



72nd Annual

College Business Management Institute

July 27th - August 1, 2025



A Message From the CBMI Team

As we close another incredible year at CBMI, we're reminded that what makes this program special isn't just the classes or the campus, it's the people. Each conversation, collaboration, and shared laugh helps strengthen the community that's been growing here for 72 years.

Thank you for bringing your energy and ideas to CBMI 2025. We hope this yearbook captures the spirit of your time here and the connections that make it unforgettable.



About CBMI

Founded in 1953, CBMI continues to provide participants with an overview of current issues and procedures applicable to institutions of higher education large and small, public and private.



Objectives

Participants can expect to gain a broader perspective of higher education business administration, discuss the latest issues and topics in higher education, and develop professional relationships with colleagues at other institutions all over the country.



How it Started...



The College Business Management Institute (CBMI) began as a collaborative effort to provide higher education business professionals with practical, hands-on training. From the beginning, the mission was simple: to help business officers at colleges and universities expand their knowledge, build community, and bring new ideas back to their campuses.

How it's Going!



Seventy-two years later, CBMI continues to bring together hundreds of professionals from across the country each summer at the University of Kentucky. The program has evolved with the times, offering diverse classes, dynamic faculty, and countless networking opportunities that reflect the ever-changing landscape of higher education.

Let's Take a Closer Look

CBMI Over The Years

1953



The very first CBMI was held in 1953 at the University of Kentucky, where just over 50 attendees came together to begin what would become a long-standing tradition of learning, connection, and professional growth.

1963



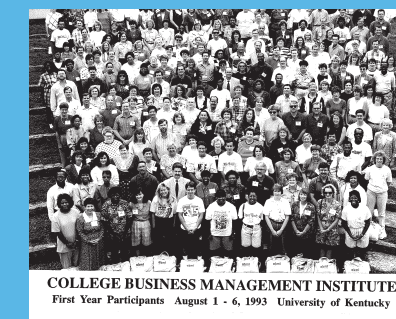
1975



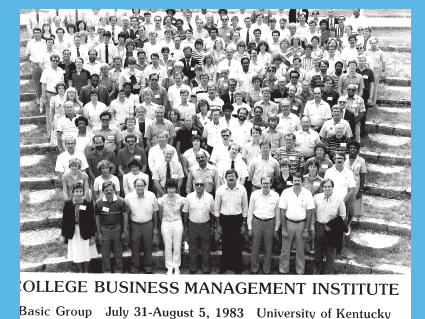
2003



1993



1983



2024



2023



2025



Seventy-two years after the first CBMI, we celebrated our highest attendance yet: just over 850 participants. What began as a small gathering of professionals has grown more than elevenfold, evolving into a cherished annual tradition.

Let's Talk About CBMI 2025

The 2025 College Business Management Institute was a tremendous success, bringing together professionals from **27** states for a week of learning and connection in Lexington. With **78** classes led by **64** distinguished faculty members, participants gained valuable insights across every area of higher education business management. In total, more than **850** attendees joined us this year, making CBMI 2025 our largest and most successful program yet!

Yes, over 850 attendees
here are just a few of them...



Where It All Comes to Life

The places CBMI attendees spent most of their time at during conference week



Gatton Student Center

The Gatton Student Center served as classroom space and meal time space for CBMI attendees. While we had fewer classes happening here this year, lunches and breakfasts were held in this larger space so that first year and returning attendees could network.

Gatton College of Business and Economics

The Gatton College of Business and Economics building hosted the majority of the classes at CBMI this year.



Central Bank Center

The Opening and Graduation Ceremonies were hosted in downtown Lexington at the Central Bank Center once again this year. Along with other networking events such as the First Year Orientation, The Social Experience with Rikketta Franklin, and the Monday Night CBMI Clue and Cocktails.

