



Ohio Association of College and University Business Officers

107th Annual Meeting & Professional Development Conference *Innovate, Transform, Grow*

Thursday, April 11, 2024 - Friday, April 12, 2024

Schedule of Events

Thursday, April 11, 2024

8:00 a.m. - 9:00 a.m.

EXHIBITOR SET-UP

9:00 a.m. - 10:00 a.m.

REGISTRATION / CONTINENTAL BREAKFAST / EXHIBITOR VISITS

10:00 a.m. - 11:00 a.m.

GENERAL SESSION: "Great Teams have Great Teammates"

Speaker: Sue Ramsey, Former Ashland University Girls Basketball Coach

11:00 a.m. - 11:10 a.m.

REFRESHMENTS BREAK / EXHIBITOR VISITS

11:10 a.m. - 12:00 p.m.

BREAKOUT SESSIONS

BREAKOUT SESSION #1: "Highlights of SECURE 2.0 and Other Regulatory Updates related to the 403b Landscape"

Speaker: James Scully, Senior Relationship Manager, TIAA; and Jeff Musell, Senior Director of Multiple Employer Plans, TIAA

BREAKOUT SESSION #2: "How to Recognize Phishing"

Speaker: Christopher Stocker, Director of Client Services, Compass Computer Group /PK Financial Group; Pete Kaplan, President, PK Financial Group; and Brian Petros, CEO, PK Financial Group

12:00 p.m. - 1:10 p.m.

BUFFET LUNCH / EXHIBITOR VISITS

Welcome/Remarks: Anne McCall, President of The College of Wooster

1:10 p.m. - 2:00 p.m.

BREAKOUT SESSIONS

BREAKOUT SESSION #1: “Fiscal Resiliency: Exploring Creative Solutions for Campus Challenges”

Speakers: Dave Capitano, Higher Education Practice Leader, Baker Tilly US, LLP; Tom Walenchok, Partner, Higher Education Practice, Baker Tilly US, LLP; and Karen Gries, Director, Exempt Tax Advisory, Baker Tilly US, LLP

BREAKOUT SESSION #2: “Artificial Intelligence: How we Got Here and What’s Next”

Speakers: Aneet Deshpande, Chief Investment Strategist, Clearstead; and Marlene Kanipe, Assistant Controller, College of Wooster

2:00 p.m. - 2:10 p.m.

REFRESHMENTS BREAK / EXHIBITOR VISITS

2:10 p.m. - 3:00 p.m.

BREAKOUT SESSIONS

BREAKOUT SESSION #1: “Industry Trends”

Speaker: C. Todd Jones, President and General Counsel, Association of Independent Colleges and Universities in Ohio (AICUO)

BREAKOUT SESSION #2: “Punching Above Your Weight: How to align technology strategy, staffing, and resources to achieve more than the sum of your parts”

Speaker: David Hinson, Campus Chief Information Officer, Apogee; and Megan Rosati, Business Development Director, Apogee

3:00 p.m. - 3:30 p.m.

REFRESHMENTS BREAK / EXHIBITOR VISITS

3:30 p.m. - 4:20 p.m.

GENERAL SESSION: “Higher Education Trends and Accounting Updates”

Speakers: Jonathan Schultz, Senior Manager, Crowe LLP; and Christine Torres, Audit Partner, Crowe LLP

4:30 p.m. – 6:30 p.m.

HAPPY HOUR (Sponsored by TIAA)

@ The Olde Jaol Steakhouse and Tavern (Prohibition Room), 215 N. Walnut Street, Wooster 44691

6:30 p.m.

DINNER ON YOUR OWN

Friday, April 12, 2024

8:00 a.m. - 9:00 a.m.

REGISTRATION / CONTINENTAL BREAKFAST

9:00 a.m. - 9:50 a.m.

BREAKOUT SESSIONS

BREAKOUT SESSION #1: "The "New" Zero-Based Budget: Transforming Institutions Through Data-Driven Resets"

Speaker: Jessica Ryals, Partner, CFO Colleague; and Jeff Spear, Founder, CFO Colleague

BREAKOUT SESSION #2: "Investments in Renewable Energy Tax Credits"

Speaker: Amanda Coon, Senior Tax Manager of Exempt Organizations, Plante Moran; and Jessica Toader, Senior Tax Manager of Exempt Organizations, Plante Moran

9:50 a.m. - 10:00 a.m.

REFRESHMENTS BREAK

10:00 a.m. - 10:50 a.m.

BREAKOUT SESSIONS

BREAKOUT SESSION #1: "Worth it? Prove it! - A survey of New and Impactful Higher Ed. Consumer Protection Obligations"

Speaker: Rob Kent, Senior Counsel, Bricker Graydon LLC; and Joshua Nolan, Partner, Bricker Graydon LLC

BREAKOUT SESSION #2: "Trends in College and University Closures"

Speaker: Adam Smith, FORVIS; and Jeff Spear, Founder, CFO Colleague

10:50 a.m. - 11:00 a.m.

BREAK

11:00 a.m. - 11:50 a.m.

GENERAL SESSION: "AI Risks and Opportunities in Higher Education"

Speakers: Mike Cullen, Principal, Higher Education Cybersecurity Leader, Baker Tilly US, LLP

11:50 a.m. - 1:00 p.m.

BUFFET LUNCH / BUSINESS MEETING / CLOSING REMARKS