2026 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 South Carolina and University of Kentucky as examples. Topics to be covered include the basic components of operating and capital budgets, and operating budget models, development processes and lifecycle. Examples of RCM, performance funding, tuition revenue forecasting, and various allocation models 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.

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 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 play a critical role in supporting an institution's educational mission while shaping the day-to-day campus experience. This advanced session will examine three core auxiliary operations common across higher education—housing, dining, and campus retail—through direct engagement with industry partners.

Featuring leaders from Greystar (Housing), Aramark (Dining), and Barnes & Noble (Bookstore), the course will explore how these auxiliary services operate within a university environment, the evolving challenges they face, and the strategies used to balance operational efficiency, student satisfaction, and institutional priorities. Participants will gain insight into partnership models, service delivery, and effective communication strategies that demonstrate the value of auxiliary services within higher education.

Learning Objectives:

- Articulate the strategic value of third-party dining partners, including how these partnerships can enhance operational expertise, financial sustainability, innovation, and student experience while allowing the institution to focus on its core educational mission.
- Explain the operational value of engaging a third-party dining partner, including how these partners improve efficiency, staffing and labor management, food safety and compliance, supply chain resilience, and day-to-day service consistency across campus dining operations.
- Connect day-to-day housing operations with student success and retention outcomes, including how staffing models, maintenance performance, and operational decision-making directly impact the resident experience.
- Understand how public-private partnerships in campus housing are structured to align institutional priorities with operational execution, and how strong alignment drives both student satisfaction and financial performance.
- Assess the impact of First Day Access programs on student readiness and outcomes, including how access to required course materials on or before the first day of class supports academic confidence, engagement, and student outcomes.
- Analyze the value of First Day programs in advancing affordability, equity, and convenience, including reduced cost of materials, greater price transparency, and the removal of access barriers for all students, especially for those most at risk of delayed or incomplete access.
- Evaluate First Day programs as an elevated campus service and operational strategy, highlighting how seamless delivery, faculty alignment, and integrated bookstore partnerships transform course materials from a transactional purchase into a student-centered academic experience that supports institutional priorities.
- Examine national case studies representing a broad range of institutions offering First Day programs.

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

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 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.

<u>Learning Objectives:</u>

- 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!

<u>Learning Objectives:</u>

- 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 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. 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 incorporate techniques that engage your audience, integrate data stories, and be able to 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.

Prerequisite:

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).

No Prior Knowledge Required:

1. Advanced Data Analysis Techniques: Participants do not need to have advanced data analysis skills or experience with complex statistical methods.
2. 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:

- Review and select techniques to declutter visuals, focus on the impact, and clarify the message.
- Identify your audience and engage them through compelling numbers and narratives.
- Review and execute an approach to visualize, tailor, and align visuals to the audience.

BUS 2260 — Advanced Insurance and Risk Management *(Treasury Track)*

Insurance is often viewed as a necessary operational expense, yet the decisions surrounding risk financing, coverage structure, and retention levels have profound implications for institutional resilience and financial stability. This advanced course moves beyond insurance basics (although we'll do a brief review of the basics) to explore how higher education leaders strategically evaluate risk, structure insurance programs, and align risk management with institutional priorities.

Participants will examine real-world case studies involving major campus incidents, emerging risks, and complex insurance negotiations. Through facilitated discussion and scenario analysis, attendees will explore how insurance data, loss trends, and risk tolerance influence capital planning, crisis response, and long-term institutional strategy. The course is designed for professionals who already understand insurance fundamentals and want to deepen their ability to use risk management and insurance as strategic tools for institutional decision-making.

Learning Objectives:

- Analyze complex risk exposures and emerging risks facing higher education institutions. (heat map or risk matrix?)
- Evaluate strategic insurance decisions including retention levels, program structure, and alternative risk financing options.
- Interpret insurance market trends to inform institutional decision-making.
- Apply risk management principles to real-world campus scenarios including major incidents and crisis events.
- Integrate risk management insights into broader institutional strategy

Computer Information:

CIS 2266 — Cybersecurity in Higher Education

This course explores the evolving cybersecurity landscape in higher education, focusing on the unique challenges colleges and universities face in protecting their digital environments. We will examine key security issues affecting academic institutions, including threats to research data, student information, and distributed campus networks. The course also introduces essential security controls and best practices used to mitigate risk, strengthen institutional resilience, and support compliance with security frameworks. In addition, the course highlights the role of strategic partnerships with technology providers, security teams, and institutional leadership in building effective and collaborative cybersecurity programs within higher education environments.

