

## FOCUS Spring 2017 Conference Agenda

Boar's Head Inn, Charlottesville, VA

### University of Virginia

#### MONDAY, APRIL 17<sup>TH</sup> (\*Indicates FOCUS Members only sessions)

10:00 AM – 2:00 PM

ARMICS Workgroup \* By invitation only  
*Pavilion I*

3:00 PM – 5:00 PM

Virginia CPA Ethics, 2017 Required Course – Mr. James D. Cole, CPA, CGMA  
*Pavilion III*

Mr. Cole will conduct a Virginia Society of Certified Public Accountants' session on ethics as required to maintain CPA licensure.

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#### TUESDAY, APRIL 18<sup>TH</sup> (\*Indicates FOCUS Members only sessions)

7:00 – 8:00 AM

Registration and Continental Breakfast  
*Prefunction Main Hallway*

8:00 – 8:10 AM

Welcome – LTC Kevin Ryan, VMI, Comptroller and FOCUS President  
*Pavilion I and II*

#### General Sessions

8:10 – 9:00 AM

**General Session I - Keynote Address** – Melody Bianchetto, Vice President for Finance, University of Virginia. *Envisioning the Future Finance Organization*  
*Pavilion I and II*

Ms. Bianchetto will open FOCUS with a discussion of an envisioned future finance organization. How do we transform our finance organizations to embrace change to become data-enabled, mission-centric, and valued business partners? How will we balance the increasing demands of compliance with advancing research, education, and service?

## **General Sessions (Continued)**

**9:10 – 10:00 AM**

**General Session II – Part I** – Jim Burke, Ph.D. & Linda Pierce, M.B.A., Performance Management Group, Virginia Commonwealth University. *Strategic Thinking with a Focus on Foresight and Visioning*

*Pavilion I and II*

Building off of sessions held at the Spring 2016 FOCUS meeting on managing ambiguity and change, this session is designed to help you think broadly about the factors and trends that may bring change into the work that you and your staff do. The facilitators will introduce the concept of strategic thinking and its four components, spending focused time on the elements of foresight and visioning.

**10:00 – 10:20 AM**

**Break**

*Prefunction Main Hallway*

**10:20 – 11:10 AM**

**General Session III – Part II** – Jim Burke, Ph.D. & Linda Pierce, M.B.A., Performance Management Group, Virginia Commonwealth University. *Evaluating Personal Tolerances for Change and Ambiguity*

*Pavilion I and II*

In small groups you will be encouraged to explore the trends facing the workplace of today and tomorrow that may influence what you do and the way that you do it. The facilitators will circle back to your personal tolerance for change and ambiguity and help you prepare for the future possibilities.

**11:20 – 12:10 PM**

**General Session IV – Department of Planning and Budget (DPB) Update** – Michael Maul, Associate Director, Education and Transportation, Department of Planning & Budget (DPB)

*Pavilion I and II*

Mr. Maul will provide updates from the Commonwealth's Department of Planning and Budget.

**12:10 – 1:30 PM**

**Lunch**

Kevin Larkin, Senior Vice President, Bank of America Merrill Lynch. *Fraud Update...Will You Be the Next Headline?*

*Pavilion III and Prefunction Main Hallway*

## **Concurrent Sessions** (\*Indicates FOCUS Members only sessions)

**1:30 – 2:20 PM**

A) **ARMICS Question and Answer with the Department of Accounts (DOA)** – Amanda Morris, DOA.

*Pavilion I and II*

Ms. Morris will provide updates in response to questions previously submitted by FOCUS.

**B) Bursar Roundtable\* – Led by Bruce Jenkins, Director, Cashiering and Student Accounts, Longwood University**

*Ednam Hall Room*

Mr. Jenkins will lead a discussion regarding current bursar topics of interest.

**C) Accounts Payable Roundtable\* – Led by Leigh Penn, Accounts Payable Manager and Laura Temple, Senior Accounts Payable Specialist, University of Mary Washington**

*Boardroom*

Discussions on current topics and general issues related to the accounts payable function.

**Concurrent Sessions (\*Indicates FOCUS only sessions)**

**2:30 – 3:20 PM**

**D) Risk Based Approach to Internal Audit – Carolyn Saint, CPA, CIA, CRMA, Chief Audit Executive, University of Virginia**

*Pavilion I and II*

Ms. Saint will describe the University's risk-based approach to the audit function and its multi-layered approach to internal controls.

**E) Bursar Roundtable\* – Led by Bruce Jenkins, Director, Cashiering and Student Accounts, Longwood University**

*Ednam Hall Room*

Mr. Jenkins will continue facilitating the discussion regarding current bursar topics of interest.

