



2023 CONFERENCE PROGRAM

Day 1: Pre-Conference Workshops

Tuesday, November 28th:

10:00 a.m. – 5:00 p.m. Registration for Pre-Conference Workshops & Main Conference Sessions

1:00 – 5:00 p.m. Workshop – Evolution Room

W-1: Navigating the Fringe: How to Guide on Benefit Rates

Presenters: Mira Levine, Jim Childers, & Michael Muenier – Maximus Consulting, Jonathan Jeffries – Georgia Institute of Technology, Jennifer Carpenter – Iowa State University, & Kimberly Hoebel – Purdue University

Description: Fringe benefit rates are more than just numbers; they are a critical aspect of financial planning and compliance in higher education. This workshop will navigate the advantages/disadvantages of pooled fringe benefit rates, walk participants through the fringe benefit calculations, modeling, compliance, and negotiation challenges as well as provide a how-to for implementing fringe at your institution. Participants will engage in hands-on scenarios, lively discussions, and deep analyses with both consulting and university experts.

Workshop Level: Intermediate

Prerequisites: Basic understanding of the fringe benefits

Learning Objectives:

- 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 the current issues in Fringe Benefit negotiations and their personal University experiences.
- Learn how to implement and model Fringe Benefit rates at your institution.

(3:00p.m. – 3:15p.m. 15-minute refreshment break)



2023 CONFERENCE PROGRAM

Day 1: Main Conference – General Sessions

Wednesday, November 29th: Social A Room

7:00 a.m. – 5:00 p.m. Registration and Information Table Open

6:30 a.m. – 8:00 a.m. Hot Breakfast Buffet - Social B & C Room (Newcomers – Look for the reserved 1st time attendee tables with the NACCA table tents to meet and greet!)

8:00 a.m. - 8:15 a.m. Welcome to NACCA – Las Vegas!
Opening Remarks/Housekeeping: *Your 2023 Conference Committee*

8:15 a.m. - 9:15 a.m. S-1: Planning and Managing the F&A Proposal Process
Presenters: Chuck Wuensch - Maximus Consulting, Jonathan Jeffries – Georgia Institute of Technology

Description: 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.

Session Level: Intermediate

Prerequisites: Basic understanding of the F&A process.

Learning Objectives:

- 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.

9:15 a.m. – 10:00 a.m. S-2: Building and Retaining a Team During Resignation and Retirement High Tide

Presenters: Sharon Brooks - Atrium Health Wake Forest University Health Sciences, A. Chea Smith – Rutgers University

Description: 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



Day 1: General Sessions-Continued

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.

Session Level: Beginner

Prerequisites: None

Learning Objectives:

- 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)

10:00 a.m. – 10:30 a.m. Refreshment Break

10:30 a.m. - 11:30 a.m. S-3: Council on Governmental Relations (COGR) Update
Presenter: Matt Owens - COGR

Description: 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!

Session Level: Intermediate

Prerequisites: Basic understanding of Uniform Guidance , cost principles, F&A cost proposal development and regulatory compliance requirements

Learning Objectives:

- 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



Day 1: General Sessions-Continued

11:30 a.m. – 12:30 p.m. S-4: Asset Management /Trends

Presenters: Greg Sheahan & Mariana Traetta - HCA, Andres Chan - University of Southern California

Description: 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!

Session Level: Intermediate

Prerequisites: Basic knowledge of fixed asset cost accounting and F&A indirect cost calculations.

Learning Objectives:

- Optimizing building and equipment depreciation for F&A recovery.
- Best practices, current topics, and strategic investments.
- RFID technology for asset tracking and management.

12:30 p.m. – 1:45 p.m. *Buffet Lunch – Social B & C Room*

1:45 p.m. –2:45 p.m. S-5: Best Practices in Surveys & Reporting

Presenter: A. Chea Smith – Rutgers University

Description: This 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, & pain points in these key external reports and best practices for reconciling and reporting the data.

Session Level: Beginner

Prerequisites: Basic knowledge of external research reporting data



Day 1: General Sessions-Continued

Learning Objectives:

- 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

2:45 p.m. – 3:30 p.m. S-6: The effect of remote work flexibility on university research admins, perception of overall job satisfaction and work-to-family conflict
Presenter: Julie Schwindt – The University of Mississippi Medical Center

Description: Better understand what is driving the current move to remote in the costing and grants world.

Session Level: Intermediate

Prerequisites: Basic understanding of the costing and grants work.

Learning Objectives:

- 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.

3:30 p.m. – 4:00 p.m. Refreshment Break

4:00 p.m. – 5:00 p.m. S-7: Impacts to F&A bottom line given remote work.
Presenter: Chris Menzies & Vince Ludden – Attain, Steven Cofield - Oregon Health & Science University

Description: 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.

NACCA

National Conference on College Cost Accounting
Leading Excellence in Research Costing Practices
Day 1: General Sessions-Continued

Session Level: Advanced

Prerequisites: Basic understanding of the F&A rate proposal preparation and negotiation process.

Learning Objectives:

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.

5:30 p.m. – 7:30 p.m. – Networking Event – The Wheelhouse (adjacent to the High Roller)

(Heavy Hors D'oeuvres and Drinks)

Network with colleagues and interact with our sponsors for valuable information about products and services available to assist your institution in addressing issues related to college cost accounting and several compliance responsibilities. This is always a wonderful opportunity to network, reconnect, enjoy refreshments, and express our thanks to our conference sponsors!

Thank you to HCA Asset Management for sponsoring our fabulous networking event!!!!