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

CIS 2270 — A Framework for Humanizing Data Analysis

The session focuses on humanizing data analysis for higher education business and data analysts by shifting from technical perfection to impactful conversations with stakeholders. It guides participants through common traps analysts face—such as prioritizing tools over real problems, failing to tailor information for different audiences, and working in isolation—and replaces these with collaborative, audience-centered approaches.

- The session opens by questioning why perfect data work sometimes fails to influence decisions and introduces the theme that conversations, not just better tools, are the key to impact.
- The session organizes its content around five "traps," including starting with the tool instead of the problem, using one-size-fits-all explanations, focusing too much on technical details, neglecting to define the root issue, and working alone.
- Engagement elements like polls, breakout activities, real scenarios, and live Q&A drive home the importance of audience understanding, collaborative problem-solving, and making data analysis a human-centered discipline.

Note: this focus of this course on mindset rather than technical expertise. The intended audience are professionals (from early to mid-career) who are involved in some form of business or data analysis and are seeking ways to rethink their data challenges using a human-first approach.

Learning Objectives:

- Understand how to shift from a tool-centered to a problem-centered mindset, ensuring data work aligns with actual decision-making needs.
- Learn strategies to tailor data insights and explanations to different audiences, improving stakeholder understanding and engagement.
- Develop collaborative habits, such as gathering early feedback and defining problems through dialogue, to enhance solution relevance and adoption.

CIS 2271 — AI Techniques for Business Analysts

This introductory session explores how AI is transforming the way we work. Designed for beginners—those who have not yet adopted AI or are just starting to explore it—the course focuses on building essential skills for leveraging Generative AI (GAI) effectively. By the end of the session, participants will have a solid foundation in GAI principles and practical strategies to integrate these technologies into their workflows.

Learning Objectives:

- Core Concepts: An introduction to Generative Pre-trained Transformers (GPTs), including their strengths and limitations.
- Prompt Engineering Fundamentals: How to write effective prompts and refine outputs through iterative improvement.
- Practical Applications: Ways professionals can apply GAI tools and techniques to data-centric tasks.
- Tool Familiarity: Exploration of common GAI models and tools for text, code, image generation, and data augmentation.

CIS 2272 — AI-Supported Model for Student Workforce Development

This course explores how higher education institutions can design and scale student workforce development programs using artificial intelligence as a structured support system for learning, mentorship, and operational contribution while also supporting the day-to-day needs of operational staff. The presentation demonstrates how students can be integrated into live University operations while developing workforce ready technical and professional skills.

Participants will learn how students support real institutional work through operational tasks, structured workflows, documentation, and program support within clearly defined roles and guardrails. The session highlights how AI can be used to scaffold learning, standardize workflows, support reflection, and scale coaching without replacing human judgment or increasing institutional risk. While focused on cybersecurity, the model is positioned as transferable across student workforce programs.

Learning Objectives:

- Understand how to design an AI supported student workforce development model that integrates students into live operational environments while maintaining institutional trust and oversight.
- Identify how artificial intelligence can be applied to scale coaching, documentation, and skill development within student programs without replacing human mentorship.
- Examine key structures, roles, and guardrails required to manage risk and ensure quality in AI supported student led operations.
- Apply a transferable framework for positioning student workforce programs as strategic assets that support career readiness and institutional outcomes.

