



**5th Annual Conference**  
***Financial Orchestration of Global Education***  
**September 30 - October 1, 2019**

**Boise State University**  
1910 West University Drive  
Boise, Idaho 83725



**Conference Schedule**  
(Subject to Change)

**Session Tracks**

Study Abroad	<b>SA</b>
International Student Services	<b>ISS</b>
International Affairs	<b>IA</b>
Plenary	<b>P</b>

**Our 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.*

## Pre-Conference, Sunday, September 29, 2019

7:00 PM Meet and Greet - Location TBD

---

### Day 1 - Monday, September 30, 2019

**Spirit Wear** - Wear your school gear!

8:00 AM Registration Opens / Breakfast (luggage storage available)

8:45 AM Welcome & Introductions from the Center for Global Education at Boise State University



Ami Tain, Global Classroom Specialist and Passport Program Manager

9:00 AM

#### Opening Plenary Session

##### Boise State University VIP Panel Q&A

Local experts from the Center for Global Education at Boise State University 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.

Marsha Mallet, Moderator

##### Boise State University

Gonzalo Bruce, Assistant Provost

Corrine Henke, Director of International Student Services and Global Learning Opportunities

Ruth Prince, Director of Academic Immigration Services

Stephanie Marlow, Director of the Intensive English Program

Celeste Giordani, International Enrollment Counselor

Keith Quatraro, International Student Services Coordinator

P



10:30 AM

Break

11:00 AM

#### Presentation

##### Funding Structures of International Offices

Explore the pros and cons of different funding models through compare and contrast of four institutions and the various operations and initiatives that they support. How their funding structures have changed over time due to budget cuts, business needs, or institutional priorities and their associated challenges will all be explored.

Larry Phu, Director of Financial and Business Services, University of Texas at Austin

Drew Cahan, Director of Finance and Administration, Penn Global

Sandee Huang, Budget Officer, University of Kentucky International Center

Marie Cox, Assist Director, Budget & Finance for Educ Abroad and ISS, University of Colorado

Boulder

Ben Esp, Director, Budget and Personnel, Rutgers Global



12:00 PM

Lunch

## Day 1 - Monday, September 30, 2019 (continued)

### 1:00 PM Breakout Sessions

#### » Foreign Currency Hedging through a Financial Intermediary

In this session, you will gain a deeper understanding of how forward contracts work in foreign currency exchanges, be able to evaluate the pros and cons of forward contract use and better understand the budgeting and account benefits/challenges that forward contracts present. Join two institutional HEIBO members and a representative of Western Union present the complexities of hedging foreign currency.

Wil Biddle, Assoc Director for Administrative Services, University of Maryland  
Karen Wardzala, Assoc Director of Finance & Business, Office of Global Ed, Georgetown University  
Yassine Laghzaoui, Western Union Business Solutions



#### » Deal or No Deal?

##### Best Practices for Conducting Business with Education Abroad Providers

Education abroad providers (aka third-party providers) that design and implement customized study abroad programming offer a variety of services, including on-site staffing, logistical support, in-country expertise and risk management. This presentation will define the types of contracts and agreements used, outline best practices for selecting providers, soliciting bids, negotiating contracts and working with legal counsel.

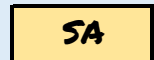
Miko McFarland, Executive Director of Education Abroad and Exchanges  
Santee Huang, Budget Officer  
University of Kentucky International Center



#### » Study Abroad Challenges: How Do You Deal With \_\_\_\_\_?

This roundtable discussion will share study abroad challenges that impact education abroad programs and how members have addressed them. Topics may include non-student program participants, fee collections, working with faculty, paying providers, cash advances, risk and safety, and a wealth of other possibilities!

Tim Hornsby, Moderator



### 2:00 PM

#### Panel Presentation

##### Don't Blame it All on the Millennials; the Multigenerational Workforce

Gone are the days that allow us to hire and retain employees that are happy to come into a cube and work from 8-4:30 each day. In order to attract new professionals, employers need to be more flexible and find value in each other's approach to their work. Our workforce is changing and expanding across five very different generations. What does that mean as we try to attract and retain employees while understanding the different styles and demands in our office? A panel with representatives from each generation will explain their perspectives.

Missy Peterson, Dir of Finance & Operations, Global Programs, University of Minnesota  
Guest Generation Representatives



### 3:00 PM Break

## Day 1 - Monday, September 30, 2019 (continued)

3:15 PM

### Breakout Sessions

» **Study Abroad Office Technology: Three Views on Procurement**

Aside from staff compensation packages, the greatest expenditure faced by international education offices frequently is the purchase of specialized software. International education managers need to be conversant in budgets, staffing, integration, implementation, training, user experiences, etc. Hear the approaches used by three institutions as they considered their strategic expenditures.