Downtown Hotels

CBMI has partnership with some of Lexington's Downtown hotels, such as the Hilton Lexington Downtown, Hyatt Regency, Lexington Marriott City Center and Residence Inn and 21c Museum Hotel.



Networking Events

Let's take a look back at this year's networking events. From smaller intimate events to large gatherings, these events brought together professionals who share a passion for learning, leadership, and community.

First-Year Orientation



First-Year Soirée



The Social Experience with Rikkettaw Franklin



Late Night Networking Happy Hour





Graduation Ceremony



As we flip through these snapshots of connections being made, it's clear that networking is at the heart of CBMI. But behind every successful event, session, and interaction is a *dedicated team* making sure everything runs smoothly and continues to grow.

Each year, we strive to make our classes, faculty, schedules, and activities even better, evolving based on the feedback we receive from our attendees. None of this would be possible without the support of our Advisory Committee. Their dedication and insight help us plan, prepare, and adapt year after year to deliver an exceptional CBMI experience.

Let's dive into what each committee does!



Communications & Marketing Committee



The Communications & Marketing Committee plays a key role in keeping the CBMI community informed, connected, and engaged year-round. From running email and social media campaigns to coordinating with production teams to plan interviews and identify footage needed for each project, the committee ensures every message reflects CBMI's mission.

Attendee Experience Committee



The Attendee Experience Committee creates meaningful moments that help every attendee feel connected, supported, and inspired throughout the week. From the keynote to special events for first-year participants, this team ensures everyone has opportunities to network and make the most of their CBMI journey. Every detail is designed to make the CBMI experience unforgettable.

Events & Hospitality Committee



The Events & Hospitality Committee is the team behind the experiences that make CBMI unforgettable. They plan all the events, from the theme for game night to graduation festivities, and manage the special touches that make attendees feel welcome. They also coordinate tours and highlight local attractions for attendees to explore throughout the week.

Curriculum Planning Committee



The Curriculum Planning Committee works with faculty to design and refine the course lineup each year, ensuring sessions meet the evolving needs of higher education professionals. From selecting instructors to coordinating schedules and content, the committee helps CBMI deliver high-quality, practical education for every attendee.

External Review Committee



The External Advisory Committee is made up of CBMI graduates and higher education professionals from institutions across the country who help shape the future of the program. This group provides valuable feedback on curriculum, programming, and the overall attendee experience to ensure CBMI continues to grow and stay relevant. For those who want to stay involved after graduating, joining the External Advisory Committee is a great way to give back and make a lasting impact.

Faculty

CBMI faculty play a vital role in making the program a success. They include university leaders, business professionals and industry experts from organizations, colleges and universities across the nation.



Roy Anasagasti
AVP & Chief Procurement Officer



Stephen Burr
Chief Information Security Officer



Mark Anderson
Executive Director Enterprise Risk Management



Eileen Byrne
Senior Consultant



Martin Anibaba
Deputy Accountability Officer and Audit Executive



Monique Carroll
Vice President and Director of Athletics



Jimmy Barnes
Senior Lecturer



Frank Cella
Managing Director, Education Practice Leader



Lynda Batiste
Executive Director of Finance, Budget and Compliance



Sean Childers
Associate Vice President for Operations



Sarah Bowes
Employment Director



Rob Clark
Chief Audit and Compliance Officer



Angie Brown
Director of Communications and Worklife



Mark Coldren
Leadership & Engagement Specialist



Lisa Deal
Retired CPO



Robert Dixon
Director Grants and Contracts, Financial Admin



Lori Eckdahl
Executive Director, Advancement Services



Kelsey Finn
VP for Strategic Initiatives



Gretchen Fitzgerald
Director of Enterprise Risk Management



Rikketta Franklin
Founder + CEO



Joni Freeman
Global Head of Payments Learning



David Gleason
Organization Development Consultant



Larry Goldstein
President



Daniel Griffith
Instructor



Casey Grimes
Integrated Success Coach



Russ Hannah
Vice Chancellor for Finance and Administration & CFO



Anita Ingram
Assistant Professor, Educator - Management



Wendy Johnson
Principle/CEO



Anna Kourouniotis
Database Analyst II



Susan Krauss
Managing Director



James Lock
Managing Director



Jeff Marsee
Consultant/Presenter



Angie Martin
VP for Financial Planning
and Chief Budget Officer



Lisa McCauley
Professor



Sandy Mitchell
Director, Office of Insurance



Eric Monday
Executive Vice President for Finance
and Administration (EVPFA)