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 borrowing for operations, buildings, renovations and other capital assets? Not really sure how to define just what a bond is, or what possibilities exist if you need to borrow for your institutional needs? This course will introduce participants to the basics of external borrowing, introducing you to the major players in the process and the language they speak. Explore the history of bond financing in higher education and the municipal market—the most common source of long-term financing. Leave with a basic understanding of different types of debt instruments (long-term bonds and short-term) capital budgeting, the rationale for issuing debt or borrowing for operations, and sources of capital for colleges and universities. Learn about the different types of documents that are associated with external borrowing and see some examples of past bond projects.

Learning Objectives:

- Obtain a working knowledge of the capital budgeting process
- Understand the different types of debt (long term and short term) and the difference between new money and refinancing
- Understand the concept of bond security and the difference between a general obligation pledge and a revenue pledge to bond holders
- Learn about sources of capital and the different segments of the municipal bond market
- Acquire a broad knowledge of the workings of the US municipal bond market and the relationship of municipal bonds to interest rates
- Gain insight into the rationale for borrowing
- Be able to identify the major players in a bond transaction and the roles they play
- Build a basic vocabulary of debt and bond financing terminology
- Understand the concepts of debt service coverage from revenues and managing to bond covenants
- 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 managed debt program is an essential part of effective colleges and university financial management. Issuance and effective management of debt require a significant work commitment by the institution's administrative staff. This course will delve into many of the complex issues that financial and business managers in higher education should understand about debt, including long versus short term debt, general obligation versus revenue debt, variable vs. fixed rate debt, credit enhancement, taxable vs. tax-exempt financing options, ongoing compliance for debt outstanding, and IRS arbitrage regulations. You will gain an understanding of bond covenants and their potential effect on your operating flexibility as you work through an analysis of the various types of bond issues, including off balance sheet transactions. You will gain an understanding of the economic decisions surrounding when to issue debt and when to refinance, and decisions about derivatives such as interest rate swaps. 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 and the relationship between US treasuries and the municipal bond market
- 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
- Learn about the economic decisions involved with refinancing debt and the use of derivatives
- 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

FIN 2251 — Advanced Endowment Management *(Treasury Track)*

This course will deepen participants' understanding of the endowment model and concept of intergenerational equity stewardship; providing an overview of legal requirements and how higher education entities develop endowment investment and spending policies to achieve intergenerational equity. This course will also explore common misperceptions regarding endowments, student managed investments funds, and hot topics in the endowment investment industry.

Learning Objectives:

- Uniform Prudent Management of Institutional Funds Act (UPMIFA) requirements
- Endowment asset classes and alternative investments
- Endowment spending policies
- External pressures and common misperceptions regarding higher education endowments
- Student-managed investment funds
- Hot topics in the endowment investment industry

FIN 2252 — Finance and Accounting Essentials for Non-Accountants

Higher education administrators are increasingly expected to make informed decisions based on financial data, even when they do not have formal training in finance or accounting. This session, “Finance and Accounting Essentials for Non-Accountants,” is designed to demystify core financial concepts and provide participants with practical tools for understanding budgets, financial statements, and financial conversations within their institutions. The session emphasizes clarity, relevance, and real-world application, using higher-education-based examples and plain language to build confidence and financial fluency among non-financial professionals.

Learning Objectives:

- Explain basic finance and accounting terminology used in higher education.
- Identify the purpose and structure of key financial statements.
- Recognize how financial data informs institutional decision-making.
- Engage more confidently and effectively with finance personnel and senior leadership.

FIN 2253 — Financial Stability: Partnering Financial Aid with Financial Wellness and Basic Needs Support

In this session, we will cover the basics of the financial aid process and important regulations to be aware of. We will also cover the role that financial wellness and basic needs support can play in helping students achieve financial stability.

We will 1) Review the financial aid process (application-award-disbursement), 2) Review basic financial aid regulations (cost of attendance, awards, appeals, etc.), 3) Investigate financial issues for college students, 4) Explore financial wellness basics and basic needs support opportunities.

