Spring 2013
FOCUS Spring 2013 Conference Agenda
Marriott Newport News at City Center
Newport News, VA

Monday, April 22

8:00am–9:30pm  Continental Breakfast for those attending:
Pearl Ballroom Foyer  FOCUS Pre-session: Compliance with PCI DSS

9:30am–5:00pm  FOCUS Pre-session: Compliance with PCI DSS
Pearl Ballroom II  FOCUS Members Only

2:00pm–6:00pm  Registration - Grand Ballroom Foyer

3:00pm–5:00pm  Ethics 2013-Your License Depends on It! - Jim
Pearl Ballroom I  Cole, CPA, VSCPA
Mr. Cole will conduct a Virginia Society of Certified Public
Accountants session on ethics as required to maintain your CPA
license.

5:15pm  Vans depart Marriott to CNU for 5:30 pm Tour

5:45pm  Vans pickup Marriott to CNU for 6:00 pm Tour

6:00pm-8:00pm  CNU Reception - David Student Union Boardroom
Hosted by Nelnet Business Solutions

7:30pm  Vans depart CNU to Marriott Hotel

8:00pm  Vans depart CNU to Marriott Hotel
Tuesday, April 23

7:00am-12:00 pm  Registration – Grand Ballroom Foyer

7:00am-8:15am  Breakfast – Pearl Ballroom Foyer
Hosted by MAXIMUS Consulting

General Sessions:
Pearl Ballroom

8:15am-9:10am  Revolutionizing an Institution - Bill Brauer, Executive Vice President, CNU
Mr. Brauer will provide an overview on the transformation of CNU.

9:10am-10:00am  DPB Update - Michael Maul, Associate Director, DPB
Mr. Maul will provide an update on the state budget and its impact on higher education.

10:00am-10:20am  Break

10:20am-11:10am  Leadership Wheel - Larry Goldstein, President, Campus Strategies
All individuals come to work with a set of strengths and challenges resulting from their operating style. Too often, they do not have the opportunity to identify the impacts that result from their preferred style. During this session, participants will complete a self-assessment instrument that will allow them to identify their particular strengths and challenges—both under normal and stressful circumstances. The session will also provide insights about the implications from their strengths and challenges.

11:10am-12:00pm  APA Update - Eric Sandridge, Audit Director-Higher Education, APA
Mr. Sandridge will provide a general update on the latest developments and upcoming plans at the Auditor of Public Accounts.
12:00pm–1:30pm  Lunch – Grand Ballroom

**Concurrent Sessions:**
FOCUS Members Only **

1:30pm-2:20pm  
A  Payroll VRS Modernization Roundtable**-  
Stephanie Kuebler, Payroll Operations Manager & Kay Shaw, Benefits Manager, CNU (*Pearl Ballroom III*)  
Ms. Kuebler and Ms. Shaw will lead a roundtable discussion on the latest issues related to VRS modernization.

B  Banner’s Travel & Expense Module 101 - Cori Duck, Accounts Payable Manager, ODU (*Pearl Ballroom II*)  
Ms. Duck will discuss how ODU set up the module; how it works with Banner, Drools Rules and Workflow; the implementation strategy and the challenges along the way.

C  GASB Update – Larry Goldstein, President, Campus Strategies (*Pearl Ballroom I*)  
Mr. Goldstein will discuss the latest GASB updates affecting higher education.

2:25pm-3:15pm  
D  AP Roundtable ** - Ruth Gilliam, Assistant Director-Operations, W&M (*Pearl Ballroom III*)  
Ms. Gilliam will lead a roundtable discussion on the latest issues and best practices in the accounts payable arena.

E  Bursar – Collections** - Tracey Mitchell, Manager-Student Accounts, CNU & Bruce Jenkins, Director-Student Accounts, LU (*Pearl Ballroom II*)  
Ms. Mitchell and Mr. Jenkins will lead a roundtable discussion on the latest issues and best practices in the A/R collections higher education environment.
F  Tax Update - Dee Rich, Partner, KPMG *(Pearl Ballroom I)*
Ms. Rich will provide an update on higher education related tax topics.

3:15pm-3:30pm Break

3:30pm-4:20pm G  VRS Modernization and Pension Reform -
Barry Faison, CFO, VRS *(Pearl Ballroom I)*
Mr. Faison will provide information on VRS modernization and Virginia Pension Reform, specifically changes coming as a result of the new hybrid plans.

H  Bursar Roundtable ** - Tracey Mitchell, Manager-Student Accounts, CNU & Bruce Jenkins, Director-Student Accounts, LU *(Pearl Ballroom II)*
Ms. Mitchell and Mr. Jenkins will lead a roundtable discussion on the latest issues and best practices in the A/R higher education environment.

I  Fixed Assets Roundtable ** - Bob Bussjaeger, Director-Final Financial Reporting, GMU *(Pearl Ballroom III)*
Mr. Bussjaeger will lead a roundtable discussion on the latest issues and best practices in the fixed assets area.

4:30pm-5:00pm Primary Representatives Meeting
*Pearl Ballroom I*

6:00pm-7:00pm Reception – Hosted by Higher One - Grand Ballroom Foyer

7:00pm-9:00pm Dinner & Entertainment by CNU Student Kevin Garcia, Jazz Combo - Grand Ballroom
Wednesday, April 24

7:00am-8:00am  Breakfast– Pearl Ballroom Foyer

**General Sessions:**
*Pearl Ballroom*

8:00am-9:40am  Emotional Intelligence - William Ritchey, Executive Director-Counseling & Health Services, CNU
Mr. Ritchey will provide an interactive session on working with emotional intelligence within the workplace.

9:40am-10:10am  Break/Checkout

10:10am-11:00am  Tax Exempt Bond Compliance - Kevin Davenport, Treasurer/Director-Treasury Services, VCU, Brian Winston, Assistant Controller, Tax/Accounting, VCU & Tricia Perkins, Assistant Vice President of Finance and University Controller, VCU
The IRS continues to scrutinize college and university compliance with federal rules and regulations governing tax-exempt bonds. In this session, we will present an overview of how to establish an effective policy on post-issuance tax-exempt bond compliance and provide a framework for developing and implementing the policy.

11:00am-11:10am  Break

**Concurrent Sessions:**
*FOCUS Members Only **

11:10am-12:00pm  J  Accounting and Reporting ** - Randy Ellis, Assistant Comptroller-Financial Reporting/Analysis, UVA & Dawn Schwartz, Senior Manager-Accounting & Financial Reporting, LU *(Pearl Ballroom I)*
K Where Did the Paper Go? – Scanning and Workflow –Wendell Vest, Associate Controller-Operations, VT, Stacy King, General Accounting Manager, VT, Leisa Shelor, Payroll Manager, VT (Pearl Ballroom II & III)

Virginia Tech Controller’s Office employees will discuss how the University uses scanning and workflow in their financial processes including accounts payable, travel, general accounting, payroll & human resources. The challenges of implementing a paperless process will be discussed.

12:00pm–1:20pm  Lunch – Grand Ballroom

12:30pm-1:20pm  General Session – DOA Update – Randy McCabe, Assistant State Comptroller, DOA

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

1:20pm-2:00pm  Wrap-Up Session – Grand Ballroom

Please see CPE Disclosure Below:

CPE Disclosure:

The learning objective of the Spring 2013 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.