



2018 4th Annual HEIBO Conference
Embracing Financial Leadership in Global Education

October 1 - 3, 2018

AT&T Hotel and Conference Center
1900 University Avenue
Austin, Texas 78705

Conference Schedule
(Subject to Change)

Session Tracks

| | |
|--------------------------------|------------|
| International Student Services | ISS |
| Study Abroad | SA |
| Global Operations | GO |
| Plenary | P |



Spring 2015



Fall 2016



Fall 2017



Conference Hosts

Presentations are intended for educational purposes only. Statements and opinions expressed are those of the individual participants and, unless expressly stated, are not the opinions or positions of the Higher Education International Business Officers, its cosponsors, or its committees. HEIBO assumes no responsibility for the content, accuracy, or completeness of the information presented.

Day 1 - Monday, October 1, 2018

10:00 AM Registration Opens (luggage storage available)

11:30 AM Registration & Lunch

12:30 PM Welcome & Introductions from the University of Texas Austin International Office



Teri Albrecht, Interim Executive Director
Larry Phu, Director of Financial and Business Services

12:45 PM Opening Session

Texas VIP Panel Q&A

Local experts from our host state of Texas will answer prepared questions in their own field of expertise on hot topics of interest to international business officers. The audience will have time to add questions as well during this opening session of the conference.

Baylor University

JT Lloyd, Assistant VP for Student Accounts & Cashier Services
Bo White, Director of Study Abroad
David Alexander, Assistant General Counsel
Mark Bryant, Director of International Student and Scholar Services



Texas A&M

Pascale Parker, Study Abroad Interim Director
Bill Taylor, Director, International Student Services



University of Texas Austin

Margaret Y. Luévano, Interim Director, Int'l Student & Scholar Services
Heather Thompson, Director, Study Abroad
Mike Smith, Director, ESL Services



2:15 PM

Session

From Spreadsheets to Strategy

This session will give voice to members who are changing the way the roles of International Business Managers are viewed at their institutions as they become more strategic partners, business experts, and act as resources for expanding international activities.

Ben Fan, Dir Budgets and Personnel, Rutgers Global
Denise Gardiner, Dir of Finance and Administration, Int'l Affairs, Indiana University
Missy Peterson, Dir of Finance & Operations, Global Programs, University of Minnesota



3:00 PM Break

Day 1 - Monday, October 1, 2018 (continued)

3:15 PM

Breakout Sessions

Building the Ship While Sailing: Centralizing Study Abroad Financial Services

SA

This presentation, a case study from Baylor University, explores how centralization of financial services and student application processing improved scale, compliance and accessibility. The presentation will compare and contrast previous decentralized practices with a successful pilot program that standardized deposits, fee assessments and applications. Business process improvement, service levels, collaboration and technology adoption will be discussed.

Marie Burks, Financial Manager, Center for Global Engagement, Baylor University
JT Lloyd, Assistant VP for Student Accounts & Cashier Services, Baylor University



Building an ISSS Business Plan for Expanding Your Recruitment Team

ISS

In 2016, the University of Kentucky International Center developed a financial model to strategically utilize funding from university leadership for the purpose of expanding the international recruitment team. Sandee Huang will describe the features of the model that served the dual purposes of long-term planning and short-term operations and made possible the reenvisioning of a sustainable business plan for international recruitment and initiatives.

Sandee Huang, Budget Officer, University of Kentucky International Center



4:15 PM

Signature Session: TOOLBOX

Discovering Tableau

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Tableau is a powerful visual tool used to communicate information in a format some find superior to a spreadsheet or text table. See how this tool has been utilized at two different institutions to track enrollments in study abroad, international student admissions, passport operations, and student services. Creating compilation dashboards and reports are also functionalities of Tableau these institutions are exploring.

Tony Fussy, Accountant, GPS Alliance, University of Minnesota
Paul Butler, Director, Administration and Finance, Office of Int'l Services, Indiana University



4:45 PM

Daily Wrap-up

5:00 PM

Check into Hotel

5:30 PM

Gathering at Conference Hotel Bar for Drinks (cash bar)

6:15 PM

Depart for Dinner Cruise; Ubers/Lyfts

7:00 PM

Boarding Time for Dinner Cruise (cost included in registration fee)

Day 2 - Tuesday, October 2, 2018

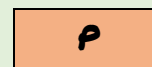
8:30 AM Breakfast

9:00 AM Session

Internal Audit: How to Be Prepared Like a Scout

Each of the four presenters has recently completed an internal audit and will share valuable experience and tips including identifying causes for internal audits, selecting and preparing documentation, meeting deadlines, and understanding the auditors' feedback.

Ratnesh Bhattacharya, Founder and Director, Global Positioning Strategies LLC
 Danette Bontrager, Business Manager, Study Abroad Center, Iowa State University
 Tony Fussy, Accountant, GPS Alliance, University of Minnesota
 Sandee Huang, Budget Officer, International Center, University of Kentucky



IOWA STATE UNIVERSITY



10:30 AM Break

10:45 AM Breakout Sessions

Roundtable: Lessons Learned Managing University Gateways Abroad

Many of our universities are operating offices abroad. During this discussion, panelists will share lessons learned around starting a gateway, as well as managing the hiring, compliance, banking, reporting, and tax implications of that presence abroad. These experts have also been charged with integrating that activity back to their University where policies and procedures are not always written with an international lens.

