



## AJCU Finance Officers and General Counsel

### CONFERENCE AGENDA

# AJCU|2018

The Historic Davenport Hotel  
10 South Post Street, Spokane WA

April 24 - 27, 2018

#### TUESDAY, APRIL 24, 2018

TIME		LOCATION
4:00 – 7:00 pm	<b>Registration</b>	Elizabethan Ballroom, 2 <sup>nd</sup> floor
6:30 – 11:00 pm	<b>Welcome Reception:</b> <i>Hors d'oeuvres and Cocktails</i>	Elizabethan Ballroom, 2 <sup>nd</sup> floor

#### WEDNESDAY, APRIL 25, 2018

TIME		LOCATION
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##### GOLF TOURNAMENT:

6:15 am	<b>Breakfast</b>	TBD
7:00 am	<b>Bus departs</b>	Lobby
8:00 am	<b>Golfers Arrive:</b> <i>Outfitting/Practice Tees</i>	Coeur d'Alene Resort Golf Course 900 S Floating Green Coeur d'Alene, ID
9:00 am – 3:00 pm	<b>Golf Tournament, Lunch &amp; Awards</b>	Coeur d'Alene Resort Golf Course
3:00 pm	<b>Bus returns to The Historic Davenport Hotel</b>	

##### HISTORIC SPOKANE TOUR:

6:15 am – 8:30 am	<b>Breakfast</b>	Isabella Ballroom, 1 <sup>st</sup> floor
8:30 am – 3:00 pm	<b>Historic Spokane Tour &amp; Lunch</b>	Isabella Ballroom, 1 <sup>st</sup> floor
3:00 – 5:30 pm	<b>Registration</b>	TBD
5:45 pm	<b><i>Gather to walk to opening dinner event</i></b>	Lobby
6:00 pm – 8:00 pm	<b>Opening Dinner Event</b> 6:00 pm – Social 7:00 pm – Dinner	Martin Woldson Theater at the Fox 1001 W Sprague Ave Spokane, WA
8:00 pm – 11:00 pm	<b>Hospitality Event</b>	Martin Woldson Theater at the Fox 1001 W Sprague Ave Spokane, WA

THURSDAY, APRIL 26, 2018

TIME		LOCATION
6:00 am	<b>Guided Walk or Run: Discover Downtown!</b>	Lobby
7:00 am – 12:00 pm	<b>Registration</b>	TBD
7:30 am	<b>Mass – Fr. Pat Lee, S.J., Vice President for Mission, Gonzaga University</b> <b>All are welcome</b>	Cutter Room, 2 <sup>nd</sup> floor
7:30 am – 8:30 am	<b>Breakfast</b>	Isabella Ballroom, 1 <sup>st</sup> floor
8:30 am – 8:40 am	<b>Welcome &amp; Introductions</b> Maureen McGuire, <i>General Counsel, Gonzaga University</i> Chuck Murphy, <i>Chief Strategy Officer, Gonzaga University</i> Joe Smith, <i>Chief Financial Officer, Gonzaga University</i>	Marie Antoinette Ballroom, 2 <sup>nd</sup> floor
8:40 am – 9:30 am	<b>JOINT SESSION 1:</b> <b>The AJCU: Building an Effective Network for Advancing Mission</b> Dr. Stephanie Russell, <i>Vice President and Consultant for Mission Integration, AJCU</i>	Marie Antoinette Ballroom, 2 <sup>nd</sup> floor
9:30 am – 10:30 am	<b>JOINT SESSION 2:</b> <b>Fiduciary Duties of the Governing Board and Consequential Governance*</b> Shannon McCambridge, JD, LLM, <i>Executive Search Consultant, Association of Governing Boards of Universities and Colleges</i>	Marie Antoinette Ballroom, 2 <sup>nd</sup> floor
10:30 am – 10:45 am	<b>Break</b>	
10:45 am – 11:45 am	<b>JOINT SESSION 3:</b> <b>What Risks Should We Be Talking About?*</b> Constance Neary, <i>Vice President for Risk Management, United Educators</i>	Marie Antoinette Ballroom, 2 <sup>nd</sup> floor
11:45 am – 1:00 pm	<b>Kick Off Lunch</b> Dr. Thayne McCulloh, <i>President, Gonzaga University</i>	Isabella Ballroom, 1 <sup>st</sup> floor
1:00 pm – 2:00 pm	<b>JOINT SESSION 4:</b> <b>Communicating in a Crisis: Are You Ready? *</b> Jill Eiland, <i>Managing Partner, Gallatin Public Affairs-Oregon</i> Michelle Cole, <i>Partner, Gallatin Public Affairs</i>	Marie Antoinette Ballroom, 2 <sup>nd</sup> floor
2:00 pm – 3:15 pm	<b>JOINT SESSION 5:</b> <b>The Most Important Tax Update of Your Career*</b> Dominic Daher, <i>Associate Vice President for Tax Compliance and Internal Audit, University of San Francisco</i> Gwen Spencer, <i>Tax Services Partner, PricewaterhouseCoopers</i>	Marie Antoinette Ballroom, 2 <sup>nd</sup> floor
3:15 pm – 3:30 pm	<b>Break</b>	
3:30 pm – 4:15 pm	<b>FINANCE SESSION 6: Roundtable (closed session)</b>	Marie Antoinette Ballroom, 2 <sup>nd</sup> floor
3:30 pm – 4:15 pm	<b>GENERAL COUNSEL SESSION 6: Roundtable (closed session)</b>	Flowerfield Room, 2 <sup>nd</sup> floor