Learning Objectives:

- Explain the basic financial aid process
- Identify how financial wellness and basic needs intersect with financial aid
- Discuss how the FAFSA can be used to identify support opportunities in financial wellness and basic needs
- Identify three financial stability resources to support student success

FIN 2254 — In Pursuit of a CFO Job: Examining Fit and Mapping Out Your Career Path

This session begins with a presentation about the role of a chief financial officer. Elements presented include CFO characteristics versus how they are perceived, typical CFO portfolios, typical institutional organizational chart with issues by CFO peer area, relationships with the president and board, and CFO do's & don'ts. Following the presentation, the focus shifts to career planning using a career mapping tool. The presenter's career journey will be described demonstrating the reality that plans sometimes change when new opportunities arise. Following review and discussion of the presenter's career map, participants will use a digital template to:

--Document their career journey

--Identify a thought partner with whom to share their respective journeys

--Continue with the template by responding to questions to…

  *Establish a near-term or mid-term goal representing the individual's career aspiration

  *Identify actions needed to achieve the identified career aspiration

  *Identify resources which can support accomplishment of the actions

  *Identify specific steps with a timeline for their completion

--Continue the dialogue with the thought partner during which the career path will be shared

  *At the participants' option, schedule a contact with their thought partner 30 days out to establish a sense of accountability

<u>Learning Objectives:</u>

- Participants will know the typical duties of a chief financial officer along with the types of interactions they have with peers and stakeholders.
- Participants will be able to determine whether the chief financial officer position is something they are interested in pursuing. If it is not of interest, they will be able to focus on identifying the type of position to which they aspire.
- Participants will be able to develop a specific set of goals designed to move them toward (or achieve) the role they desire next.

FIN 2255 — Money Matters in Higher Ed: An Introductory Accounting & Finance Seminar

This seminar offers a practical, experience-driven look at how financial operations actually function within a college environment. Drawing from real-world leadership experience, the session explores the interconnected systems that drive institutional decision-making, including finance, human resources, scholarships, grants, and strategic planning.

Participants will gain insight into how departments are evaluated financially, how transparency and reporting inform leadership decisions, and how different funding sources—such as state appropriations, foundation accounts, and endowments—shape what is possible within an institution. The session also examines key operational challenges, including compensation structures, policy constraints, and the strategic use of resources to support hiring, student success, and program growth.

Through practical examples and candid discussion, the seminar highlights how colleges navigate complexity, balance competing priorities, and translate data into action. Designed for professionals seeking a deeper understanding of higher education operations, this session demystifies the financial and administrative landscape and provides a clearer view of how strategy is implemented in practice.

Learning Objectives:

- Identify and differentiate key funding sources and account types in higher education (e.g., state, foundation, endowment, and grant funds) and explain how their constraints shape institutional decision-making.
- Interpret and assess financial reports and operational data to understand departmental performance, resource allocation, and the role of transparency in supporting effective leadership decisions.
- Explain how financial, human resource, and operational factors intersect, including compensation structures, policy constraints, and funding strategies, to influence planning, hiring, and program outcomes.
- Apply foundational financial concepts and terminology to engage effectively with campus partners and contribute to informed, collaborative decision-making across functional areas.

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.

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

This course will explore ethics in higher education, the types of ethical issues we are most likely to face in our roles at our colleges and universities, and the “guardrails” in our personal and professional lives that influence how we act. Then we will study the relationship between ethics and fraud. Finally, we will discuss the types of fraud that are most prevalent in higher education and their associated loss as reported by the Association of Certified Fraud Examiners’ Report to the Nation on Occupational Fraud and Abuse. We will share recent examples of higher education fraud, go over the most common ways fraudsters attempt to cover it up and discuss the internal controls that should be implemented to help prevent it.

Learning Objectives:

- Understand how ethics influence day-to-day decision-making, shape individual roles at colleges and universities, and affect how the actions of others are interpreted within the institution.
- Recognize the critical role that college or university leadership plays in setting expectations, modeling ethical behavior, and fostering an ethical culture across the organization.
- Gain practical insight into concrete steps and strategies that can be taken to reduce the risk of fraud and promote accountability within individual areas of responsibility.

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 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 2300 — Federal Policy Impacting Institutions of Higher Education: What You Need to Know Now

This course will provide an overview of the federal policy landscape impacting institutions of higher education, including regulations impacting student loan limits, new accountability measures, and legislation being considered by Congress. Participants will discuss and consider how to prepare for additional changes as we enter the 2nd half of the second Trump administration, what policy changes may be considered in the Fall and into 2027, and how institutions of higher education engage with federal policymakers.