Alex Burch, Business Manager, Global Gateway Network, Indiana University
 Ben Fan, Director Budgets and Personnel, Rutgers Global
 Artemis Koch, Executive Director, Global Support Services, University of Pennsylvania
 Awilda Marquez, Financial Director, AU Abroad, American University
 Linda Montano, Senior Director of Business Operations, The Ohio State University



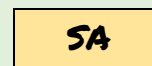
RUTGERS



Using Terra Dotta to Create Administrative Efficiencies

This session will demonstrate and discuss the capabilities of Terra Dotta for reporting, email, queries and workflow to create administrative efficiencies that increase clarity while reducing staff time and effort. This interactive session will include an opportunity for session attendees to share their suggestions, and questions with the panel.

Danette Bontrager, Business Manager, Study Abroad Center, Iowa State University
 Karen Wardzala, Assoc Dir of Finance & Business, Off of Global Ed, Georgetown University
 Amy Wasserman, Coordinator, College of L&P Studies, University of Pennsylvania



IOWA STATE UNIVERSITY



11:45 AM Lunch

Day 2 - Tuesday, October 2, 2018 (continued)

1:00 PM

Breakout Sessions

Quantifying Security Costs for Faculty-Led Programs

The presenters designed a survey to collect and analyze the costs of security and risk management products, services, and processes for faculty-led programs. They will present the survey data that helps quantify the drivers of these costs. The session will include group discussion about this emerging area of cost drivers and increasing costs for universities.

Alana Jones, Deputy Director, International Affairs, University of Colorado Denver
Leslie McCabe, Ed Abroad Program Mnger, Office of Int'l Affairs, The Ohio State University
Linda Montano, Senior Dir, Business Ops, Office of Int'l Affairs, The Ohio State University
Andrea Watson, Accounting Specialist, Rutgers Global

SA



From Static to Dynamic: Using the Google Platform to Manage Program Budgets and Tracking

This presentation will give participants insight into the evolution from Excel budget sheets to dynamic Google Sheets for tracking education abroad programs at the University of Maryland. The results include fewer errors and quicker access to information needed by program stakeholders. Technical information on setting up Google budget sheets to perform automatic data pulls will be included in the presentation.

Wil Biddle, Associate Director, Office of Int'l Affairs, U of Maryland
Alex Brosovich, Program Management Specialist, Office of Int'l Affairs, U of Maryland



2:00 PM

Roundtable

Justifying Fee Increases

Presentation and roundtable discussion on justifications for fee increases including use of software to track time and effort, strategies to deflect negative feedback when raising fees, and considerations for department vs student fees, all in light of the unique institutional policies on each campus.

Cathy Caine, Project Specialist, Int'l Programs & Services, University of Minnesota Duluth
Donna Lovell, Business Administrator, Texas A&M University
Nate Lynch, Accountant II, GPS Alliance, University of Minnesota



3:00 PM

Break

3:15 PM

Session

Innovate and Learn to Live Off Your Revenue

Two budget models that emphasize a positive bottom line (cash/surplus) will be presented. Elements included are using data to create projections, being prepared with a variety of budget tools, and building a pipeline that will diversify revenue streams.

Christine Greenberg, Dir Finance & HR, Study Abroad Office, U of North Carolina Chapel Hill
Mollie Khanna, Business Officer, Study Abroad, North Carolina State University



Day 2 - Tuesday, October 2, 2018 (continued)

4:15 PM

HEIBO 4th Official Business Meeting

Committee Member Reports - Conference Planning/Steering
Small Working Group Updates

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5:15 PM

Depart back to hotel

6:00 PM

Optional Activities (cost on your own)

Rainey Street - Dinner at Bangers Sausage House and Beer
East Austin Breweries
North Austin Breweries

Day 3 - Wednesday, October 3, 2018

8:30 AM Breakfast

9:00 AM Signature Session: BEST PRACTICES

Benchmarking Student Refund Processes and Policies

As part of HEIBO's commitment to developing the best financial practices for global higher education, this session begins the process of creating best practices by benchmarking student refund processes and policies. A panel of four HEIBO members will each present topical information on student refund and appeals in interactive sessions including ethics, policies, appeals and degrees of complexity. Within each topic, a case study will be presented followed by audience live polling and discussion. An expert peer group will be on hand to answer questions.

Wil Biddle, Associate Director, Office of International Affairs, University of Maryland
Cathy Caine, Project Specialist, Int'l Programs & Services, University of Minnesota Duluth
Mary Malone, Finance Manager, Health & Safety Crdntr, DIS - Study Abroad in Scandinavia
Awilda Marquez, Financial Director, AU Abroad, American University

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10:30 AM Break

10:45 AM Roundtable

How Does Your Program Measure Up? Making Data-Driven Decisions

Data-driven observations and conclusions allow standardized comparisons across programs and within programs from year-to-year. Over time, your programs' metrics will provide a reference for rapid evaluation of program performance. Qualitative data is imperative for making productive decisions about program viability and profitability. Roundtable members will discuss 1) financial KPI's and metrics, 2) student feedback on a broad range of program elements, 3) how to design an effective program evaluation model for university and departmental goals, 4) assessing program risk, and 5) assessing the degree of program operational efficiency while keeping a lens on ethical best practices.

Drew Cahan, Penn Global Director of Resource Management, University of Pennsylvania
Marsha Mallet, Dir of Financial Analysis, College of L&P Studies, University of Pennsylvania
Missy Peterson, Dir of Finance & Operations, Global Programs, University of Minnesota
Amy Wasserman, Coordinator, College of L&P Studies, University of Pennsylvania

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11:45 AM Wrap-up/Next Steps

12:00 PM Closing; Lunch (on your own)

2:00 PM Optional Walking Tour University of Texas Austin

International Office, Passport Office, and Campus

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