



Wesley
Peachtree
Institute

VIRTUAL **WPI 2021 HBCU**FORUM

FINANCIAL STABILITY IN UNCERTAIN TIMES:
Emerging Opportunities for HBCU Boards and Administrative Leaders

AGENDA AT A GLANCE

A VIRTUAL **LIVE** EVENT | MARCH 8 - 9, 2021

VIRTUAL **WPI 2021 HBCUFORUM**

FINANCIAL STABILITY IN UNCERTAIN TIMES:
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CONFERENCE OVERVIEW

The 2021 HBCU Forum is set to be the most engaging event of the year for HBCU presidents, administrators, board members, staff, corporate partners, and friends!

**30+ Exciting Sessions and
Networking Opportunities**

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Distinguished Keynote Speakers

The 2021 HBCU Forum is this year's must-attend event for HBCU boards and administrative leaders. This year's forum will be conducted by the Wesley Peachtree Institute in an engaging, interactive virtual format. We're excited about the freedom of the virtual environment, where we can offer you the opportunity to hear from a variety of leading thinkers and intellectual champions in the sector who will address issues directly impacting your institution.

Right now, investment in minority-serving institutions is increasing as our institutions receive unprecedented attention. However, we know that this cannot magically erase decades of underfunding, marginalization, and deliberate attempts to scuttle our institutions and underserve our students.

Join the Wesley Peachtree Institute in creating strategic roadmaps to keep our institutions top-of-mind for exceptional students, talented faculty, successful alumni, corporate heads, and political leaders.

ABOUT **WPG** ■ ■ ■

The Wesley Peachtree Group, CPAs (WPG) was founded in 1989 in metro Atlanta by Donald K. Murphy, CPA, FCPA, CFE, CGFM, CGMA. From our earliest days, we customized services and support to match each client's unique circumstances. While no two businesses are alike, we serve each client with the same integrity, respect and care. We work hard to meet your reporting and filing deadlines. Additionally, we are here to help alleviate some of the business pressures you face. Our temporary staffing services and off-site processing services have helped organizations get through difficult times. We offer honest in depth assessments and actionable advice. As a result, we have become the go-to solution for a variety of business entities. Our roster of clients includes many types of organizations, such as minority-serving schools, colleges and universities, churches, nonprofit organizations, and private businesses.

ABOUT **WPI** ■ ■ ■

WPI aims to give back to the community in the form of education and training for individuals and institutions to help reverse the trend of institutions losing their accreditation due to financial unpreparedness. WPI believes that strengthening these institutions improves access to education for hundreds of thousands of Blacks and other races who want to learn.



FINANCIAL STABILITY IN UNCERTAIN TIMES:
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CONFERENCE OVERVIEW & AGENDA

Having a sound financial base is critical in demonstrating fiscal stability. Furthermore, the efficient management of institutional resources – both human and financial – helps to ensure that operations run smoothly, goals are attained, and the mission is advanced. Fiscal stability will allow HBCUs to not only live to see another day but live to see another century.

A sound financial base is demonstrated through enrollment and retention, giving, cost controls, and courageous leadership. The WPI HBCU Forum provides sessions focused on each of these tracks.

The conference structure consists of:

- 12 time blocks with two 50-minute sessions each (24 sessions total)
- 2 Keynote 50-minute sessions
- 4 Plenary Opening/Closing 50-minute sessions

CONTINUING PROFESSIONAL EDUCATION (CPE)

To obtain CPE credit for a given conference session, attendees must:

- Log into that session using the Swapcard conference platform,
- Attend the entire session, and
- Respond to all CPE polls or prompts announced by the session facilitator.

CPE certificates will be emailed to attendees within four weeks of the conference. Questions regarding CPE certificates may be emailed to hbcuforum@wpi-inc.org.

