MONDAY, APRIL 28TH
3:00 – 5:00 pm
ETHICS 2014 – YOUR LICENSE DEPENDS ON IT! – Jim Cole, CPA, VSCPA
Mr. Cole will conduct a Virginia Society of Certified Public Accountants session on ethics as required to maintain your CPA license.
Salon A

5:00 – 8:30 pm - EARLY ARRIVAL & REGISTRATION
** If you are arriving at the STONEWALL JACKSON HOTEL AND CONFERENCE CENTER, please stop by our registration table in the LOBBY where we will provide you with your conference materials and answer questions.

6:00 – 7:30 pm - RECEPTION - Hosted by Nelnet and MAXIMUS
Colonnade Room

TUESDAY, APRIL 29TH
7:00 – 8:00 am - REGISTRATION AND CONTINENTAL BREAKFAST
Lobby

General Sessions
8:30 – 9:30 am
GENERAL SESSION I – KEYNOTE ADDRESS - LEGAL ISSUES IN HIGHER EDUCATION – Mr. Jonathan Alger, President, James Madison University
Mr. Jonathan Alger, President of James Madison University, will be making a presentation on Current Legal Issues in Higher Education.
Shenandoah Room

9:30 – 10:20 am
GENERAL SESSION II - LEADERSHIP – Mark Warner, Sr. VP, Student Affairs and University Planning (JMU)
Dr. Mark Warner, Senior Vice President for Student Affairs and University Planning at James Madison University, will be making a presentation on Higher Education Leadership.
Shenandoah Room

10:20 – 10:40 am - BREAK
10:40 – 11:30 am

**GENERAL SESSION III – HIGHER EDUCATION IN THE 21ST CENTURY: VIRGINIA AND THE NATION - Dr. Laura Fornash, former Secretary of Education (UVA)**

Ms. Laura Fornash, Executive Assistant to the President at the University of Virginia and former Secretary of Education will share the state of higher education in the Commonwealth and review major trends.

*Shenandoah Room*

11:30 – 1:00 pm

**LUNCH & GENERAL SESSION IV - DOA UPDATE - Randy McCabe, Assistant State Comptroller (DOA)**

Mr. McCabe will provide an update on activities at the Department of Accounts.

*Shenandoah Room*

1:00 – 1:50 pm

**GENERAL SESSION V - DPB UPDATE – Michael Maul, Associate Director (DPB)**

Michael Maul will provide an update on the state budget and its impact on higher education.

*Shenandoah Room*

1:50 – 2:30 pm - **BREAK**

**Concurrent Sessions**

2:30 – 3:20 pm *indicates** **FOCUS only sessions.**

A) **PAYROLL – DIFFICULT ISSUES – Darrell Kozuch, Asst. Vice President for Human Resources (UVA)**

Darrell Kozuch, AVP for Human Resources, for the University of Virginia, will lead a discussion on payroll issues affecting colleges and universities. Issues will include IRS regulations and the Affordable Care Act.

*Salon A*

B) **ATHLETIC FINANCIAL REPORTING * – Jimmy Rule, Associate Controller Accounting and Reporting (JMU) and Jesse Horneber, Director, Financial Reporting (JMU)**

Presentation and Discussion on comparability issues among our school’s intercollegiate athletics’ reports (annually audited NCAA Reports). The session will begin to address proposed language in the 2014 appropriation acts requiring institutions to “develop a standardized reporting format for intercollegiate revenues and expenses.”

*Salon C*

C) **BURSARS’ PANEL I – 1098 T’s * – Patrick Quinn, Director of Student Fiscal Services (GMU) and Bruce Jenkins, Director, Cashiering and Student Accounts (Longwood)**

Discussion on best practices and concerns related to 1098 T’s.

*Salon B*
3:20 – 3:30 pm - **Break**

3:30 – 4:20 pm * indicates **FOCUS only** sessions.

D) **PROCUREMENT CONSORTIUM** – Eric Denby, Director of Procurement Services (UVA)
Mr. Denby will lead a discussion of the Virginia Association of State College & University Purchasing Professionals (VASCUPP). What is it? How does it benefit its members?

*Salon A*

E) **FIXED ASSETS** * – Jennifer Steele, Manager of Fixed Asset and Surplus Property (JMU)
Ms. Steele will lead a roundtable discussion on the latest issues and best practices in the fixed assets area. Participants are encouraged to submit topics and questions to Jennifer at steel2jl@jmu.edu.

*Salon B*

F) **BURSARS’ PANEL II – STUDENT REFUNDS, BURSAR POLICIES AND PROCEDURES** * – Roberta Fife, Director – Student Accounting (VCU) and Tanya Rojewski, Manager, Student Accounts/ Cashier (Radford)
Ms. Fife and Ms. Rojewski will lead a discussion on how and when to communicate important university policies to students, and Title IV compliance with processing refunds, including discussion of whether this process is handled internally or outsourced.

