



Wesley
Peachtree
Institute

2024 VIRTUAL WPI
**HBCU & SMALL
COLLEGE FORUM**

METRICS MATTER

*Measuring and Monitoring Strategic Priorities
to Ensure Fiscal Strength and Growth*

MARCH 11-12



The Virtual 2024 WPI HBCU & Small College Forum is set to be the event of the year for college presidents, administrators, board members, staff, corporate partners and colleagues!

20+ Exciting Sessions and Networking Opportunities Distinguished Keynote Speakers

The 2024 HBCU & Small College Forum is conducted by the Wesley Peachtree Institute (WPI) to bring together staff, leaders, trustees and consultants of HBCUs and small- to mid-size colleges. This year's focus on the theme of "Fiscal Strength and Future Growth: Advancement and Investment Considerations for HBCUs and Small Colleges" will again be brought to you in an engaging, interactive virtual format.

The Forum features 20+ sessions delivered by thought leaders and intellectual champions who will address critical issues impacting today's higher education institutions.

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

The Wesley Peachtree Institute (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 will improve access to higher education for generations to come.



Greetings:

Welcome to the 12th Annual HBCU and Small College Forum! It is an honor to once again host this critical dialogue about the advancement and investment considerations for HBCUs and small colleges for fiscal strength and future growth.

As the CEO and Managing Associate of The Wesley Peachtree Group, CPAs, I am dedicated to working on the front lines to ensure that America's HBCUs and small colleges are informed and tackling the disruptions of technological, environmental, fiscal and political risks and threats. These factors pose as barriers to the growth and overall sustainability of these great institutions, which are designed to provide under resourced and underrepresented communities in our country with a transformative and innovative education.

I am confident that previous attendees of our HBCU Forum will find this year's conference equally or more robust. And for those joining us for the first time, I am sure you will gain the knowledge to join the conversation on how to preserve the legacy and ensure the future of our HBCUs.

Sincerest thanks and appreciation to our corporate sponsors, forum speakers, presenters and members of the planning team who worked to make this year's HBCU and Small College Forum a success!

Very truly yours,

A handwritten signature in blue ink, appearing to read 'Donald K. Murphy', is written over a faint blue line.

Donald K. Murphy, CPA, FCPA, CFE, CGFM, CGMA
CEO and Managing Associate
The Wesley Peachtree Group, CPAs



The Wesley Peachtree Group
Certified Public Accountants and Business Strategists

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Greetings,

It is an honor to welcome each of you to the Virtual WPI 2024 HBCU and Small College Forum. The HBCU and Small College Forum is a unique collaboration of stakeholders in higher education who want to focus on the critical issues facing these institutions across the country.

With the ever-changing technological, economic and socio-political landscape, it is critically important that the future of HBCUs and small colleges remains a bright one. Through our collective work, we not only need them to survive, but thrive!

Thank you for participating and supporting the forum this year. We trust that you will gain insights and strategies that might help you to advance your respective campus missions.

Very truly yours,

Eurmon Hervey

Eurmon Hervey
Chair of WPI Advisory Board



CONFERENCE OVERVIEW

Having a sound financial base is critical to demonstrating fiscal stability. Furthermore, efficient management of institutional resources – both human and financial – helps ensure that operations run smoothly, goals are attained and the mission is advanced. Fiscal stability will allow HBCUs and small colleges to endure and grow.

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 areas.

The conference structure consists of:

- 8 time blocks with two 50-minute sessions each (16 sessions total)
- 2 Keynote 40-minute sessions
- 4 Plenary Opening/Closing 40-minute sessions
- 2 Virtual Lunch & Networking sessions

CONTINUING PROFESSIONAL EDUCATION (CPE)

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

- Log into that session using the HBCU Forum conference platform, powered by Accelevents.
- Attend the entire session.
- 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

Financial Strength
& Governance

Student Success &
Institutional Planning

Courageous
Leadership

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METRICS MATTER

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MONDAY | MARCH

11

MONDAY, MARCH 11

8:45 – 9:50 AM

Welcome: Mr. Don Murphy

Opening Plenary: “Student Ready” Colleges: A Look at Effective Institutions

••• Dr. Belle S. Wheelan (SACSCOC)

Facilitator: Dr. Eurmon Hervey, Jr. [1 unit CPE: Business Management & Organization – Non-Technical]

“Students Are Central to Success” is a phrase Dr. Belle Wheelan coined when asked about the acronym, SACS. It is common for colleges and universities to expect students to be ‘college-ready.’ However, it is less common for colleges and universities to ask themselves whether they are ‘student-ready.’ How do institutions measure whether they are effective at serving students? For nearly two decades, Dr. Belle S. Wheelan, a nationally renowned higher education leader, has been encouraging campus leaders to ‘believe their own data’ and take ‘courageous’ action in a timely manner. In this session, Dr. Wheelan reflects on the vicissitudes of the larger higher education accreditation work and offers ‘rules for the road’ for small colleges, and particularly HBCUs.