CONFERENCE TRACKS

Enrollment &
Retention

Fundraising &
New Opportunities

Cost Controls &
Fiscal Compliance

Courageous Leadership
& HBCU Distinctiveness



FINANCIAL STABILITY IN UNCERTAIN TIMES:
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MONDAY, MARCH 8, 2021

8:00 – 8:50 AM

Welcome: Mr. Don Murphy, Wesley Peachtree Group, CPAs

Opening Address: U.S. Congressman James E. Clyburn

Opening Plenary: HBCUs – Proud History and Dynamic Future

■ ■ ■ **Dr. Kassie Freeman (African Diaspora Consortium) and
Dr. M. Christopher Brown (Kentucky State University)**

▶ *Facilitator: Dr. Eurmon Hervey, Jr. [1 unit CPE: General]*

9:00 – 9:50 AM

The Board's Role in Financial Oversight

■ ■ ■ **Dr. Ronald Carter (Carter & Associates) and Ms. Shirley Hughes (Johnson C. Smith University)**

▶ *Facilitator: Dr. James Minor [1 unit CPE: Accounting/Auditing]*

Technology, Automation, and Operational Efficiencies

■ ■ ■ **Dr. Ward Ulmer (Walden University)**

▶ *Facilitator: Ms. Latoya Washington [1 unit CPE: Management]*

10:00 – 10:50 AM

HBCU Financial Instability and Turnaround Considerations

■ ■ ■ **Dr. James H. Ammons (Southern University at New Orleans)**

▶ *Facilitator: Ms. Brianne Nelson [1 unit CPE: Accounting/Auditing]*

The Social Justice Awakening and the Leadership Role of HBCUs

■ ■ ■ **Dr. Jelani Favors (Clayton State University)**

▶ *Facilitator: Mr. Jerry Hanes [1 unit CPE: General]*

11:00 – 11:50 AM

USDE Accreditation Changes and Implications for “Regional” Institutions

■ ■ ■ **Dr. Belle Wheelan (SACSCOC)**

▶ *Facilitator: Dr. James Minor [1 unit CPE: Accounting/Auditing/Government (Yellow Book)]*

A Goals-Driven Budget: When the CFO and Institutional Planning Offices Communicate Effectively

■ ■ ■ **Dr. Teresa Hardee (Southern University at New Orleans) and**

Ms. Ada Kwanbunbumpen (Southern University at New Orleans)

▶ *Facilitator: Ms. Yvonne Shanks [1 unit CPE: Accounting/Auditing/Government (Yellow Book)]*



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12:00 – 12:50 PM

Keynote: Re-Examining Economic Models: Considerations for HBCU Boards and Presidents

■ ■ ■ **Dr. Bridget Terry Long (Harvard Graduate School of Education)**

▶ *Facilitator: Dr. Eurmon Hervey, Jr. [1 unit CPE: Accounting/Auditing]*

1:00 – 1:50 PM

Accessing Custom Solutions to Address a New Business Cycle

■ ■ ■ **Ms. Constance Woods, Mr. Brad Fulton, Ms. Suzanne Lindquist, Mr. James Walker, Mr. Jesse Walton, Ms. Gail Covington, and Mr. Leon Henderson (Morgan Stanley)**

▶ *Facilitator: Mr. Jerry Hanes [1 unit CPE: Management]*

Innovation in Higher Education: Expanding Access to Quality Online Programs with Faculty at the Helm

■ ■ ■ **Mr. Philip Alphonse (The Vistria Group) and Ms. Tekoya Boykins (Academic Partnerships)**

▶ *Facilitator: Dr. Katara Williams [1 unit CPE: Specialized Knowledge]*

2:00 – 2:50 PM

Five Questions Every Board Member Should Ask

■ ■ ■ **Dr. James Minor (California State University)**

▶ *Facilitator: Ms. Anitra Lester [1 unit CPE: Management]*

HBCU Contributions to Community and Economic Development

■ ■ ■ **Mr. Rodrick Miller (Invest Puerto Rico and SAU Board of Trustees)**

▶ *Facilitator: Ms. Sonja Walker [1 unit CPE: Specialized Knowledge]*

3:00 – 3:50 PM

Enrollment, Retention, and Financial Stability Implications

■ ■ ■ **Dr. Melva Williams (Southern University Shreveport Louisiana/Higher Education Leadership Foundation)**

▶ *Facilitator: Ms. Yvonne Shanks [1 unit CPE: Management]*

Federal Financial Aid: The Major Financial Driver for Tuition-Driven Institutions

■ ■ ■ **Dr. Joel Harrell (U.S. Department of Education)**

▶ *Facilitator: Ms. Latoya Washington [1 unit CPE: Accounting/Auditing/Government (Yellow Book)]*

4:00 – 4:50 PM

Closing Plenary: Financial Stability in Uncertain Times

■ ■ ■ **Dr. Joseph H. Silver (Silver & Associates)**

▶ *Facilitator: Dr. Eurmon Hervey, Jr. [1 unit CPE: Management]*



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TUESDAY, MARCH 9, 2021

8:00 – 8:50 AM

Welcome: Mr. Don Murphy, Wesley Peachtree Group, CPAs

Opening Plenary: Fireside Chat – Changing the Trajectory of Sustainable and Responsible Wealth Management

