

**MCCBOA
MARCH 2017 WORKSHOP
March 2-3, 2017**

Location: The James B. Henry Center
for Executive Development
Michigan State University
3535 Forest Road
Lansing, MI 48910-3831
Phone: (517) 353-4350
Phone: (800) 356-5705
msuhenrycenter@bus.msu.edu

Thursday, March 2, 2017

9:00-9:30 **Registration and Continental Breakfast**

9:30-9:45 **Welcome & Introductions**
Lillian Frick,
MCCBOA President

9:45-10:45 **Retirement Plan trends and Challenges in Higher Ed**
Tom Stephenitch, Regional VP
Kate Easley, Associate VP
TransAmerica

10:45-11:00 **Break**

11:00-12:00 **Making the Budget Fit**
Tom Ridout, David Torres
Forecast Analytics

Noon – 1:00 **Lunch**

1:15- 2:15 **Common Pitfalls and Risks of Capital Planning at Community Colleges**
Pat Podges, Sr. VP
Robert Stempien, Sr. VP
Plante Moran CRESA
Vicki Cook, VP, Finance and Administration,
Northwestern Michigan College

2:15-2:30 **Break**

2:30-3:15 **The Evolution of Retirement Plans in Higher Education – How Should Michigan Institutions React**
Chadd Hodkinson, Area VP
John Jurik, Area VP
Arthur J. Gallagher

3:15-3:30 **Break**

3:30-4:15 **Legislative Update**
Mike Hansen/Erin Schor
MCCA

4:30-6:00 **Attitude Adjustment**

6:00 **Dinner on your own or Group Dinner at Hop Cat**
(Shuttle available)

Friday, March 3, 2017

8:30-9:00 **Hot Breakfast**

9:00 – 9:45 **Institutional Investment Update**
Richard Annunziato
Director – Fixed Income Strategy
Kevin Mataway
Institutional Investments - Director

9:45-10:00 **Break**

10:00-10:45 **Telecom and Utility Expense Management**
Michael Harrington
Tenurgy

10:45-11:00 **Bull Session**
Moderator: Larry Gawthorp
- Survey Results
- Millage Updates
- NACUBO
- CCBO
- MCCBOA Website/Listserv
- Ideas for Best Practice
- Other

11:00-11:15 **Association Business**
- Approval of minutes
- Fall 2016
- Treasurer's Report
- Approval of MCO Tuition Adjustment

11:15 -12:00 **MEP Discussion**
Rick Scott, CPA
Chief Financial Officer
Kellogg Community College
Dori Drayton
Michael Krucker
Plante Moran

12:00 **Adjournment**



MCCBOA OFFICERS 2016-2017

President

Lillian Frick
Mid Michigan Community College

Vice President

Larry Gawthrop
Mott Community College

Treasurer

Michelle Kite
Southwestern Michigan College

Secretary

Susan Sather
Schoolcraft College

Past President

Todd Hurley
Grand Rapids Community College

Planning Meeting:

Lillian Frick, Larry Gawthrop, Todd Hurley,
Michelle Kite, Susan Sather

UPCOMING WORKSHOPS

Summer, 2017

Boyne Highlands Resort
<http://www.boyne.com/boynehighlands>
600 Highland Drive
Harbor Springs, MI 49740 Boyne Falls, MI
July 26-28, 2017

Fall, 2017

Soaring Eagle Resort
Mt. Pleasant
November 2-3, 2017

Spring, 2018

The James B. Henry Center for Executive
Development
Michigan State University
<http://www.bus.msu.edu/edc/>
East Lansing, MI
March 1-2, 2018

MCCBOA

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5.3 Institutional Investments

Arthur L. Gallagher

Forecast Analytics

Plante Moran

Tenurgy

TransAmerica

Michigan Community College Business Officers

Association



Spring Workshop
March 2-3, 2017

Meeting Location:

The James B. Henry Center for Executive
Development
Michigan State University
3535 Forest Road
Lansing, MI 48910-3831

Lodging at:

Candlewood Suites
3545 Forest Road
Lansing, MI 48910
(517) 351-8181