10:00 – 10:50 AM

How Boards Lead Small Colleges & Measure Success

••• Dr. Alice Lee Williams Brown (Appalachian College Association)

Facilitator: Dr. Thomas Bullock [1 unit CPE: Business Management & Organization – Non-Technical]

Boards of Trustees have tripartite functions. They are ultimately responsible for the selection of the CEO, policy-making, and fiscal oversight. This session focuses on how successful trusteeships can help small private colleges survive in uncertain economic times. The speaker, Dr. Alice Lee Williams-Brown, is the author of “Cautionary Tales: Strategy Lessons from Struggling Colleges” and “How Boards Lead Small Colleges.”

Metrics for Academic Student Success

••• Mr. Ed Willis (Prairie View A&M University) and Dr. Zackeus Johnson (Southern University)

Facilitator: Ms. Bernette Taylor [1 unit CPE: Business Management & Organization – Non-Technical]

“To college” and “through college” are two different concepts that require different strategies for institutions focused on retention. Except for graduation, a mass exodus of students should not be desired. However, for some institutions, upwards of 40% of students fail to return. When framed as 40% of the previous year’s revenue, the fiscal implications become clearer. This session frames retention as a fiscal strategy and offers insights on improving retention from two leaders in the throes of the work.

11:00 – 11:50 AM

General Retirement Plan Considerations and the Role of a Plan Fiduciary

••• Ms. Constance L. Woods (Morgan Stanley)

Facilitator: Mr. Jerry Hanes [1 unit CPE: Finance – Technical]

Get familiar with your role as a Plan Fiduciary, laws that govern fiduciary responsibilities, and the choices you can make to manage those responsibilities while protecting yourself and your institution.

Data Science and Institutional Transformation

••• Dr. Dwaun Warmack and Dr. Teresa Hardee (Claflin University)

Facilitator: Dr. Thomas Bullock [1 unit CPE: Information Technology – Technical]

Data Science reflects a synthesis of the disciplines of computer science, business, statistics, and the emerging artificial intelligence domain. Increasingly, colleges and universities are embracing data science and integrating it into decision-making and strategic planning. This session provides insights into operational improvements that can be made via technology and automation to promote institutional transformation.

MONDAY, MARCH 11

12:00 – 12:55 PM

Leadership and the Quest for the #1 Student Experience

●●● **Retired Lt. Gen. Darrell K. Williams (Hampton University)**

Facilitator: Dr. Eurmon Hervey, Jr. [1 unit CPE: Personal Development – Non-Technical]

Delivering the ‘#1 Student Experience’ is the priority for the new Hampton University president, Retired Lt. General Darrell K. Williams. This effort has required an amalgamation of organizational structure and systems; academic programs and processes; social services and support; and a university culture and ethos that inspires students to excel. In all these areas, investments are strategically made. This session sheds light on the student experience and how that one effort changes everything.

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1:00 – 1:15 PM

Commercial Break from our Sponsors

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2:00 – 2:50 PM

Operational Effectiveness: Understanding Culture, Policies, People, Resources

●●● **Mr. Don Murphy and Mr. Jerry Hanes (Wesley Peachtree Group, CPAs)**

Facilitator: Ms. Bernette Taylor [1 unit CPE: Management Services – Technical]

Are the right people with the right skills in the right roles? Are policies and procedures known and/or followed? For incoming CEOs and CFOs, a clear understanding of the institutional challenges and opportunities are critical in decision-making. WPG takes a ‘deep dive’ into business and academic operations through the lenses of culture, policies & procedures, technology, and people to help institutions identify their ‘pain points’ and growth areas. This session offers insights and strategies based on WPG’s decades of experience, which has helped shape strategic plans and saved institutions millions of dollars.

