FALL 2012 FOCUS CONFERENCE AGENDA
Williamsburg, Virginia
November 13-14, 2012

Tuesday, November 13, 2012

7:00am - 8:15am  Conference Registration – Across from Empire Ballroom A, B & C
Breakfast (Location: Westminster Ballroom)

GENERAL SESSIONS:

8:15am – 8:30am  Opening Remarks – Sam Jones, Vice President of Finance (W&M)
Location: Empire Ballroom A, B & C

8:30am - 10:10am  Professional Development – Jim Burke (VCU) & Linda Pierce (VCU)
Location: Empire Ballroom A, B & C

Session Description: “Building Effective Teams to Achieve Results” - Leaders know that teamwork is an important means for increasing productivity, spurring innovation, and staying competitive. Yet, creating true teamwork can be difficult due to tensions created by competing priorities of departments and the overall responsibility of the larger institution. Learning the characteristics of high performance teams and understanding the essential qualities and skills that characterize successful college and university financial leaders can help you build on your team's strengths and increase performance.

10:10am - 10:40am  Break (Location: Hallway outside of Empire Ballroom A, B & C)

10:40am - 11:30am  Political Update – Dr. Robert Holsworth, President – Virginia Tomorrow
Location: Empire Ballroom A, B & C

Session Description: A discussion of the recent elections and the impact they could have on Virginia.

11:30am - 1:00pm  Lunch (Location: Westminster Ballroom)

1:00pm - 1:50pm  DOA Update – Randy McCabe, Assistant Comptroller
Location: Empire Ballroom A, B & C

Session Description: Department of Accounts will provide an update on activities of the department.

1:50pm - 2:10pm  Break (Location: Hallway outside of Empire Ballroom A, B & C)

CONCURRENT SESSIONS:

2:10pm - 3:00pm  A) AP Round Table I – SPCC & Travel Card (Jennifer Dellinger, JMU)
Location: Empire Ballroom - Parlor A  [FOCUS MEMBERS ONLY]

Session Description: A discussion based on operational considerations with the State’s Small Purchase Charge Card (SPCC) and travel card. Participants are encouraged to submit topics and questions to Jennifer at dellinqu@jmu.edu.

B) Bursar Round Table I – 1098T (Linda Combs, JMU)
Location: Empire Ballroom - Parlor B
Session Description: A discussion about 1098-T Tuition Statement reporting requirements. Participants are encouraged to submit topics and questions to Linda at combslc@jmu.edu.

C) Tax Update - (Dee Rich, KPMG)
Location: Empire Ballroom - Parlor C

Session Description: An update on higher education related tax topics.

3:00pm - 3:20pm Break (Location: Hallway outside of Empire Ballroom A, B & C)

3:20pm - 4:10pm D) AP Round Table II – Travel, Moving & Relocation (Ruth Gilliam, W&M)
Location: Empire Ballroom - Parlor A [FOCUS MEMBERS ONLY]

Session Description: A discussion about travel and moving & relocation topics. Participants are encouraged to submit topics and questions to Ruth at rgilliam@wm.edu.

E) Bursar Roundtable II – Collections by Attorney General (Laurel Huerkamp, Asst Attorney General, Chris Harris-Lipford, Sr. Asst Attorney General & Section Chief & Charlie Calton, Claims Rep.)
Location: Empire Ballroom - Parlor B

Session Description: The Attorney General's Office will provide an overview of the collections process, select applicable statutes, and the services provided by the Division of Debt Collection ("DDC"). There will be interactive discussions regarding what is required throughout the collection process, the referral of collection matters to DDC, and the progression of collection cases.

F) Financial Statement Round Table - (Randy Ellis, UVA)
Location: Empire Ballroom - Parlor C [FOCUS MEMBERS ONLY]

Session Description: A discussion concerning current reporting issues and observations from this year’s APA audit.

