

OACUBO Annual Meeting - DAY #4 SCHEDULE

FRIDAY, APRIL 23, 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: “Understanding the New Lease Accounting Standard (GASB 87)” – Speaker: Bob Malinowski, RSM US [1 CPE Credit]

This session will provide participants with an overview of the new lease standard, GASB 87, and explain how certain aspects of this guidance will affect the implementation effort and ongoing lease administration activities for colleges and universities that report under Governmental Accounting Standards. Upon completing this session, participants will be able to: Explain key concepts in the new lease standard (GASB 87) and significant differences from the legacy lease guidance; Identify an embedded lease within a service arrangement; Identify the critical lessons learned from public (non-governmental) companies that have adopted the new lease standard in order to appropriately plan for a successful implementation; and Describe the lease technology landscape in order to make more informed purchasing decisions.

9:50 a.m. – 10:00 a.m.

BREAK

10:00 a.m. – 10:50 a.m.

SESSION #2: “Title IX: Where Are They Now?” – Speakers: Melissa Carleton and Joshua Nolan, Bricker & Eckler [1 CPE Credit]

Final Title IX regulations are expected to change the way colleges and universities adjudicate sexual misconduct for students and employees on their campuses. What changes are coming, what does your campus need to do to prepare, and how might these changes affect your bottom line--for better or worse? How do the changes interact with increased Clery Act monitoring, which in turn will bring more potential fines to institutions? Join Bricker & Eckler attorneys Melissa Carleton and Josh Nolan as we work together to bring some clarity to the chaos and help you better define your to-do list.

10:50 a.m. – 11:00 a.m.

BREAK

11:00 a.m. – 11:50 a.m.

SESSION #3: “Alternate Investments: The Missing Piece in Portfolios?” – Speakers: Alex Shannon and Matt Shannon, Legacy Strategic Asset Management, Wells Fargo [1 CPE Credit]

Pensions, endowments and institutional investors have long incorporated investments, including hedge funds and private capital funds, in their asset allocation framework. Legacy Strategic Asset Management and the Wells Fargo Investment Institute believes in the importance of looking for ways to diversify portfolios and using strategies focused on unlocking value or complementing traditional allocation strategies.

11:50 a.m. – 12:00 p.m.

CLOSING REMARKS