

OACUBO Annual Meeting - DAY #2 SCHEDULE

FRIDAY, APRIL 16, 2021

9:00 a.m. – 12:00 p.m.

[3 total CPE Credits offered]

8:55 a.m. – 9:00 a.m.

OPENING REMARKS/INTRODUCTIONS

9:00 a.m. – 9:50 a.m.

SESSION #1: “Lessons Learned from ASU 2018-08 Implementation and Monitoring Continued Compliance” – Speakers: Pete Ugo and Jonathan Schultz, Crowe [1 CPE Credit]

This session will discuss changes, with a deep dive into ASU 2018-08. It will provide a detailed walkthrough of categorizing grants/contracts as either exchange transactions (contracts with customers under 606) or contributions (non-exchange transactions), as well as then determining when a contribution transaction is conditional or unconditional. The session will also include several examples and implementation guidance for institutions to prepare for and manage the impacts to their financial statements.

9:50 a.m. – 10:00 a.m.

BREAK

10:00 a.m. – 10:50 a.m.

SESSION #2: “The Paperless Campus: Business Process Optimization” – Speakers: Bill Dermody and Craig Bowe, GF Consulting; David Smith, Sr. and Brian Markovich, Mount Mary University [1 CPE Credit]

The session has two objectives; 1) to convey understanding of how other campuses are streamlining business processes to compete better and 2) to equip attendees with ideas and tools to effect change on their campus. Discussion will include the PaperDriven Campus and the business challenges we face; the drive for simplified, faster service to the campus community and the drive to reduce administrative costs. We will look at how peers across the country operate in the PaperLess Campus, including Student Services; Financial Aid Processing; HR Onboarding; and Faculty and Staff Services. We will discuss the challenges in Transition and what keeps us in the manual, paper-driven world including the complexity and Inertia of Legacy business processes; limitations of our legacy systems; and a lack of a Road Map. We will gain a better understanding of the Business Process Optimization (BPO) – knowing what to do, and how through the Scorecard and Report Card exercise and the BPO Workshop. Attendees will learn the 4 Keys to Successful Transition – doing it right with a Road Map – understand where you are going; ROI – build the business case; Start Simple, Start Successful; and Engage the Stakeholders.

10:50 a.m. – 11:00 a.m.

BREAK

11:00 a.m. – 11:50 a.m.

SESSION #3: “Powerful PowerPoint: Telling a Financial Story Using Imagery” – Speaker: Jonathan Volpe, Lorain County Community College [1 CPE Credit]

Many times, conveying a financial message is best told through charts/graphs or other imagery. This presentation is designed to go over some best practices for depicting financial information to non-financial staff as well as some common pitfalls that should be avoided when presenting.

11:50 a.m. – 12:00 p.m.

CLOSING REMARKS