Learning Objectives:

- Understand the various pieces of legislation and federal regulations impacting institutions, and how to prepare for additional changes.
- Understand how the mid-term elections and change in Congress may impact policy and legislation, as well as how to engage with federal policymakers on these important issues.

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 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.

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

High-performing teams do not happen by accident, they are the result of intentional leadership, clear expectations, and consistent development. This session is designed for leaders who are responsible for building, developing, or leading teams and want practical strategies to improve performance, engagement, and accountability.

Participants will explore the core elements of productive teams, including role clarity, communication norms, trust, accountability, and alignment with organizational goals. The session examines how leadership behaviors directly influence team dynamics and outcomes, and how leaders can adapt their approach to meet the needs of diverse, cross-functional, remote, or hybrid teams.

Through guided reflection, real-world examples, and applied exercises, participants will assess their current team effectiveness, identify common barriers to productivity, and learn actionable strategies to strengthen team performance. Emphasis is placed on creating sustainable team practices that support results while fostering collaboration, ownership, and continuous improvement.

<u>Learning Objectives:</u>

- Identify the key characteristics and leadership practices of productive teams, including clear roles, effective communication, trust, and accountability.
- Assess team performance and dynamics to identify gaps, challenges, and opportunities for improvement using practical evaluation strategies.
- Apply proven leadership strategies to create, develop, and sustain productive teams, including setting expectations, supporting development, and driving results across different work environments.

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 work situations to achieve mutually beneficial outcomes.

<u>Learning Objectives:</u>

- Examine interest-based negotiation and why it is superior to traditional, generally ineffective adversarial negotiation processes for achieving collaborative outcomes.
- 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 case scenarios 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 2301 — Lead at Work, Thrive at Home: Managing Decision Fatigue

Lead at Work, Thrive at Home explores how decision fatigue impacts productivity, emotional well-being, leadership effectiveness, and relationships. Participants will learn practical Energy Management strategies, decision-making frameworks, and techniques for creating sustainable performance both at work and at home. As part of the experience, participants will receive a visual representation of accumulated decision tension and an engraved energy stone as a reminder to make intentional, energy-conscious decisions.

Learning Objectives:

- Be able to identify physical, emotional, and systemic contributors to decision fatigue in their professional and personal lives.
- Be able to distinguish between one-way and two-way door decisions to reduce unnecessary cognitive load and improve decision efficiency.
- Be able to apply the D.R.A.I.N. Energy Management Framework to diminish one energy drain and establish a sustainable action step.
- Develop a practical boundary and commitment strategy to protect energy and prevent burnout.

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.

<u>Learning Objectives:</u>

- 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.

<u>Learning Objectives:</u>

- 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.

PER 2306 — Accountability Made Practical: Tools Every Supervisor Needs

Supervisors across higher education - department heads, business officers, directors, and academic leaders, are increasingly responsible for managing employee performance and conduct, yet most have never been formally trained in the fundamentals of employee relations. This gap becomes especially risk in the current climate, where institutions are facing unprecedented challenges such as social media controversies, political expression issues, AI misuse, student boundary concerns, and evolving expectations for staff and faculty accountability. This session equips non-HR leaders with a clear, practical, and compliant framework for setting expectations, giving constructive feedback, and navigating progressive discipline for both staff and faculty. This session aims to demystify the "how" of people management - using real, timely higher education scenarios that supervisors are facing right now.

Participants will learn how to intervene early, document effectively, partner appropriately with HR, and uphold due process while protecting institutional integrity. This session empowers leaders to handle difficult conversations with confidence, fairness, and consistency, reducing institutional risk while strengthening campus culture.