Creating Effective Partnerships: Helping Donors to Accomplish Shared Goals

●●● **Dr. Juan McGruder (Meharry Medical College)**

Facilitator: Dr. Katara William [1 unit CPE: Business Management & Organization – Non-Technical]

Partnerships matter when raising money for institutions. The social and political climate in America has ignited a renewed focus on higher education to develop agents of change. Presidents and their advancement offices have a window of opportunity to share their stories of resilience in ways that compel donor support. This session, led by Dr. Juan A. McGruder, a seasoned advancement professional, focuses on strategies that may increase philanthropic support and promote the advancement of institutional priorities.

MONDAY, MARCH 11

3:00 – 3:50 PM

Metrics Matter: Capacity Building Today for a Better Tomorrow

••• **Dr. Vladimir Appeaning (Southern University)**

Facilitator: Ms. Bernette Taylor [1 unit CPE: Business Management & Organization – Non-Technical]

What a difference a year can make! When a Vice Chancellor for Academic Compliance & Institutional Accreditation Liaison takes the helm of another institution for a year, you know that metrics will be front-and-center. In this session, Dr. Vladimir Appeaning will share his unique perspective and insights on the importance of institutional research, planning, and effectiveness. And how, when given intense focus, things can ‘turn around.’

Top Ten School Audit Findings (Financial Aid/Institutional Findings)

••• **Ms. Shelia Brown and Ms. Sonja Walker (Wesley Peachtree Group, CPAs)**

Facilitator: Dr. Thomas Bullock [1 unit CPE: Auditing (Governmental) – Technical]

A clean audit is the ultimate goal for university administrators each year. Even so, identifying weaknesses can help alleviate practices that can lead to poor audit results. Each year, the Department of Education (ED) publishes a list of the top 10 compliance audit findings as they relate to the administration of Title IV programs. Attendees will be able to align their strategic priorities as we discuss the top 10 audit findings.

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4:00 – 4:50 PM

Closing Plenary: Mission Possible – Accepting the Assignment to Ensure Future Growth

••• **Dr. Joseph H. Silver, Sr. (Silver & Associates)**

Facilitator: Dr. Katara Williams [1 unit CPE: Business Management & Organization – Non-Technical]

Leading a college or university could seem like a ‘mission impossible’ for many aspiring presidents. Further, advancing the actual mission of an institution, which has student success at its core, can seem daunting as it has implications for all those employed from the cafeteria worker to the Board of Trustees. Ensuring long term growth requires an institutional commitment and involves so many functions and so many people. Dr. Joseph H. Silver, Sr. is a highly sought-after higher education consultant and trainer. Having served at all levels of higher education from faculty member all the way to leadership at the president, board, and university system levels, he shares his insights on how to make the seemingly impossible – possible.

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TUESDAY | MARCH

12

TUESDAY, MARCH 12

8:45 – 9:50 AM

Opening Plenary: Financial Strength – Considering Today’s Investments and Tomorrow’s Returns

••• **Mr. James Seth Thompson (Bernstein) and Dr. Juan McGruder (Meharry Medical College)**

Facilitator: Dr. Eurmon Hervey, Jr. [1 unit CPE: Finance – Technical]

About 25 HBCUs were recipients of unrestricted and unsolicited gifts from MacKenzie Scott in the last three years – totaling over \$560 million. And there have been recent sizeable ‘investments’ to minority serving institutions and organizations to ensure that operations focused on social mobility continue. For institutions receiving windfalls and for those who have not felt a financial ‘windfall’ in years, there are still investment strategies to consider to improve financial strength. An expert in wealth management shares insights on how institutions might think strategically today about all investments to ensure a return on those investments.

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10:00 – 10:50 AM

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

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

Facilitator: Ms. Bernette Taylor [1 unit CPE: Auditing (Governmental) – Technical]

The end of the fiscal year is a milestone and brings with it mandatory independent audits. This session provides lessons learned from over 30 years of auditing HBCUs and helping them to ‘finish strong.’ Cost controls and proactive strategies for a successful audit will be shared with board members, presidents, and CFOs in mind.

Creating ‘Joy’ in the Classroom: Empowering Collegiate Communities to Thrive Academically

••• **Dr. Christopher Jett (Georgia State University) and Dr. Michelle Frierson (Utah State University)**

Facilitator: Dr. Eurmon Hervey [1 unit CPE: Business Management & Organization – Non-Technical]

It is said that “No one rises to low expectations.” Thus, the perceptions of academic ability – whether positive or negative – can shape student outcomes. Given the comparative lower number of minorities who major in the hard sciences, how might teachers of minority students engage, equip, and empower? In this session, two scholars, who have published widely on the subject, come together to share insights on this question.

