

NACCA 2023 Program Matrix

Delivery Method: Group Live
Advance Presentation: None

Session	Session Description - 1st Draft	Level of Education	Time	Category	Length (in minutes)	Prerequisites	Field of Study	Learning Objectives	Session Presenters (Name, Title, Institution)	
Pre-Conference 1/2 Day Workshop: Tuesday, November 28th										
W1	Navigating the Fringe: A How-To Guide on Benefit Rates	Fringe benefit rates are more than just numbers; they are a critical aspect of financial planning and compliance in higher education. This session navigates the fringe of benefit rates, providing insights into calculations, compliance challenges, institutional policies, and strategic considerations. Engage in hands-on scenarios, spirited discussions, and deep analyses with leading experts in the field. If you're looking to elevate your understanding of fringe benefit rates to the next level, this session will guide you through the complexities with clarity and confidence.	Intermediate	1:00 - 5:00 Refreshment Break 3:00 - 3:15	Costing	225	Basic understanding of the F&A process	Specialized Knowledge: Technical	Learn the basics of the Fringe Benefit calculation including the carryforward. Learn the advantages and disadvantages of pooled fringe benefit rates vs. specific identification. Learn from experts current issues in Fringe Benefit negotiations and their personal University experiences. Learn how to implement and model Fringe Benefit rates at your institution	Mira Levine, Jim Childers & Michael Muenier – Maximus, Jonathan Jeffries – Georgia Institute of Technology, Jennifer Carpenter - Iowa State University, Kimberly Hoebel - Purdue University
Day 1 - General Conference: Wednesday, November 29th										
<i>WELCOME TO NACCA - Las Vegas Together Again!</i>										
1	Planning and Managing the F&A Proposal Process	This session will provide strategies and ideas for planning and managing the process of submitting F&A cost proposals to the federal government. Topics will include development of a project plan, communicating with senior management, monitoring, and reviewing the proposal, and rate negotiation considerations.	Intermediate	8:00 - 8:15	Introductions and Information	15				
1	Planning and Managing the F&A Proposal Process	This session will provide strategies and ideas for planning and managing the process of submitting F&A cost proposals to the federal government. Topics will include development of a project plan, communicating with senior management, monitoring, and reviewing the proposal, and rate negotiation considerations.	Intermediate	8:15 - 9:15	F&A - IDC Costing	60	Basic understanding of the R&A process.	Specialized Knowledge: Technical	Understanding how to plan, monitor, and complete the F&A cost proposal and what are the different phases of the project. What resources are needed for the project and how to communicate and engage with senior management.	Chuck Wuensch - Maximus, Jonathan Jeffries - Georgia Institute of Technology
2	Building and Retaining a Team During Resignation and Retirement High Tide	The modern workplace faces unprecedented levels of staff turnover. In a sea of resignations and retirements, how do you build and retain a committed team in higher education? This beginner-friendly session explores succession planning, positive work environments, and employee engagement strategies. As the captain of your team's ship, discover the tools to steer through choppy waters with confidence.	Beginner	9:15 - 10:00	F&A - IDC Costing	45	None	Specialized Knowledge: Technical	Discuss current staffing environments and factors contributing to challenges in recruiting and retention of Costing staff. Hear from colleagues on their approaches, wins, and challenges in staffing. Take away ideas and strategies that appeal to and would fit in your organization. Bring forward your experiences to share and add to this important topic (interactive session)	Sharon Brooks - Atrium Health Wake Forest University Health Sciences, A. Chea Smith – Rutgers University
<i>Refreshment Break</i>										
3	Council on Governmental Relations (COGR) Update	Stay ahead of the curve with the latest updates and developments from the Council on Governmental Relations (COGR). This session provides insights into policy shifts, legislative changes, and compliance challenges that directly impact higher education. Engage in interactive discussions and bring your burning questions. Join us for an insider's tour that leaves no stone unturned!	Intermediate	10:30 - 11:30	Multi-topic Session	60	Basic understanding of Uniform Guidance, cost principles, F&A cost proposal development and regulatory compliance requirements	Specialized Knowledge: Technical	Participants will have a better understanding of COGR's mission. Participants will discuss and develop a better understanding of COGR's current activities and priorities and its strategies for addressing potential problematic Federal requirements, particularly those related to costing and cost reimbursement. Share knowledge of current compliance issues	Matt Owens
4	Asset Management/ Trends	Capital assets play a critical role in shaping the financial health of higher education institutions. In this intermediate session, we'll explore current trends, best practices, and strategic investments in capital asset management. Uncover innovative financial planning techniques and regulatory considerations through real-world examples. The game of Capital Asset Management has never been more thrilling!	Intermediate	11:30 - 12:30	F&A - IDC Costing	45	Basic knowledge of fixed asset cost accounting and F&A indirect cost calculations.	Specialized Knowledge: Technical	Optimizing building and equipment depreciation for F&A recovery. Best practices, current topics, and strategic investments. RFID technology for asset tracking and management.	Greg Sheehan, Mariana Traelita HCA, Andres Chan - University of Southern California