Emily Moran
Director, Finance Strategy
& Analytics



Brittany Morgan
Director of Finance and
Administration



Mario Morris
Senior Vice President of Administration
and Chief Financial Office



Michael Noth
Assistant Dean for Finance
and Administration



Robin Oldfield
Vice President of Safety, Audit,
Risk and Compliance



Tiffany Osborne
Director, National & Strategic
Initiatives | Author



David Parker
Executive Director, Enterprise Risk
Management, Ethics & Compliance



Mary Peloquin-Dodd
Director



Rachel Pluviose
Senior Director, Risk Management
& Insurance



Heath Price
Associate Vice President
for Partnerships



Jasmine Prince
Associate Director of the Martin
Luther King Center



Jeff Rayis
CFO



Colorado Robertson
Director of Risk Management



Alvin Rodack
Associate Director



Nancy Rohde
Investment Director



Kevin Sisler
Director of Treasury Services



Jon Speare
Executive Director



Kristen Sutherland
Project Manager



Tristan Tafolla
Senior Director, Finance Operations
and Strategic Risk Management



Cory Thalheimer
Acting Co-Executive Director
of Auxiliary Services



Kirsten Turner
Vice President for Student Success



Rikki Turner
Motivational Speaker



Esmeralda Valdez
Executive Director of University
Services



Shannon Walker
Strategic Planning Consultant



Kalynn Walls
Attorney



Elliot Young
AVP University Risk
& Compliance Officer



Marianne Young
Assistant Vice President
for Financial Wellness

Course Curriculum

1st Year Attendees

Curriculum Overview:

Individuals that participated for the first time attend 8 classes (26 hours of instruction) which were designed to provide participants with an overview of higher education. First-year participants had multiple options to choose from for their accounting course, management course, and specialized knowledge courses. We also offered five facilities tour options to choose from.

Course Listing:

1120	The Business of Higher Education	4 hours
1130	Fundamentals in Accounting	4 hours
1135	Principles of Accounting and Financial Reporting	4 hours
1140	Introduction to Purchasing - Policies and More	4 hours
1145	The Beginners Guide to Insurance and Risk in Higher Education	2 hours
1146	Putting the “Super” in Supervision	2 hours
1147	Why I Like You, Why I Don’t	2 hours
1150	Human Resources	6 hours
1155	Compliance 101	2 hours
1156	Partnering for Student Success	2 hours
1158	Presence & Power: Leading with Impact and Confidence	2 hours
1170	Facilities Management	4 hours
1172	Facilities Tour - James B. Beam Institute	2 hours
1173	Facilities Tour - Gatton Student Center & The Cornerstone	2 hours
1176	Facilities Tour - Gray Design Building	2 hours
1177	Facilities Tour - Historic Memorial Coliseum	2 hours
1178	Facilities Tour - The Studio (Learning/Research Lab)	2 hours



Returning Attendees

Curriculum Overview:

Individuals that participated for the second year, third year, or that elected to take refresher courses could select their program of study from the following classes.