Larry Phu, Director, Financial and Business Services, Texas Global, UT-Austin  
 Jennifer Sommerville, Michigan State University  
 Christine Trinidad, Michigan State University  
 Danette Bontrager, Business Manager, Iowa State University  
 Kerry Geffert, Product Evangelist, Terra Dotta



» **Should I Go to NAFSA, or What Else?**

**The Role of Professional Development in Supporting Financial Employees**

As recent participants in the NAFSA Academy, our presenters will explain how to seek out professional development opportunities, how to advocate for funding and support, how to present the learning outcomes to leadership and leveraging professional development opportunities for employee retention.

Ami Tain, Global Classroom Specialist and Passport Program Manager, Boise State University  
 Sandee Huang, Budget Officer, University of Kentucky International Center



» **Signature Session: BEST PRACTICES**

**Exchange Programs**

Be on a team of problem solvers that will address challenges and seek resolutions related to study abroad exchange programs during this hands-on session. HEIBO's Exchanges Small Working Group will start laying the foundations for a draft of HEIBO's exchange program best practices from information gathered during this session.

Nate Lynch, Accountant II, GPS Alliance, University of Minnesota  
 Karen Wardzala, Assoc Director of Finance & Business, Office of Global Ed, Georgetown University  
 HEIBO Exchange Program Small Working Group



4:15 PM

**Hot Topics for Higher Ed International Finance Officers**

Start the discussion around the table with your fellow HEIBO members. Hot topics may include funding structures, China relations, finance staff structures, managing overseas campuses, fee setting, working with overseas or third party providers, and more. Vent!

Missy Peterson, Moderator



5:00 PM

**Daily Wrap-up**

5:15 PM

**Check into Hotel**

6:30 PM

**Dinner**

---

Day 2 - Tuesday, October 1, 2019

8:00 AM Registration/Breakfast

8:45 AM Welcome & Introductions from Boise State University

 Ami Tain, Global Classroom Specialist and Passport Program Manager

9:00 AM

**Keynote Address**

*HEIBO's keynote speaker will discuss current trends and issues in our field, bringing a unique academic lens to the business we all manage. A question and answer session will follow.*

Mark A. Buchanan, JD  
Chair, Management  
Professor, International Business, Business Law  
Boise State University

P



10:00 AM Break

10:30 AM

**Presentation and Discussion**

**Tired of Turnovers? HR Roadmap for Retention in International Offices**

*During this session, the presenters will share the challenges and practices from two BTAA schools around employee retention issues. A group discussion will follow that will help develop a platform on retaining employees more creatively and cost-efficiently in an international/global office.*

Ben Fan, Director, Budget and Personnel, Rutgers Global  
Tami Jauert, HR Director, Global Programs and Strategy Alliance, University of Minnesota



11:30 AM Lunch

12:30 PM

**HEIBO Member Survey Results and Hiring Panel Interactive Discussion**

*Review the results of our first HEIBO Membership Survey – the starting point for learning more about our members' paths to financial and business operations in international education at academic institutions. Then a panel of HEIBO members will share their experiences with the joys and sorrows of hiring and open the floor to hear your comments, experiences and entertain your questions. (The survey results will be made available to all HEIBO members.)*

Marsha Mallet, Director of Financial Analysis, College of Liberal and Professional Studies  
University of Pennsylvania

P



**Day 2 - Tuesday, October 1, 2019 (continued)**

**1:30 PM Breakout Sessions**

» **Hot Topics on International Student Services** 

Join this roundtable discussion on issues related to International Student Services. Topics may include student fees, orientation programs, international student recruitment, passway programs and more. Vent!

Ben Fan, Moderator 

★

» **The Role of Financial Decision-Making in Holistic Faculty-Led Program Design** 

Institutions often seek to strike a balance between robust and comprehensive programming, student accessibility and fiscal responsibility. This workshop will provide an opportunity to share a holistic approach to program design and discuss where finances play a role in decision-making and where they do not.

Amy Exah, Assistant Director for Faculty-Led Programs, University of Texas at Austin 

★


» **The Solo Performance:  
A Field Guide to Musicianship and International Finance** 

Are you a solo performer - a one-person financial show? It takes a special skill set to be able to manage a portfolio of activities on your own. Even if you work as a part of a team, become inspired to be an outstanding financial performer during this multi-media presentation.


Cathy Caine, International Programs Project Specialist, University of Minnesota Duluth  
Kenneth Munroe, Finance and Account Manager, Education Abroad, Temple University   


**2:30 PM Break**

**2:45 PM**

**Annual HEIBO Business Meeting** 

Agenda  
Adoption of Bylaws  
Nominations for Cohort (3) and At Large Representatives (2)  
Live Online Voting  
Standing Committees Gathering



**3:45 PM Wrap-up/Next Steps, Closing**

**4:00 PM Optional Walking Tour Boise State University**

International Office, Passport Office, and Campus

*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.*