Leading Excellence in Research Costing Practices

Day 2: Main Conference – General Sessions

Thursday, November 30th: Social A Room

6:30 a.m. – 8:15 a.m. Hot Breakfast Buffet - Social B & C Room

8:15 a.m. - 8:30 a.m. Housekeeping/Announcements

8:30 a.m. – 9:30 a.m. S-8: How to Talk the Talk About IDC with Institutional Stake Holders: Knowing Your Executive Priorities & Managing Expectations

Presenters: Cathy Snyder & Carrie Hurney – Huron Consulting, Danielle Powers – University of California-San Diego

Description: 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!

Session Level: Intermediate

Prerequisites: Basic understanding of Uniform Guidance, cost principles, F&A cost proposal development and regulatory compliance requirement.

Learning Objectives:

- Key discussion points for Executive Stakeholders
- Understanding the big picture
- Managing expectations

9:30 a.m. – 10:15 a.m. S-9: DHHS CAS - Update

Presenters: Michael Leonard, Steven Zuraf, & Olulola Oluborode – DHHS-CAS

Description: Stay abreast of the Department of Health and Human Service-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.

Session Level: Advanced

Prerequisites: Knowledge of 2 CFR, Part 200 – The Uniform Guidance, Appendix III



Leading Excellence in Research Costing Practices

Day 2: General Sessions - Continued

Learning Objectives: Participants will receive updates on the CAS team activities, Participants will gain knowledge about current issues impacting F&A & fringe rate proposals and negotiations.

10:15 a.m. – 10:45 a.m. Refreshment Break

10:45 a.m. – 11:45 a.m. S-10: What is an F&A Space Survey? And How Do I Do One?

Presenters: Jennifer Smolnik; Maximus Higher Education Practice; Chelsa Moore, University of Illinois Systems

Description: 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.

Program Level: Beginner

Prerequisites: None

Learning Objectives: 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.

11:45 a.m. – 1:00 p.m. Buffet Lunch- Social B & C Room

1:00 p.m. – 2:15 p.m. S-11: Service Centers

Presenters: Michelle Schardein – Huron, David Beckstrom – University of California-Los Angeles

Description: 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!

Session Level: Intermediate

Prerequisites: Knowledge of 2 CFR, Part 200 – The Uniform Guidance, Subpart E



Leading Excellence in Research Costing Practices

Day 2: General Sessions - Continued

Learning Objectives:

- 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

2:15 p.m. – 2:45 p.m. Refreshment Break

2:45 p.m. – 3:45 p.m. S-12: Extreme Makeover: Uniform Guidance 2 CFR 200 Edition – Proposed Revisions

Presenter: Gil Tran, Senior Specialist Leader, Attain - OMB Emeritus

Description: 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.

Session Level: Intermediate

Prerequisites: Knowledge of 2 CFR, Part 200 – The Uniform Guidance

Learning Objectives:

- General purpose of 2 CFR Uniform Guidance.
- Major proposed revisions, their potential impacts, and their effective dates.

3:45 p.m. – 4:45 p.m. S-13: University Panel

Presenters: Gina Hooten - Utah State University (Moderator), Steven Cofield - Oregon Health & Science University, Beverly Leeper - Clemson University, Ty Stephens – University of Arkansas Medical Center

Description: 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!

Session Level: Beginner

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Day 2: General Sessions - Continued

Prerequisites: None

Learning Objectives: Discussion on current issues & challenges from other institution perspectives.

4:45 p.m. - 5:00 p.m. Announcements

WEAR YOUR SCHOOLS COLORS ON FRIDAY!!!

Day 3: Main Conference – General Sessions

Friday, December 1st: Social A Room

6:30 a.m. – 8:00 a.m. Hot Breakfast Buffet – Social B & C Room

8:00 a.m. – 8:30 a.m. **S-14: Implementations – Lesson Learned**

Presenters: Kari Kelly, Carrie Hurney - Huron, Julie Schwindt - University of Mississippi Medical Center

Description: 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.

Session Level: Basic

Prerequisites: None

8:30 a.m. – 9:00 a.m. **S-15: ONR - Update**

Presenters: Beth Snyder, Betty Tingle – Office of Naval Research

Learning Objectives:

Join us for important updates from the ONR and come with your questions for an interactive session.

Session Level: Intermediate

Prerequisites: Knowledge of 2 CFR, Part 200 – The Uniform Guidance, Appendix III



Day 3: General Sessions – Continued

Learning Objectives:

Participants will receive updates on the ONR activities, Participants will gain knowledge about current issues impacting F&A & fringe rate proposals and negotiations.

9:00 a.m. – 10:00 a.m. S-16: Federal Panel- Pt 1

Moderator: Gil Tran – Attain, Michael Leonard, Steven Zuraf - DHHS-CAS, Beth Snyder, Betty Tingle – Office of Naval Research

Description: 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.

Session Level: Intermediate

Prerequisites: Knowledge of 2 CFR, Part 200 – The Uniform Guidance, Subpart F

Learning Objectives:

- 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

10:00 a.m – 10:20 a.m Refreshment Break

10.20 a.m. – 11:40 a.m. S-16: Federal Panel- Pt 2

11:40 a.m. [Wrap Up](#) and Conference Adjournment



Special Thanks to the Following:

NACCA Leadership Team:

**Sharon Brooks, Atrium Health Wake Forest University Health Sciences
Chea Smith, Rutgers, The State University of New Jersey
Andres Chan, University of Southern California**

Your 2023 NACCA Conference Program Committee:

**Bobby Markham, South Dakota State University – Program Committee Chair
Kimberly Hoebel, Purdue University
Shelly Benson, University of Illinois Urbana-Champaign
Danielle Powers, University of California – San Diego
Julie Schwindt, University of Mississippi Medical Center**

Thank you to Kati Barber & NCURA for assistance & guidance with the CPE certifications process!

Our 2023 NACCA Sponsors:





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Advance Preparation: 2 CFR, Part 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards

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