Course Listing:

Budget and Planning

BUD 2241	Budgeting: Large Schools	4 hours
BUD 2242	Budgeting: Small Schools	4 hours
BUD 2243	Budget Process and the Business Officer	4 hours
BUD 2246	Strategic Budgeting: Using Analytics to Efficiently Allocate Instructional Resources	2 hours
BUD 2247	Higher Education Analytics	2 hours
BUD 2248	Understanding the Budget Process in Higher Education	1 hour
BUD 2249	Developing a Workforce for the Future Through the Budget Process	2 hours
BUD 2250	Grants: There is NO Way Around Them -- So Embrace Them	2 hours

Business

BUS 2211	Advanced Auxiliary Services	2 hours
BUS 2213	Audits	4 hours
BUS 2216	Third Party Risk Management (Treasury Track)	2 hours
BUS 2218	Enterprise Risk Management (ERM) Bootcamp	4 hours
BUS 2251	Disaster Recovery & Resilience in Higher Education	2 hours
BUS 2252	Hot Topics & Trends in NCAA Compliance	2 hours
BUS 2253	Current Hot Topics in Risk Management (Treasury Track)	2 hours
BUS 2254	Don't Pay Twice! Indemnification, Contractual Liability, and Additional Insured	2 hours
BUS 2255	Addressing Employee Needs in Higher Education: A Data-Based Future Focused Leadership Session	2 hours
BUS 2256	Strengthening Business Operations Through an Innovative Mandatory Training Program	2 hours
BUS 2257	Advanced Knowledge of Facilities Management	2 hours
BUS 2258	Data-Driven Storytelling: Creating Engaging and Informative Presentations	2 hours
BUS 2259	Payment Systems Today and in the Future	4 hours

Computer Information Sciences

CIS 2266	Cybersecurity in Higher Education	2 hours
CIS 2268	Navigating Global Frontiers: A Primer on International Risk Management for Business Officers	2 hours
CIS 2269	Managing AI Risk in Higher Education Environments: A Comprehensive Approach	2 hours

Finance

FIN 2231	Stewardship of Gift Funds	2 hours
FIN 2232	Introduction to Capital Finance (Treasury Track)	2 hours
FIN 2235	Fundamentals of Higher Education Investments (Treasury Track)	2 hours
FIN 2237	Treasury Management (Treasury Track)	4 hours
FIN 2240	Advanced Capital Financing (Treasury Track)	4 hours
FIN 2242	PCI Compliance and Trends in Higher Education Payments (Treasury Track)	4 hours
FIN 2243	Using Financial Ratios to Assess Institutional Financial Health	4 hours
FIN 2248	Current Issues & Trends in Strategic Treasury Management (Treasury Track)	2 hours
FIN 2249	Procurement - Driving Organizational Value	2 hours
FIN 2250	Asset/Liability Management and Long-Term Planning (Treasury Track)	2 hours

Higher Education Administration

HED 2224	Cross-Cultural Leadership: Navigating Generational Dynamics in the Modern Workplace	4 hours
HED 2225	Current Legal Issues in Higher Education	2 hours
HED 2288	Fraud/Ethics	2 hours
HED 2293	Change Management	2 hours
HED 2294	Board of Trustees Communication	1 hour
HED 2295	Current/Upcoming Issues in Higher Education: The Intercollegiate Athletics Eco-System	2 hours
HED 2296	How Universities/Colleges Work	2 hours
HED 2297	Innovation and Design Thinking: Transforming Challenges into Opportunities	2 hours
HED 2298	Strategic Planning and Goal Setting: Crafting a Roadmap for Institutional Success	1 hour

Personnel, Benefits, and Staff Relations

PER 2252	Contemporary Human Resources Practices	4 hours
PER 2258	Learning to Think with More than One Hat	2 hours
PER 2286	Understanding Communication Styles	2 hours
PER 2290	Supervising with a Mental Health Mindset	2 hours
PER 2291	Building Your Team Through Emotional Intelligence	2 hours
PER 2292	Rethinking Workplace Conflicts and How to Respond to Them	4 hours
PER 2293	How to Say No	2 hours
PER 2294	Build a Process to Successfully Recruit Talent to Your Institution	2 hours