Learning Objectives:

- Set clear, measurable, and reasonable performance expectations that improve workplace clarity and reduce conflict for both staff and faculty.
- Deliver effective constructive feedback that supports employee growth while addressing behavioral or performance issues proactively.
- Apply a structured, compliant approach to progressive discipline, including documentation, corrective action, and due process requirements (particularly for tenured faculty).
- Recognize high-risk scenarios and partner with HR appropriately to ensure consistency, risk mitigation, and adherence to institutional policy and law.

PER 2307 — Creating Buy-In: A Culture Code for Retaining High-Performers

Creating Buy-In: A Culture Code for Retaining High-Performers focuses on the human side of retention, engagement, and culture-building. Through storytelling, reflection, and experiential activities, participants will explore how leaders create environments where people feel seen, valued, and invested in a shared future. The session includes interactive activities designed to help attendees strengthen psychological safety, collective intelligence, and meaningful connection within their teams.

Learning Objectives:

- Develop a foundational understanding of how buy-in influences engagement, performance, and retention among high-performing staff and students.
- Be able to identify key leadership behaviors that build or erode trust, psychological safety, and commitment within teams.
- Gain practical strategies for creating and sustaining buy-in through clear purpose, consistent feedback loops, and shared ownership.

PER 2308 — From Entry-Level to Institutional Leader: Charting Your Path Through CBMI and Beyond

Career progression in higher education is rarely linear and requires intentional planning. This session is designed for early and mid-career professionals who want to move beyond role-based advancement and strategically position themselves for institutional leadership.

Participants will explore how the College Business Management Institute (CBMI) curriculum can be leveraged as a foundation for leadership growth across administrative, financial, operational, and executive pathways. Using a professional growth mapping approach, attendees will translate CBMI coursework and competencies into a clear, actionable career pathway aligned with institutional needs.

Through guided reflection and applied mapping activities, participants will assess their current career stage, identify leadership gaps, and develop a personalized plan that emphasizes visibility, strategic relationships, and intentional decision-making to support long-term leadership advancement.

Learning Objectives:

- Identify key competencies, experiences, and leadership behaviors required for institutional leadership roles and assess how their current roles and CBMI coursework contribute to leadership readiness.
- Develop a personalized career and leadership pathway that intentionally integrates CBMI learning, professional experiences, and future development opportunities into a long-term advancement strategy.
- Apply practical strategies to leverage CBMI participation beyond the classroom, including positioning credentials for promotion, expanding leadership visibility, and aligning professional growth with institutional priorities.

PER 2309 — Intentional Mentorship 101

This course demonstrates how structured mentorship can address staffing gaps, accelerate skill development, and strengthen institutional operations.

Participants will learn how intentional mentorship can be designed as a system rather than an informal practice, using clear roles, developmental goals, and repeatable processes to support early career, mid career, and senior staff. The session highlights practical mentoring frameworks that improve onboarding, reduce time to competency, and increase engagement across teams. While grounded in cybersecurity operations, the mentorship model is presented as transferable across IT, compliance, and administrative functions, offering actionable guidance for building sustainable talent pipelines and resilient teams in higher education.

Learning Objectives:

- Understand how intentional mentorship can be designed as a workforce strategy to address staffing challenges and skill gaps in higher education IT and cybersecurity.
- Identify key mentor roles, structures, and processes that enable students and early career professionals to contribute safely and effectively to operational environments.
- Learn how to build and scale a mentorship program that balances professional oversight with student autonomy and growth.
- Apply a practical framework for measuring the impact of mentorship programs on learning, behavior, retention, and operational outcomes.

PER 2310 — Planning Your Next Negotiation

How often do you step into a negotiation with little forethought about how you'll approach it or concrete ideas about what you hope to achieve or how you'll achieve it? Research and pedagogy on negotiations confirm that the most successful negotiators are planners. Before entering the negotiation, they thoroughly analyze their needs, the needs and possible resistance points of the other party, and the relationship dynamics and relative negotiation styles involved. They research to identify and argue for outcomes that are ambitious, yet fair and objective. And they consider how to turn disagreement into understanding and collaboration. What is your next negotiation? This session will provide practical tools for planning it to improve your effectiveness and chances for achieving what you want.