<i>Lunch</i>										
5	Best Practices in Surveys & Reporting	The session provides an overview of the various external research reports such as the National Science Foundation (NSF) Higher Education Research and Development (HERD) Survey and the Schedule of Expenditures of Federal Awards (SEFA) that are many times prepared by the Costing area at institutions. Hear the similarities, differences, and pain points in these key external reports and best practices for reconciling and reporting the data.	Beginner	1:45 - 2:45	Compliance/Audit	60	Basic knowledge of external research reporting data	Specialized Knowledge: Technical	Participants will learn: Purpose, audience, and reporting requirements for various external research reports - Key differences in the research metrics reported in external research surveys and financial reports - Best practices for efficiently and accurately reporting research-related expenditures and other data.	A. Chea Smith – Rutgers University
6	The effect of remote work flexibility on university research adminis, perception of overall job satisfaction and work-to-family conflict	Better understand what is driving the current move to remote in the costing and grants world	Intermediate	2:45 - 3:30	Multi-Topic Session	45	Basic understanding of the costing and grants work.	Specialized Knowledge: Technical	Explain the changes to the research administrator's work location that are happening across the US •articulate the benefits derived from a research administrator working remotely at least some of the time •Understand the measures used to evaluate the reported benefits	Julie Schwindt – The University of Mississippi Medical Center
<i>Refreshment Break</i>										
7	Impacts to F&A Bottom Line Given Remote Work	Remote work is redefining the way we approach Facilities & Administrative costs in higher education. This advanced session delves into high-level analyses of the challenges, opportunities, and adaptations required. Engage in scenario analyses, and spirited discussions. Decode the mystery and discover the future of remote work in F&A.	Advanced	4:00 - 5:00	F&A - IDC Costing	60	Basic understanding of the F&A rate proposal preparation and negotiation process.	Specialized Knowledge: Technical	Remote work has in many ways changed the way higher education institutions operate, particularly in the research and administration realms, creating new challenges and opportunities related to F&A costs. Our presentation will be aimed at helping individuals at higher education institutions identify these challenges and opportunities. The discussion will first uncover the areas at higher education institutions that have been impacted the most by remote work. From there, we will discuss ways to analyze the impact of remote work on F&A costs and the important institution specific factors to consider when preparing these analyses.	Chris Menzies, Vince Ludden - Attain, Steven Coffield - Oregon Health & Science University
<i>Vendor Fair</i>										

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Day 2 - General Conference: Thursday, November 30th										
Announcements										
8	How to Talk the Talk About IDC with Institutional Stake Holders, knowing your Executive priorities & managing expectations	Communicating Indirect Costs (IDC) effectively with executive stakeholders is a crucial skill. This intermediate session equips you with the language, strategies, and confidence to align priorities within the regulatory framework of higher education. Through lively discussions, get ready to talk the talk and walk the walk!	Intermediate	8:15 - 8:30 8:30 - 9:30	F&A - IDC Costing	60	Basic understanding of Uniform Guidance, cost principles, F&A cost proposal development and regulatory compliance requirements.	Specialized Knowledge: Technical	Key discussion points for Executive Stakeholders. Understanding the big picture. Managing expectations	Cathy Snider & Carrie Hurney - Huron, Danielle Powers - University of California-San Diego
9	DHHS - CAS Update	Stay abreast of the Department of Health and Human Services' cost allocation services with this advanced session. Uncover the latest changes, compliance requirements, and strategies for implementation. Engage with leading experts, ask questions, and explore scenarios. If you're a fan of deep dives and intricacies, this session is your treasure trove.	Advanced	9:30 - 10:15	Federal	45	Knowledge of 2 CFR, Part 200 - The Uniform Guidance, Appendix III	Specialized Knowledge: Technical	Participants will receive updates on the CAS team activities. Participants will gain knowledge about current issues impacting F&A rate proposals and negotiations	Michael Leonard, Steven Zuraf, & Olulola Oluborode - DHHS-CAS
Refreshment Break										
10	What is an F&A Space Survey? And How Do I Do One?	This session will describe the purpose, planning, and implementation of the F&A space survey. Topics will include planning, training, timing, department selection, and the different methodologies that are accepted by the Feds.	Beginner	10:15 - 10:45 10:45 - 11:45	F&A - IDC Costing	60	None	Specialized Knowledge: Technical	Gain a general understanding of the purpose of the F&A space survey, as well as different approaches to executing a space survey. Understand distinct definitions for types of activities in your space and how to document utilization of space. Learn how the space survey can benefit your institution even after you submit your F&A proposal.	Jennifer Smolnik: Maximus Higher Education Practice; Chelsea Moore, University of Illinois Systems