4:10pm - 4:40pm Primary Representatives Meeting (Location: Warwick Room)

5:30pm - 6:30pm Reception (Location: Westminster Foyer) sponsored by Higher One

6:30pm - 7:45pm Dinner (Location: Westminster Ballroom)

7:45pm Colonial Williamsburg - Walking Ghost Tour sponsored by Todd, Bremer & Lawson
Location: Meet in the Lobby of the Hospitality House (Don’t be late, the Ghosts Await!!)

Entertainment Description: We will take a short walk (approximately ¼ mile) to the Greenhow Lumber House located in Colonial Williamsburg. Please join us as we travel through the eerie streets of Colonial Williamsburg where the ghostly legends will come to life! Please be sure to wear comfortable shoes and don’t forget to bring your jacket and your pre-ordered Ghost Tour Ticket located in your name tag!
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Wednesday, November 14, 2012

7:30am – 8:30am   Breakfast (Location: Westminster Ballroom)

8:30am - 9:20am   Processing Efficiency – (Melanie O’Dell, ODU & Vanessa Walker, ODU & Cori Duck, ODU)
Location: Empire Ballroom A, B & C

  Session Description: A discussion about Old Dominion University’s Banner Revitalization experience. The session will discuss the process and the challenges and benefits in a revitalization effort.

9:20am - 9:40am   Break (Location: Hallway outside of Empire Ballroom A, B & C)

CONCURRENT SESSIONS:

9:40am - 10:30am  G) Bursar Round Table III – (Melinda West, VA Tech)
Location: Empire Ballroom - Parlor A  [FOCUS MEMBERS ONLY]

  Session Description: A roundtable discussion on topics including the following: Reporting Cash Payments of Over $10,000 (FORM 8300), International Boycott Report (FORM 5713), Administration of Student Health Insurance Plans, Handling of TIV authorizations – manual vs automated, Student acknowledgment of financial responsibility & collection charges – manual vs automated, Contract Management (loan services, collection agencies, banking, international payments, e-bill and payments, etc.), Handling International payments - incoming wires, Customer Service Strategies (call centers, automated email responses, FAQs, etc.). Please send other topics to mwest@vt.edu.

H) Enterprise Risk Management – (Beth Brock, GMU, Tricia Perkins, VCU & David Litton, VCU)
Location: Empire Ballroom - Parlor B

  Session Description: An overview of enterprise risk management (ERM) activities at their campus, including how the initiative was started, who is involved, what has transpired to date and what is on the horizon.

I) AP – Works Automation – (Vickie Chapman, UMW & Leigh Penn, UMW)
Location: Empire Ballroom - Parlor C

  Session Description: University of Mary Washington (UMW) recently implemented an online reconciliation process for the small purchase credit card. It converted paper log sheets, approvals and journal entries to one of electronic transaction coding, approvals and invoicing. UMW’s project plan included campus wide communications and upper management support; project advocates dedicated to specific areas of the community; small group training sessions for cardholders and supervisors; and coordinated roll out training documents, new card issuance, and rapid response to questions and concerns with the program. Vickie will share not only their successes, but those aspects of the project only made possible by sheer grit and solid determination of team members.

J) Fixed Assets Roundtable – (Dawn Schwartz, LU & John Hastings, LU)
Location: Yorktown Parlor (Lower Level)  [FOCUS MEMBERS ONLY]
Session Description: A roundtable discussion on the latest issues and best practices in the fixed assets area.

10:30am - 11:00am  Break (Location: Hallway outside of Empire Ballroom A, B & C)

11:00am - 11:50am SCHEV Update – Peter Blake, Director of SCHEV
Location: Empire Ballroom A, B & C

Session Description: A discussion concerning the legislative issues for the 2013 General Assembly.

11:50am – 1:00pm Lunch (Location: Westminster Ballroom)

1:00pm - 2:40pm Social Media – Patrick O’Malley (www.patrickomalley.com)
Location: Empire Ballroom A, B & C

Session Description: A discussion about Social media applications in a higher education environment.

2:40pm - 3:30pm Wrap Up Session
Location: Empire Ballroom A, B & C