Course Listing Continued:

PER 2295	Building Institutional Resilience: The Crucial Role of Business Officers in Higher Education	2 hours
PER 2296	I am Unstoppable Because	2 hours
PER 2297	Strategies for Creating, Developing and Leading Productive Remote Teams	4 hours
PER 2298	Developing Leadership Effectiveness through Collaboration and Negotiation	4 hours
PER 2299	From Inspiration to Chaos: The Impacts of Leadership	1 hour
PER 2300	How to Lower Stress When You are Overwhelmed at Work	1 hour
PER 2301	Lead at Work, Thrive at Home: Managing Decision Fatigue	2 hours
PER 2302	Leading from Within: The Power of Self-Reflection	1 hour
PER 2303	Quiet Leadership	2 hours
PER 2304	The Leadership Mindset: Strengthening Focus, Clarity, and Purpose	1 hour
PER 2305	The TikTok Generation: Understanding & Engaging Gen Z in	

Refresher Attendees

Curriculum Overview:

Individuals returning to CBMI after graduating from the program have access to a few Refresher Only courses.

REF 3003	Refresher Only Roundtable Discussion: Hiring Smarter - Strategies for Higher Education Recruitment	2 hours
REF 3004	Refresher Only Roundtable Discussion: Political Trends in Higher Education	2 hours
REF 3005	Refresher Only Roundtable Discussion: Strategic Partnerships	2 hours



Treasury Track Attendees

Curriculum Overview:

For higher education treasury managers and staff members interested in treasury concepts, the Treasury Institute of Higher Education (TIHE) has partnered with CBMI to provide a Treasury Management track within CBMI. In 2025, the Treasury Track included the following courses:

TRS 2232	Introduction to Capital Finance	2 hours
TRS 2235	Fundamentals of Higher Education Investments	2 hours
TRS 2237	Treasury Management	4 hours
TRS 2240	Advanced Capital Financing	4 hours
TRS 2242	PCI Compliance and Trends in Higher Education Payments	4 hours
TRS 2251	Current Issues & Trends in Strategic Treasury Management	2 hours
TRS 2250	Asset/Liability Management and Long-Term Planning	2 hours
TRS 2252	Current Hot Topics in Risk Management	2 hours
TRS 2252	Third Party Risk Management	2 hours



Important Information

Scholarships

CBMI is committed to supporting participants through several scholarship opportunities, including a dedicated scholarship for first-year attendees working in procurement (sponsored by National Association of State Procurement Officials (NASPO) and Procurement Professionals Alliance (PPA)). Additional scholarships are offered through the Southern Association of College and University Business Officers (SACUBO) and the Treasury Institute for Higher Education (TIHE), helping more professionals attend this signature business-management program.

Sponsors/Partners

CBMI thrives thanks to a broad community of sponsors and partners. Our Premier partner is the Southern Association of College and University Business Officers (SACUBO), and Elite and Select partners include organizations such as the Treasury Institute for Higher Education (TIHE), National Association of State Procurement Officials (NASPO), Procurement Professionals Alliance (PPA), University Risk Management & Insurance Association (URMIA), Barnes & Noble, Aramark/UK Dining, and Ricoh.

This network of industry and higher-ed leaders helps ensure a cutting-

Certificates and CPEs

Attendees at CBMI can earn an official Certificate of Completion after attending the conference each summer for three years. Additionally, the conference is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education (CPE), enabling participants to earn up to 26 hours of CPE credits this year.

CBMI 2026

Mark your calendar: CBMI returns to the University of Kentucky campus in Lexington from July 26–31, 2026. Registration opens in April 2026, and this upcoming 73rd-year conference promises another engaging week of courses, connections, and growth tailored for higher education business professionals. For more updates, be sure to visit our website.

Thank you for attending CBMI 2025!

Your participation is what made it another
incredible year of learning and growth.

Connect with us!