Learning Objectives:

- Examine a model for evaluating the negotiation situation based on the importance the negotiator places on achieving a specific outcome and on supporting their relationship with the other party to achieve that outcome.
- Walk through a step-by-step guide on key aspects of a successful negotiation, including needs, targets, bottom-line considerations, bargaining limits, and resistance points, and determine how each relates to the negotiator's current negotiation.
- Engage in analysis, reflection, and conversation with others to consider and receive input on how participants can approach their next negotiation with confidence and increased likelihood of success.

PER 2311 — Say the Thing: Navigating Difficult Conversations for Campus Business Leaders

Difficult conversations are unavoidable for campus business leaders: performance issues, missed deadlines, scope creep, budget surprises, conflicting priorities, vendor disputes, and classic misunderstandings. The problem is not the topic at hand but the fact that we avoid the difficult conversation until it becomes expensive, messy, and/or oddly theatrical. This session gives participants a practical, repeatable approach to planning and leading high-stakes conversations with business partners and colleagues across campus. Participants will learn how to get clear on the real issue, set the tone, deliver direct feedback without ruining relationships, handle defensiveness in real time, and end with aligned next steps and accountability. This is a skills-based course with guided practice, short scenarios grounded in higher ed business settings, and tools participants can reuse immediately.

Learning Objectives:

- Diagnose the conversation type needed (feedback, boundary-setting, conflict, accountability, negotiation) and choose the right approach for the goal and relationship.
- Plan and deliver a clear opening that frames the purpose, impact, and desired outcome without over-explaining or escalating tension.
- Use a structured conversation framework to keep discussions focused, factual, and forward-moving, even when emotions run high.
- Respond effectively to defensiveness and conflict behaviors (denial, blame-shifting, "yes but...", shutdown, and steamrolling) using de-escalation and redirection techniques.
- Close the loop with actionable next steps including documentation, timelines, roles, and follow-up methods that protect relationships and results.

2026 Refresher Only Courses

REF 3006 — Connecting Office Priorities to Institutional Mission Amid Change (Refresher Only Roundtable Discussion)

This facilitated roundtable refresher provides higher education professionals with dedicated space to align office-level priorities with broader institutional missions during times of change. Designed for an intimate group of up to 20 participants, the session builds on foundational strategic planning concepts through guided discussion, peer exchange, and applied reflection. Participants examine how institutional goals translate into daily decision-making, resource use, and team direction—leaving with greater clarity, shared understanding, and practical strategies for sustaining alignment across evolving contexts.

Learning Objectives:

- Examine how institutional mission and strategic priorities translate at the office or departmental level
- Discuss alignment challenges and opportunities during organizational change
- Identify practical adjustments to goals, priorities, or workflows that strengthen institutional alignment

REF 3007 — Washington Update for Higher Education Professionals (Refresher Only Roundtable Discussion)

The refresher course provides an update on the various legislation and administrative actions impacting higher education in the 2nd year of President Trump's second administration. The course will cover executive activities including regulatory actions and proposed rule, as well as legislation being considered on a variety of topics impacting institutions of higher education. Topics will include implementation of the "One Big Beautiful Bill", Title VI updates, international students, funding for federal programs, impacts of student visa policy on international enrollment, and more.

Learning Objectives:

- Summarize key federal legislative and administrative actions affecting higher education in the second year of President Trump's second administration.
- Identify major provisions of the One Big Beautiful Bill that impact institutions at a policy and regulatory level.
- Recognize current federal policy trends related to Title VI and DEI, international students and visa policy, and federal program funding.
- Discuss how institutions are responding to the evolving federal policy environment.

REF 3008 — What the One Big Beautiful Bill (OB3) Means for Students and the Higher Education Community (Refresher Only Roundtable Discussion)

This course will review many of the changes OB3 made regarding student financial aid and access to higher education. The class will review both undergraduate as well as graduate/professional students and review what programs have changed for students to finance their education.

Learning Objectives:

- Explain OB3-related changes to student financial aid and access to higher education.
- Describe how OB3 affects undergraduate and graduate/professional student funding, including loan programs.
- Apply this knowledge to campus conversations and student advising as OB3 changes are implemented.