**F) Payroll Roundtable\* – Gloria Boone, Payroll Manager, Old Dominion University and Stella Parker, Payroll Operations Manager, Christopher Newport University**

*Boardroom*

Ms. Boone and Ms. Parker will lead a discussion regarding current payroll topics of interest.

**3:20 – 3:40 PM**

**Break**

*Prefunction Main Hallway*

**Concurrent Sessions (\*Indicates FOCUS only sessions)**

**3:40 – 4:30 PM**

**G) Cardinal Payroll Project Update – Stacy McCracken, Cardinal Project Manager and Kim White, Cardinal Application Manager, DOA**

*Boardroom*

An update on the Commonwealth's Cardinal Project and its current higher education status.

**H) Chrome River Implementation\* – Mark Angel, Associate Controller, Accounting Operations and Disbursements, JMU.**

*Ednam Hall Room*

Mr. Angel will lead a panel discussion about the experiences of several institutions' Chrome River implementations.

**I) GASB Update\* – Rob Churchman, CPA, CGFM, Partner, Cherry Bekaert  
*Pavilion I and II***

Mr. Churchman will provide updates on the GASB's activity and discuss the impacts to higher education.

**4:30 – 5:00 PM**  
**Primary Representative Meeting**  
*Pavilion III*

**5:30 – 6:30 PM**  
**Reception**  
*Hearth Room and Outside Patio*

**6:30 – 8:00 PM**  
**Dinner**  
*Pavilion III*

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**WEDNESDAY APRIL 19<sup>TH</sup>**

**7:00 – 8:00 AM**  
**Buffet Breakfast**  
*Pavilion III and Prefunction Main Hallway*

**General Sessions**

**8:00 – 8:50 AM**  
**General Session V – Washington Legislative Update – NACUBO – Megan Schneider, Assistant Director, Federal Affairs, NACUBO**  
*Pavilion I and II*

NACUBO's Megan Schneider will offer observations and analysis of major legislative and regulatory changes likely to be brought about by both the new Trump Administration and shifting Congressional priorities. Learn what impact those changes could have on your campus.

**9:00 – 9:50 AM**  
**General Session VI – DOA Update – Randy McCabe, CPA, CGFM, CGMA, Deputy State Comptroller.**  
*Pavilion I and II*

Mr. McCabe will provide an update on DOA activities and the upcoming year end closing and financial reporting schedules.

**10:00 – 10:50 AM**  
**General Session VII – Peter Blake, Director, State Council of Higher Education for Virginia (SCHEV)**  
*Pavilion I and II*

Mr. Blake will provide an update on the recent General Assembly session and the potential implications for higher education.

**10:50 – 11:10 AM**  
**Break**

*Prefunction Main Hallway*

**Concurrent Sessions** (\* Indicates FOCUS Members only sessions)

**11:10 – 12:00 AM**

- J) Enterprise Risk Management Roundtable – Jim Matteo, Associate Vice President and Treasurer, University of Virginia and Phil Porter, Director of University-Foundation Relations, University of Virginia**

*Pavilion I and II*

Mr. Matteo and Mr. Porter will lead a discussion on creating an Enterprise Risk Management (ERM) network for the Commonwealth's institutions of higher education.

- K) Panel Discussion on Enrollment Reporting for Student Aid Compliance\* – Scott Miller, Director of Financial Aid, University of Virginia and Dan Markowitz, Manager Data Integrity and Operations, National Student Clearinghouse.**

*Ednam Hall Room*

The University of Virginia will facilitate a panel discussion on enrollment reporting requirements and the APA's continuing focus in this area. Representatives from the Student Loan Clearinghouse and UVA's Student Financial Services and University Registrar's Office will be panelists.

- L) PCI DSS Update\* – Ron King, President, CampusGuard**

*Boardroom*

Mr. King will review current PCI-DSS compliance requirements and answer questions from the audience.

**12:00 - 1:00 PM**  
**Lunch**

*Pavilion III and Prefunction Main Hallway (With To Go Containers)*

**General Session**

**1:00 - 1:50 PM**

- Implementing a Comprehensive Approach to Cybersecurity – Jason Belford, Chief Information Security Officer, University of Virginia**

*Pavilion I and II*

Cyber crime is not just for TV and movies anymore. It profoundly affects our organizations and personal lives. Mr. Belford comes to us with current information on what the University of Virginia is now doing to combat cyber threats. He will demonstrate how this direction fundamentally reduces the cyber risks both in the workplace and at home. Mr. Belford will describe the University's approach to cybersecurity, describe current security concerns and cover the enhancements to security both implemented and planned for the University.

**1:50 - 2:10 PM**

**Wrap up – LTC Kevin Ryan, VMI, Comptroller and FOCUS President**

*Pavilion I and II*