FOCUS Fall 2014 Session Agenda
Wyndham Virginia Crossings Hotel and Conference Center, Glen Allen, VA
VIRGINIA COMMONWEALTH UNIVERSITY

Thursday, November 13th

7:00 – 8:00 am – Registration and Continental Breakfast (Henrico Pre-Function)

General Sessions

8:10 – 9:00 am

**General Session I - Keynote Address – Role of Chief Business Officer in Higher Education** – Mr. Bill Decatur, Senior Vice President of Finance and Administration, VCU  
*(Henrico Ballroom)*

Mr. Bill Decatur will discuss the evolving role of the Chief Business Officer at institutions of higher education.

9:10 – 10:00 am

**General Session II – Building and Restoring Trust** – Dr. Jean Gasen, Executive Director for the Center of Corporate Education, VCU – Sponsored by Nelnet Business Solutions  
*(Henrico Ballroom)*

Dr. Jean Gasen will lead an interactive session on building and restoring trust in the workplace.

10:00 – 10:20 am - Break

10:20 – 11:10 am

**General Session III– Building and Restoring Trust (Continued)** – Dr. Jean Gasen, Executive Director for the Center of Corporate Education, VCU  
*(Henrico Ballroom)*

Dr. Jean Gasen will continue leading an interactive session on building and restoring trust in the workplace.
11:10 – 12:00

**General Session IV – JLARC Update** – Ellen Miller, Chief Legislative Analyst, JLARC  
(Henrico Ballroom)  
Ms. Ellen Miller will provide an update on the JLARC review of higher education administrative and support services, as well as any information that is available on the final report.

12:00 – 1:10 pm – Buffet Lunch – Sponsored by Higher One and Political Update – Sponsored by Oracle

**Speaker starts at 12:20 – Dr. Bob Holsworth, President of Virginia Tomorrow**  
(Henrico Pre-Function and Henrico Ballroom)  
Dr. Bob Holsworth’s company examines emerging trends in politics, society and business. He will discuss the recent elections and the impact they could have on Virginia.

1:10 – 1:30 – Break for concurrent sessions room set-up

**Concurrent Sessions**

1:30 – 2:20 pm * Indicates FOCUS only sessions

A) **OMB Uniform Guidance** – Mark Roberts, Director of Grants and Contract Accounting at VCU, Annie Publow, Director of the Office of Sponsored Programs at VCU, and Tom Lex, Director of Revenue Reporting & Cost Accounting at GMU (Henrico Ballroom A)  
Mr. Mark Roberts, Ms. Annie Publow and Mr. Tom Lex will make a presentation on the OMB Uniform Guidance for Federal Awards and its impact on higher education

B) **Fixed Asset Roundtable*** - Nicole Hunter, Assistant Comptroller at CNU, and Dawn Schwartz, Manager of General Accounting and Financial Reporting at LU (Henrico Ballroom B)  
Ms. Nichole Hunter and Ms. Dawn Schwartz will lead a discussion on latest issues and best practices for fixed asset accounting

C) **Bursar Roundtable*** - Melinda West, Bursar at VT (Chesterfield Room)  
Ms. Melinda West will lead roundtable discussions on general Bursar issues

2:20 – 2:30 pm – Break
2:30 – 3:20 pm

D) **Accounts Payable Best Practices** - Sarah O’Neill, Travel and Reimbursement Manager at VCU, and Wendell Vest, Associate Controller – Accounting Operations at VT (Henrico Ballroom A)

Ms. Sarah O’Neill and Mr. Wendell Vest will lead a discussion on best practices in travel processing and reimbursement

E) **Bursar Roundtable** - Linda Combs, Director, University Business Office at JMU (Chesterfield Room)

Ms. Combs will lead roundtable discussions on general Bursar issues


Mr. Jimmy Rule will lead a discussion on NCAA financial reporting

3:20 – 3:30 pm – Break

3:30 – 4:20 pm

G) **Bit Coin** - Tim Quinlan Senior Economist at Wells Fargo (Chesterfield Room)

Mr. Tim Quinlan will be making a presentation on the following topics: Bit Coin functionality, global macroeconomic issues and foreign currency issues in the current financial market.

H) **Financial Reporting** - Randy Ellis, Senior Associate Comptroller at UVA, Barbara Starling, Financial Reporting Manager at VT, and Heather Seymour, Associate Controller at VCU (Henrico Ballroom A)

Mr. Randy Ellis, Ms. Barbara Starling and Ms. Heather Seymour will discuss the FY14 financial statement process and the audit.

I) **Effective Communications** – Jason Sayre, Director of Financial Management at Richard Bland (Henrico Ballroom B)

Mr. Jason Sayre will make a presentation on effective communications.

4:30 – 5:00 pm

Primary Representative Meeting (Henrico Ballroom A)

5:30 – 6:30 pm Reception – Sponsored by Wells Fargo (Henrico Pre-Function)

6:30 – 7:30 pm Dinner (The Glen Restaurant) – Sponsored by ConServe

7:00 – 8:30 pm Dessert and VCU Jazz Quartet – Sponsored by Wells Fargo (Henrico Pre-Function)
Friday, November 14th

General Sessions

7:00 – 8:00 am – Continental Breakfast (Henrico Pre-Function)

8:00 – 8:50 am
General Session V – Assessing Your Institution’s Financial Health Using the CFI – Larry Goldstein, President, Campus Strategies (Henrico Ballroom)
Mr. Larry Goldstein will cover the essential aspects of financial health assessment using ratios. This session will focus on the Composite Financial Index and its components.

8:50 – 9:40 am
General Session VI – APA Update - Martha Mavredes, Virginia Auditor of Public Accounts (Henrico Ballroom)
Ms. Martha Mavredes will provide an update on the latest developments at the APA.

9:40 – 9:50 am – Break

9:50 – 10:40 am
General Session VII – DOA Update - Randy McCabe, Assistant State Comptroller (Henrico Ballroom)
Mr. Randy McCabe will provide an update on recent activities at the Department of Accounts, including an update on the Cardinal implementation.

10:40 – 11:00 am – Break
Concurrent Session

11:00 – 11:50 am

J) Ratio Discussion – Larry Goldstein, President, Campus Strategies
(Henrico Ballroom A)
Mr. Larry Goldstein will present a hands-on session that allows participants to calculate their institution’s Composite Financial Index (CFI) utilizing their audited financial statements.

K) Accounts Payable Roundtable* - Leigh Penn, AP Manager at UMW, and Laura Temple, AP Specialist at UMW (Henrico Ballroom B)
Ms. Leigh Penn and Ms. Laura Temple will lead a roundtable discussion on latest issues and best practices in Accounts Payable.

L) Collections – Representative from Attorney General’s Office (Chesterfield Room)
The Attorney General’s Office will lead a discussion on best practices for collections.

11:50-12:30 pm  Lunch (The Glen Restaurant)

General Session

12:30-1:20 pm

General Session VIII – Developing a Department Enterprise Risk Management Model - James Matteo, Associate Vice President and Treasurer, UVA, and Gene Crouch, Senior Treasury Manager, UVA (Henrico Ballroom)
Mr. Matteo and Mr. Crouch will discuss how the University of Virginia’s Treasury Department adopted principles of institutional ERM initiatives and applied them to its department. Using the COSO framework as its model, UVA Treasury sought to proactively managing risk, capitalize on opportunities to improve processes and customer service, and enhance decision making and reporting. In this session, the UVA Treasury team will discuss its ERM effort, the model they used, and how the effort led to greater insight and decision making.

1:20-2:00 pm Wrap-up (Henrico Ballroom)