*\*The Washington Society of CPAs will award continuing professional education credits for these qualifying classes.*

THURSDAY, APRIL 26, 2018 *CONTINUED*

TIME		LOCATION
4:45 pm	<b>Shuttle:</b> Historic Davenport Hotel to Gonzaga University	Lobby
5:00 pm – 6:00 pm	<b>Gonzaga University Campus Tour</b> Student Ambassador Guides	Gonzaga University 502 E Boone Ave Spokane, WA
6:00 pm – 9:00 pm	<b>Main Dinner Event</b> <i>Business Professional Attire</i> 6:00pm – Social 7:00pm – Dinner & Key Note: Rob Curley, <i>Editor, Spokesman Review</i>	John J. Hemmingson Center, Ballroom, 3 <sup>rd</sup> floor
9:00 pm – 9:45 pm	<b>Zag Shop</b>	Zag Shop 801 E Desmet Ave Spokane, WA
9:00 pm – 9:45 pm	<b>Shuttle Service:</b> Gonzaga University to Historic Davenport Hotel	
9:00 pm – 11:00 pm	<b>Hospitality Event</b>	Elizabethan Ballroom, 2 <sup>nd</sup> floor

FRIDAY, APRIL 27, 2018

TIME		LOCATION
6:00 am	<b>Guided Walk or Run:</b> <i>Discover Downtown!</i>	Lobby
7:00 am – 12:00 pm	<b>Shipping/Information Desk</b>	Isabella Ballroom, 1 <sup>st</sup> floor
7:00 am – 8:00 am	<b>Breakfast</b>	Isabella Ballroom, 1 <sup>st</sup> floor
8:00 am – 9:00 am	<b>JOINT SESSION 7:</b> <b>Generation Z – Lifestyle Survey: Recruiting, Engaging and Retaining an Anxious Generation*</b> Barry Telford, <i>CEO Universities West, Sodexo North America &amp; President, Sodexo Canada</i> Jonathan Preciado, <i>Senior Manager, Quality of Life Research, Global Offer Development, Sodexo</i>	Marie Antoinette Ballroom, 2 <sup>nd</sup> floor
9:00 am – 9:15 am	<b>Break</b>	
9:15 am – 10:15 am	<b>FINANCE SESSION 8:</b> <b>Active Management: It's Not Just About Net of Fee Excess Returns*</b> Ian Toner, <i>CFA Chief Investment Officer, Verus Investments</i>	Marie Antoinette Ballroom, 2 <sup>nd</sup> floor
9:15 am – 10:15 am	<b>GENERAL COUNSEL SESSION 8: Roundtable (closed session)</b>	Flowerfield Room, 2 <sup>nd</sup> floor
10:15 am – 11:15 am	<b>ELECTIVE SESSION 9a:</b> <b>Not-for-Profit Accounting Changes are Coming: Are you Ready?*</b> Melissa Harman, <i>CPA, National Practice Leader, Higher Education, Moss Adams</i> Tammy Erickson, <i>Partner, Moss Adams</i>	Marie Antoinette Ballroom, 2 <sup>nd</sup> floor
10:15 am – 11:15 am	<b>ELECTIVE SESSION 9b:</b> <b>Employee Benefit Plan Risks and Best Practices for Mitigation*</b> Michelle Ueding, <i>Partner, Kutak Rock</i>	Flowerfield Room, 2 <sup>nd</sup> floor
11:15 am – 11:30 am	<b>Break</b>	
11:30 am – 12:30 pm	<b>Lunch</b>	Isabella Ballroom, 1 <sup>st</sup> floor

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