Lunch										
11	Service Centers	The creation and management of federally chargeable service centers are essential in today's higher education landscape. This beginner-friendly session offers a step-by-step guide to compliance, budgeting, and operational considerations. Let's build something amazing together!	Intermediate	1:00 - 2:15	F&A - IDC Costing	75	Knowledge of 2 CFR, Part 200 - The Uniform Guidance, Subpart E	Specialized Knowledge: Technical	Best practice to develop a new policy or revise institution's current policy, Routine review process and requirements, Key considerations when accepting external customers, Recommended billing practice	Michelle Scharden - Huron, David Beckstrom UCLA
Refreshment Break										
12	Extreme Makeover: Uniform Guidance 2 CFR 200 Edition - Proposed Revisions	On October 5, 2023, OMB published a proposal for a fundamental rewrite the Uniform Guidance 2 CFR 200. The White House announced that "the proposal will materially decrease the burden on recipients of Federal financial assistance, advance equity and job growth across the country, and meaningfully improve the administration of Federal financial assistance." This session will highlight the proposed changes and their impact on grant administration.	Intermediate	2:15 - 2:45 2:45 - 3:45	Federal	45	Knowledge of 2 CFR, Part 200 - The Uniform Guidance	Specialized Knowledge: Technical	General purpose of 2 CFR Uniform Guidance, major proposed revisions, their potential impacts, and their effective dates	Gil Tran - Attain
13	University Panel	Universities unite for a panel discussion that spans all skill levels. Engage in dynamic conversations that tackle key challenges, opportunities, and the future of higher education. From fresh-faced novices to seasoned veterans, this session brings together diverse perspectives for a rich and enlightening experience. Shape the future together!	Beginner	3:45 - 4:45	Multi-topic Session	75	None	Specialized Knowledge: Technical	Discussion on current issues & challenges from other institution perspectives.	Gina Hooten - Utah State University (Moderator), Steven Godfield - Oregon Health & Science University, Beverly Leeper - Clemson University, Tyrone Stephens - University of Arkansas Medical System
Announcements										
Day 3 - General Conference: Friday, December 1st										
14	Implementations - Lesson Learned	Implementing new systems or processes in higher education doesn't have to be daunting. This beginner-friendly session reflects on lessons learned, challenges overcome, and strategies for future success. Lively Discussion. Pack your curiosity and embark on a journey filled with enlightenment and excitement.	Beginner	8:00 - 8:30	Financial/Post Award/Business Operations	45	None	Specialized Knowledge: Technical	Learn considerations when implementing new systems or processes. This discussion will cover lessons learned, challenges overcome and strategies for implementation planning and key considerations and measurements of success.	Kari Kelly, Carrie Hurney - Huron, Julie Schwindt - University of Mississippi Medical Center
15	ONR	Join us for important updates from the ONR and come with your questions for an interactive session.	Intermediate	8:30 - 9:00	Federal	30	Participants should be aware of ONR's mission and structure as a Federal funding agency - as well as their role as a cognizant agency in the oversight and management of funding.	Specialized Knowledge: Technical	Participants will receive updates on the ONR activities. Participants will gain knowledge about current issues impacting F&A & fringe rate proposals and negotiations.	Beth Snyder, Betty Tingle - Office of Naval Research
16	Federal Panel	This is your chance to have your questions answered! A panel of representatives from the federal government will respond to your 'have to know' questions.	Intermediate	9:00 - 10:00	Federal	120	Knowledge of 2 CFR, Part 200 - The Uniform Guidance, Appendix III	Specialized Knowledge: Technical	Participants will directly interact with federal agency representatives on indirect and direct costing practices. Participants will gain deep insights to federal costing and regulatory positions. Participants will obtain direct responses and information to their questions to better clarify stewardship responsibilities	Moderator: Gil Tran - Attain, Michael Leonard, Steven Zuraf - DHHS-CAS, Beth Snyder, Betty Tingle - Office of Naval Research.
Refreshment Break										
16	Federal Panel	This is your chance to have your questions answered! A panel of representatives from the federal government will respond to your 'have to know' questions.	Intermediate	10:20 - 11:40	Federal	120	Knowledge of 2 CFR, Part 200 - The Uniform Guidance, Appendix III	Specialized Knowledge: Technical	Participants will directly interact with federal agency representatives on indirect and direct costing practices. Participants will gain deep insights to federal costing and regulatory positions. Participants will obtain direct responses and information to their questions to better clarify stewardship responsibilities	Moderator: Gil Tran - Attain, Michael Leonard, Steven Zuraf - DHHS-CAS, Beth Snyder, Betty Tingle - Office of Naval Research.
CONFERENCE CLOSE										