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11:00 – 11:50 AM

Micro-College Metrics: Small on Purpose and for a Purpose

••• **Atty. Suzanne Walsh (Bennett College)**

Facilitator: Dr. Eurmon Hervey [1 unit CPE: Business Management & Organization – Non-Technical]

According to the USDE, a “small college” has less than 5,000 students. In order to remain viable, Micro-Colleges (those with less than 1,000 students) must carve out their own special place in the higher education landscape, one where ‘smallness is our strength.’ What does it mean to measure growth quantitatively versus qualitatively? In this session, President Suzanne E. Walsh of Bennett College, shares her strategy for embracing a small-but-solid approach and how that is making the institution stronger.

Metrics to Ensure Fiscal Strength

••• **Mr. Gerald Hector (University of Central Florida)**

Facilitator: Ms. Bernette Taylor [1 unit CPE: Accounting (Governmental) – Technical]

Ideally, an institution’s budget is ‘goals driven.’ This means that funds designated for institutional priorities should actually be spent on the institutional priorities. When institutions are in financial peril, cost containment, retrenchment, and enterprise resource planning require strategic and decisive action to ‘stop the bleeding.’ This session highlights and explores specific strategies used to stabilize and then position the institution to effectively accomplish its mission with its current resources.

TUESDAY, MARCH 12

12:00 – 12:55 PM

Creating S.T.E.A.M. for the Future Workforce

••• **Mr. Victor Reinoso (Amazon)**

Facilitator: Dr. Eurmon Hervey, Jr. [1 unit CPE: Business Management & Organization – Non-Technical]

Many 21st Century ‘disruptor’ corporations, such as Amazon, need computer scientists, engineers, and individuals who are trained to think creatively about technology and the billions of people that use it. How might HBCUs and small colleges play a bigger role in the production of skilled personnel for the future workforce? Victor Reinoso, who leads Amazon’s education efforts across the globe, offers insights on how HBCUs and small colleges that focus on STEAM (Science, Technology, Engineering, Arts, and Mathematics) can make a huge difference in workforce preparation.

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1:00 – 1:15 PM

Commercial Break from our Sponsors

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2:00 – 2:50 PM

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

••• **Mr. Joel Harrell and Dr. Kerri Moseley-Hobbs (US Department of Education)**

Facilitator: Ms. Bernette Taylor [1 unit CPE: Auditing (Governmental) – Technical]

For many HBCUs, 90% or more of the student population are Pell-Eligible and/or receive some form of financial aid. This, undoubtedly, means that oftentimes, the main revenue source for HBCUs is the federal government. This session provides updates on federal regulations and insights on demonstrating compliance, factors critical to ensuring institutions maintain accreditation.

Metrics for Institutional Transformation and Donor Support

••• **Dr. Katara Williams (Southern University) and Mrs. Roberta Pinckney (Barber-Scotia College)**

Facilitator: Dr. Thomas Bullock [1 unit CPE: Business Management & Organization – Non-Technical]

Barber-Scotia College is resilient! This session highlights the strategic actions taken by this small HBCU. It further highlights the capstone research work of doctoral students at another large HBCU to inspire institutional transformation and improve donor support. An institutional advancement professional and the board chair discuss real ‘theory-to-practice’ scenarios developed by aspiring college leaders.

TUESDAY, MARCH 12

3:00 – 3:50 PM

Managing the Business of Higher Education

••• **Dr. Hanna Rodriguez-Farrar (Rensselaer Polytechnic University)**

Facilitator: Dr. Eurmon Hervey [1 unit CPE: Business Management & Organization – Non-Technical]

The demographic trends suggest that the number of traditional students is declining. However, the number of people who need to learn new skills and/or learn new ways of doing ‘old’ things increases steadily as technology advances. How might colleges change their business model and ‘lens’ to focus on learners versus traditional students? This session is led by a business strategist turned college administrator, who will offer insights on how higher education, as an industry, might consider doing business in the future.