*Salon C*

4:30 – 5:00 pm - **PRIMARY REPRESENTATIVES MEETING**

*Blue Ridge Room*

5:30 – 6:30 pm - **RECEPTION** - Hosted by Higher One

6:30 – 8:00 pm - **DINNER**

*Shenandoah Room*

7:15 – 8:00 pm – **ENTERTAINMENT – THE OVERTONES – JMU**

*Shenandoah Room*

**Dessert bar following entertainment**
WEDNESDAY, APRIL 30TH

7:00-8:00 am - Breakfast Buffet - Colonnade and Market 24

8:00 am – 9:40 am
GENERAL SESSION VI – MILLENNIAL STUDENTS – Cara Meixner, Ph.D., Assistant Director, Center for Faculty Innovation (JMU)
Shenandoah Room

9:40 am-9:50 am
Break

Concurrent Sessions

9:50 am – 10:40 am * indicates FOCUS only sessions.

G) OMB UNIFORM GUIDANCE ON COST PRINCIPLES – Caroline Beeman, Senior Manager and Mira Levine, Manager (MAXIMUS Higher Education Consulting)
This session will focus on highlighting the changes made to federal cost principles, published within 2 CFR Part 200, on December 26, 2013. Topics will include changes to direct charging to grants, revisions to the utility cost adjustment (UCA), consolidation of the OMB Circulars and other pertinent issues. In addition, we will present the MAXIMUS assessment of the impact of these changes upon the preparation of F&A Proposals, compliance issues (e.g. DS-2, etc.).
Salon A

H) A/P ROUNDTABLE I* – Greg Swindell, University Comptroller, and Tanya Gillis, Accounts Payable Manager (W&M)
Discussion of the special handling of accounts payable checks, electronic disbursements, document imaging solutions and the tracking of non-resident aliens. Participants are encouraged to submit topics and questions to Greg at gaswindell@wm.edu.
Salon B

I) VRS HYBRID PLAN* – Barry Faison, CFO (Virginia Retirement System)
Barry Faison will provide an update on the VRS Hybrid Plan and will respond to questions submitted in advance. Please send questions to Beth Brock at ebrock1@gmu.edu.
Salon C

10:40 am – 11:00 am
Break

11:00 am – 11:50 am * indicates FOCUS only sessions.
A/P ROUNDTABLE II* – Greg Swindell, University Comptroller, and Sharon Harrington, Travel Account Manager (W&M)
Discussion of travel related topics. Discussion will cover the Banner Travel module, documentation requirements for personal versus state-provided vehicle travel, and research and athletic trips. Participants are encouraged to submit topics and questions to Greg at gaswindell@wm.edu.
Salon B

FINANCIAL REPORTING – VRS PENSION – Barry Faison, CFO (Virginia Retirement System)
Barry Faison will provide some background on the changes to financial statement reporting of pension liabilities that will be effective for FY155. He also will discuss any pending items and their implications. Mr. Faison will respond to questions submitted in advance. Please send questions to Beth Brock at e Brock1@gmu.edu.
Salon C

FINANCIAL AID - WHAT YOU DON’T EVEN KNOW YOU NEED TO ASK * – Sarah Doran, Assistant Director, Student Financial Services (UVA)
As the cost of education continues to increase, so does the need to provide information to families about financing options. Even if you don’t work directly in the financial aid office, it is important to understand your particular school’s philosophy about financial aid, and what it is “those people” do over there. We will have a brief discussion of why financial aid should matter to you, both professionally and personally, and how you can navigate the information and misinformation that surrounds financial aid. We’ll also go through some common buzzwords and calculations so that you’ll know what questions you might want to ask when you get back to your campus.
Salon A

11:50 – 1:00 pm – Lunch - Colonnade and Market 24

1:00 – 1:50 pm
GENERAL SESSION VII – VIRGINIA FINANCE UPDATE – Ric Brown, Virginia Secretary of Finance
Ric Brown will provide an update from the Secretary of Finance Office.
Shenandoah Room

1:50 pm – 2:00 pm
Wrap Up
Shenandoah Room
CPE Disclosure

The learning objective of the FOCUS meeting is to provide attendees with information useful to them in their positions within higher education fiscal operations. This includes updates on legislative and regulatory requirements, accounting principles and practices, and administrative systems and procedures.

Prerequisites and advance preparation are not required. The teaching method will be lecture and panel discussion.

The maximum number of CPE credits will be awarded based on each attendee’s completion of sessions and by submitting a CPE Credit and Evaluation Form at the conclusion of the meeting.