with too much to do. This interactive session, created especially for those new to higher education management, will share techniques and systems from Getting Things Done, a productivity system developed by consultant and author David Allen. This system for clearing your mind can transform the way you approach your day with lower stress, allowing you to do your best work.

### Learning Objectives:

- Learn how to apply the "do it, delegate it, defer it, drop it" rule to empty your in-box
- Acquire tools to reassess goals and stay focused in changing situations
- Get help defining next actions to get projects unstuck
- Overcome feelings of confusion, anxiety, and being overwhelmed

## **PER 2301 — Lead at Work, Thrive at Home: Managing Decision Fatigue**

Lead at Work, Thrive at Home: Managing Decision Fatigue for Professionals is a transformative session that equips participants with energy management techniques and decision-making strategies to lead with intention and vitality. Through interactive exercises and real-time feedback, participants will explore the root causes of decision fatigue, discover actionable solutions to reduce daily overwhelm, and align their choices with core values for a sustainable work-life rhythm.

### Learning Objectives:

- Understand the Causes and Impact of Decision Fatigue: Identify the root causes of decision fatigue and its effects on productivity, emotional well-being, and relationships in both professional and personal settings.
- Develop Strategies to Minimize Decision Fatigue: Explore practical tools and techniques, such as decision prioritization, automation, and boundary-setting, to reduce daily decision-making and conserve mental energy.
- Apply Energy Management Principles to Decision-Making: Leverage Core Energy Coaching concepts—like recognizing energy-draining patterns and aligning choices with core values—to make more intentional, empowered decisions at work and home.

## **PER 2302 — Leading from Within: The Power of Self-Reflection**

This transformative session empowers leaders to harness the power of introspection for greater effectiveness. In today's fast-paced workplace, successful leadership requires more than managing tasks, it demands self-awareness, emotional intelligence, and authenticity. Participants will explore how self-reflection enhances

clarity, empathy, and purpose, gaining tools to identify values, strengths, and growth opportunities. Through interactive exercises and actionable strategies, attendees will learn to integrate self-reflection into their daily routines to boost decision-making and leadership impact. Whether you're an experienced leader or just starting out, this session equips you with the insights and strategies needed to inspire others, build trust, and navigate challenges with confidence. Unlock your leadership potential by starting from within.

Learning Objectives:

- Recognize how introspection enhances leadership effectiveness, emotional intelligence, and authenticity.
- Gain clarity on core values, strengths, and growth areas to align leadership with purpose.
- Learn practical tools and exercises to incorporate self-reflection into daily leadership routines.
- Use self-awareness to improve decision-making, build trust, and strengthen leadership presence.
- Develop strategies to lead with clarity, empathy, and resilience in dynamic workplace environments.

### **PER 2303 — Quiet Leadership**

No title is required to be a leader. True leadership is about intentionality, influence, and integrity. Quiet leadership involves inspiring and motivating others to follow your vision rather than relying on authority or power to get things done. Through reflection and conversation, we'll uncover what it means to lead thoughtfully, ethically, and effectively in today's world. This session will provide participants the opportunity to establish core values, explore ways to enhance collaboration, and tools to expand influence.

Learning Objectives:

- Define quiet leadership and identify its key characteristics
- Articulate their personal core values and how these values inform their leadership style
- Explore strategies to foster collaboration within teams

### **PER 2304 — The Leadership Mindset: Strengthening Focus, Clarity, and Purpose**

This session dives deep into the core pillars of effective leadership: focus, clarity, and purpose. Participants will learn strategies to sharpen their focus amidst competing priorities, gain clarity in decision-making, and align their actions with their personal and organizational goals. Through guided reflection, interactive exercises, and practical role-playing scenarios, attendees will discover how to harness their inner abilities to lead with confidence and authenticity.

Learning Objectives:

- Learn actionable strategies to prioritize tasks, manage distractions, and maintain a laser-sharp focus on goals, enabling you to lead with efficiency and precision.
- Discover tools to analyze complex situations, gain clarity in uncertain moments, and make confident decisions that align with your vision and values.
- Create a personalized leadership plan that integrates your core values and organizational objectives, ensuring your actions consistently reflect purpose-driven leadership.

### **PER 2305 — The TikTok Generation: Understanding & Engaging Gen Z in the Workplace**

Today's workplace is more intergenerational than ever—and ready or not, Gen Z has entered the chat. This interactive, no-fluff training is designed to help teams bridge generational gaps, adapt leadership styles, and build environments where Gen Z can thrive without losing what makes them... them.

Learning Objectives:

- Describe key characteristics and expectations of Gen Z in the workplace and how they differ from other generations.
- Assess their team or department's readiness to engage, support, and retain Gen Z talent using a custom readiness tool.

- Apply practical strategies to strengthen communication, connection, and team culture across generations.

## 2025 Refresher Only Courses

### **REF 3003 — Hiring Smarter: Strategies for Higher Education Recruitment (Refresher Only Roundtable Discussion)**

Recruiting the best talent for higher education institutions is both an art and a science. With increasing competition for top-tier candidates, extended hiring timelines, and the demand for high-quality hires, institutions must navigate complex challenges to meet their recruitment goals. This interactive roundtable discussion will bring together higher education leaders to share insights, strategies, and best practices for optimizing hiring processes. Participants will explore topics such as reducing turnaround times, enhancing the quality of hires, recruiting niche talent, and leveraging innovative approaches to attract the best candidates. Through collaborative dialogue, attendees will leave with actionable takeaways and fresh perspectives to elevate their institution's recruitment efforts.

Learning Objectives:

The primary aim of this roundtable is to foster a dynamic exchange of ideas and practical solutions that address the unique challenges of hiring in higher education. By the end of this session, participants will be able to:

- Identify effective strategies to streamline hiring processes and reduce turnaround times.
- Evaluate and implement practices that enhance the overall quality of hires.
- Explore innovative approaches to recruiting and retaining top talent within academic institutions.

### **REF 3004 — Political Trends in Higher Education (Refresher Only Roundtable Discussion)**

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.

### **REF 3005 — Strategic Partnerships (Refresher Only Roundtable Discussion)**

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.