

# Financial Leaders Forum

February 11, 2026

Sponsored by — CFO Colleague

Presenter — Fred Johnson



## *Effective Financial Management in Higher Education*

**Overview:** The call for prudent financial management of institutions within biblical higher education has never been clearer. As more institutions of higher education have closed, the risks have climbed for failure in financial management and informed financial leadership by the president and board. It's time for both a reality check and a careful review of what effective financial management means for CFO's today.



**7:00 – 8:00 Forum Breakfast — Regency Foyer**

**8:00 – 8:15 Welcome & Introductions**

### **8:15 – 9:30 Session 1: The Essential Roles and Responsibilities of the CFO**

Review the important functions of the CFO as both financial leader and financial operations manager.

- Financial Reporting
- Fiduciary duties
- Accounting integrity and internal controls
- Risk management
- Cybersecurity matters
- Legal matters

**9:30 – 10:15 Refreshment Break — Regency Foyer**

### **10:15 – 11:45 Session 2: Building and Managing the Institutional Budget**

Starting with the creation of a realistic draft through the regular budget reporting cycles with leadership buy in, move your management of the institutional budget to a new level of financial management.

- Building the bridge from past financial history to future projections
- Key components to include in a budget
- Pairing the institutional budget to a sustainable business model
- Securing engagement and understanding with institutional leaders

**11:45 – 12:00 A word from our Sponsor**

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

### **1:00 – 2:15 Session 3: Tracking and Interpreting Key Performance Metrics**

Financial leadership by the CFO and their team includes the collection of the correct numbers along with understanding what's important to monitor. It's the financial dashboard that reflects the right KPI's. The CFO then carries the important role of interpretation with the institutional leaders – defining financial reality.

- Choosing the right metrics to track
- Knowing what these metrics show and why they're important – implications
- The art of interpretation – explaining metrics as the institutional financial reality

**2:15 – 3:00 Refreshment Break — Regency Foyer**

### **3:00 – 4:15 Session 4: Key Financial Measures and An Outside View**

Just like a wise physician understanding test results, a CFO understands the implications of key financial measures and ensures that the right leaders know the financial reality of the institution. This is a priceless gift by every CFO to their president, board, and external stakeholders. This is their ultimate duty to the mission fulfillment of the institution.

- Assessing and reporting key financial measures and ratios
- Interpreting the audited financial statement and insights from the auditor
- Timely and accurate external reporting
- Looking at the institution's financial health from the outside – public accountability

**4:15 – 4:30 Wrap Up**

**6:00 – 8:30 Connections Dinner — Ballroom B/C/D**

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