Roundtable Discussions:

Group #1 – Board Members

Group #2 – Presidents & CEOs

Group #3 – CFOs

Group #4 – Academic Affairs

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4:00 – 4:50 PM

Closing Plenary & Door Prize Drawing

Keynote: ‘Manna’ From Heaven: Understanding Unsolicited & Unrestricted Gifts to Minority Serving Institutions

••• **Dr. Marybeth Gasman (Rutgers University)**

Facilitator: Dr. Katara Williams and Dr. Thomas Bullock [1 unit CPE: Business Management & Organization – Non-Technical]

In recent years, unprecedented gifts have been made to small colleges and HBCUs, in particular. And to add more intrigue, these gifts have largely been unsolicited and unrestricted! How might institutions, who have not received, position themselves? And are there accountability measures and/or expectations for those who have received? Participants will engage with Dr. Marybeth Gasman, an author and historian, who will share insights to chart a course for the future work of MSIs with regard to monitoring the metrics that matter.

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FORUM SPEAKERS

MARCH 11-12



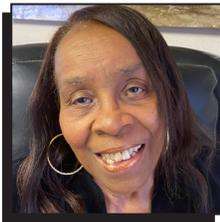
Dr. Vladimir Appeaning

Vice President for Strategic Planning, Policy and Institutional Effectiveness
Southern University and A&M College System



Dr. Alice Lee Williams Brown

President Emerita
Appalachian College Association



Shelia Brown

Vice President & Senior Associate
The Wesley Peachtree Group, CPAs



Dr. Thomas Bullock

Senior Consultant
Genesis Ed Solutions



Dr. Michelle Frierson

Assistant Professor, Mathematics Education
Utah State University



Dr. Marybeth Gasman

Distinguished Professor, Associate Dean
Rutgers University

MARCH 11-12



Jerry Hanes

Associate Vice President and Senior Associate
The Wesley Peachtree Group, CPAs



Dr. Teresa Hardee

Executive Vice President & Chief Operating Officer
Claflin University



Dr. Joel Harrell

Program Director
Federal Student Aid
Partner Participation and Oversight Program Outreach Communications
U.S. Department of Education



Mr. Gerald Hector

Senior Vice President for Administration and Finance
University of Central Florida



Dr. Eurmon Hervey, Jr.

Executive Director
The Wesley Peachtree Institute



Dr. Christopher Jett

Associate Professor of Mathematics Education
Georgia State University

MARCH 11-12



Dr. Zackeus Johnson
Vice Chancellor for Student Affairs,
Enrollment Management and Student Success
Southern University at New Orleans



Dr. Juan McGruder
Senior Vice President for Institutional Advancement
Meharry Medical College



Dr. Kerri Moseley-Hobbs
Director, Policy Implementation & Liaison Group
U.S. Department of Education



Donald Murphy
CEO & Managing Associate
The Wesley Peachtree Group, CPAs



Mrs. Roberta Pinckney
Retired CEO & Chairwoman
Barber-Scotia College



Mr. Victor Reinoso
Global Director, Education
Amazon

MARCH 11-12



Dr. Hanna Rodriguez-Farrar

Co-Head of the Office of Community Engagement and Communication
Rensselaer Polytechnic University



Dr. Joseph H. Silver

President, Silver & Associates



T. Bernette Taylor

Director
Southern University at New Orleans



Keith X. Terrell

Vice President, COO, and Senior Associate
The Wesley Peachtree Group, CPAs



Mr. James Seth Thompson

Senior Vice President
Bernstein Private Wealth Management



Sonja M. Walker

Student Financial Aid Associate
The Wesley Peachtree Group, CPAs

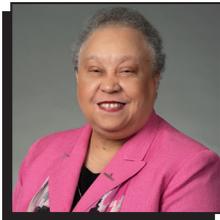
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Suzanne Walsh JD
President
Bennett College



Dr. Dwaun Warmack
President
Claflin University



Dr. Belle S. Wheelan
President
Southern Association of Colleges and Schools Commission on Colleges



Lt. Gen (Ret) Darrell K. Williams
President
Hampton University



Dr. Katara Williams
Vice Chancellor
Southern University Agricultural Research and Extension Center



Edward M. Willis
Vice President of Student Affairs
Prairie View A&M University



Constance L. Woods
First Vice President
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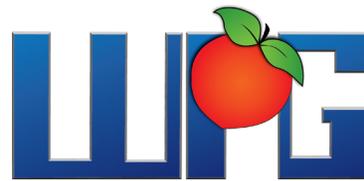
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