

## FACILITATOR | MATT KELLY — CFO, ASSOCIATION FOR BIBLICAL HIGHER EDUCATION FORUM SPONSOR | CFO COLLEAGUE

Overview: Financial leadership for educational institutions is much more than making sure the numbers are right. It's knowing what the right numbers are and what they're saying about institutional viability and flourishing. It's both the science and art of prudent financial leadership . . . needed more than ever. Learn with other leaders how to serve your institution well during this turbulent time.

7:00 – 8:00 Forum Buffet Breakfast — Regency Foyer | Sponsored by Campus

8:00 – 8:15 Welcome & Introductions

### 8:15 – 9:30 SESSION 1 — NIMBLE & PRUDENT FINANCIAL LEADERSHIP FOR A TURBULENT AGE

Presenter: Jeff Spear | Founder, CFO Colleague (FL)

Overview: Our economy, culture and demographics are creating headwinds like never before. What conversations are presidents and CFOs having to ensure that the mission is accomplished while staying healthy? Founded in 2013 and having served over 150 institutions, CFO Colleague has seen just about everything. Are our strategies fit for the task before us? Learn from Jeff as he shares:

- ▶ What's working and what's not
- ▶ Critical data you need to know
- ▶ New ways of looking at the revenue life cycle of a student
- ▶ Rethinking programs to enhance efficiency and outcomes

9:30 – 10:15 Refreshment Break — Regency Foyer | Sponsored by Blackbaud

### 10:15 – 11:45 SESSION 2 — MULTI-YEAR BUDGETING AND FORECASTING

Presenter: Dan Campbell | Partner, CapinCrouse (IN)

Overview: Mature institutions are served by CFO's with the long view in mind. This includes budgeting for more than year-to-year operations. It includes careful forecasting based on current trends and projections. Consider insights from a financial leader about how to serve your institution with a longer horizon.

- ▶ The art and science of multi-year budgeting — looking ahead with numbers
- ▶ Transposing numbers into a forecast — projections that matter
- ▶ Scenario planning — charting implications of options

11:45 – 12:00 A word from our Sponsor — CFO Colleague

12:00 – 1:00 Buffet Lunch — Regency Foyer

### 1:00 – 2:15 SESSION 3 — KPI'S THAT EVERY CFO & PRESIDENT SHOULD TRACK & UNDERSTAND

Presenter: Jan Haas | Senior Partner, CFO Colleague (PA)

Overview: It's understood — the CFO is the institutional numbers person. But all numbers aren't created equal. What are the right key performance indicators (KPI's) that should be on the institutional dashboard of vital KPI's? Why should they be carefully tracked and analyzed? Sharpen your thinking and assess your dashboard with an expert leader in institutional financial management.

- ▶ Key Performance Indicators (KPI's) — what are they
- ▶ Choosing the right KPI's — what they are and why
- ▶ Listening to the right numbers — interpretation matters
- ▶ Sharing vital intel — with whom, when, and how

2:15 – 3:00 Refreshment Break — Regency Foyer | Sponsored by Alliance Defending Freedom

### 3:00 – 4:15 SESSION 4 — FINANCIAL INFORMATION SECURITY

Presenter: Matt Kelly | CFO, Association for Biblical Higher Education (FL)

Overview: With increasing consolidation of financial records onto digital platforms, what are the risks for security breaches? What are prudent measures for safe storage of institutional financial records? What is required by government and accrediting agencies for institutional integrity? Review your policies and procedures for security of your financial information with an experienced CFO and make sure your information is secure and you have mitigated institutional risk.

- ▶ Assessing the risk of financial information breach — vulnerabilities
- ▶ Principles & practices for information security — prudent measures
- ▶ Expectations & compliance — regulations & due diligence

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4:15 – 4:30 Wrap Up

6:00 – 8:30 CONNECTIONS DINNER — Ballroom B/C/D | Sponsored by Weave and In His Name HR