■ ■ ■ **Mr. James Seth Thompson and Mr. Travis A. Allen (Bernstein)**

▶ *Facilitator: Dr. Eurmon Hervey, Jr. [1 unit CPE: General]*

9:00 – 9:50 AM

The Health and Safety Imperative in Decision Making

■ ■ ■ **Dr. Floyd Willis (Mayo Clinic)**

▶ *Facilitator: Mr. Milton V. Jones [1 unit CPE: Management]*

Philanthropy and Fundraising: Transformational Campaigns

■ ■ ■ **Dr. Juan McGruder (Oglethorpe University)**

▶ *Facilitator: Dr. Katara Williams [1 unit CPE: Specialized Knowledge]*

10:00 – 10:50 AM

Panel Discussion: Financial Considerations for Higher Education

■ ■ ■ **Mr. Ron Parker (National Association of Securities Professionals), Mr. George Nichols III (The American College of Financial Services), Mr. Marlōn Hall (Association of Wholesaling Diversity), Mr. Don Murphy (WPG), Mr. Jerry Hanes (WPG), and Mr. Durran Dunn (National Association of Black Accountants)**

▶ *Facilitator: Mr. Christian Nwasike [1 unit CPE: Management]*

Changing the Trajectory: Partnering with Bernstein

■ ■ ■ **Mr. Travis Allen, Mr. James Seth Thompson, and Ms. Margaret Borrasso (Bernstein)**

▶ *Facilitator: Ms. Sonja Walker [1 unit CPE: General]*

11:00 – 11:50 AM

Audit Considerations and Strategies for Post-Pandemic Viability

■ ■ ■ **Mr. Don Murphy and Mr. Keith Terrell (Wesley Peachtree Group)**

▶ *Facilitator: Mr. Jerry Hanes [1 unit CPE: Accounting/Auditing/Government (Yellow Book)]*

Tips for Advancement: Leadership Success During the COVID-19 Pandemic

■ ■ ■ **Ms. Carla Smith Willis (Washburn & McGoldrick and Member of The Registry)**

▶ *Facilitator: Ms. Yvonne Shanks [1 unit CPE: Specialized Knowledge]*



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12:00 – 12:50 PM

Keynote: Courageous Leadership Across the Higher-Education Landscape

■ ■ ■ **Dr. Ruth Simmons (Prairie View A&M University)**

▶ *Facilitator: Dr. Eurmon Hervey, Jr. [1 unit CPE: Management]*

1:00 – 1:50 PM

Legal Issues, Title IX Compliance, and Other “Hot Water” Matters

■ ■ ■ **Atty. Mike Freed (Gunter & Associates) and Mr. M. Kevin Woodall (MKW Investigations Company)**

▶ *Facilitator: Mr. Milton V. Jones [1 unit CPE: Accounting/Auditing/Government (Yellow Book)]*

2:00 – 2:50 PM

Student Success as a Fiscal Strategy

■ ■ ■ **Mr. Ed Willis (Gardner Institute)**

▶ *Facilitator: Ms. Brianne Nelson [1 unit CPE: Management]*

A “Clean” Independent Audit: Proactive Strategies for the Board and Presidents

■ ■ ■ **Mr. Don Murphy, Mr. Keith Terrell, and Mr. Jerry Hanes (Wesley Peachtree Group)**

▶ *Facilitator: Ms. Sonja Walker [1 unit CPE: Accounting/Auditing]*

3:00 – 3:50 PM

Black and Brown Population Growth and Re-Imagining HBCUs

■ ■ ■ **Dr. Daniel Velasco (Latinos for Education) and Dr. Adriel A. Hilton (Seton Hill University)**

▶ *Facilitator: Dr. Katara Williams [1 unit CPE: Management]*

Self-Care for High-Capacity Leaders

■ ■ ■ **Dr. Christopher Williams (Urology Consultants)**

▶ *Facilitator: Ms. Anitra Lester [1 unit CPE: Management]*

4:00 – 4:50 PM

Closing Plenary and “Door” Prizes

■ ■ ■ **Closing Plenary: Presidents Panel**

▶ *Facilitator: Dr. Melva Williams [1 unit CPE: General]*

