

**MASSACHUSETTS STATE UNIVERSITIES
& COMMUNITY COLLEGES
CHIEF FINANCIAL OFFICERS & COMPTROLLERS**

JOINT MEETING AGENDA

**June 15-17, 2022
Cape Cod Community College**

Conference Registration Link: <https://www.necc.mass.edu/cfo-conference>

WEDNESDAY, JUNE 15th

**BLUE WATER RESORT – Flying Bridge Room
291 SOUTH SHORE DRIVE, SOUTH YARMOUTH, MA**

11:30 – 1:00 pm	Lunch Check In	Surfside Grille Pavilion Please see Allie or Kathleen to Check In
1:00 – 1:15 pm	Welcome	Association Leadership <i>Nate MacKinnon, MACC</i> <i>Vincent Pedone, State U Group</i>
1:15-1:45 pm	Presentation: <i>Presenter:</i>	Understanding How Financing Can Help Budgeting for Capital Projects <i>Kelly Furgal, AVP, Relationship Manager, First American</i>
1:45– 2:30 pm	Presentation: <i>Presenter:</i>	Leading by Example-Sustainability <i>Eric Friedman-Mass Dept of Energy Resources</i>
2:30 – 2:45 pm	Break	Refreshments will be served
2:45-3:30 pm	Presentation <i>Presenter</i>	Division of Capital Asset Management and Maintenance <i>Sarah Felton, Senior Project Manager</i>
3:30-4:15 pm	Presentation: <i>Presenter:</i>	Future of Work in the Commonwealth <i>Joan Matsumoto, Special Director of Transformation, Executive Office for Administration and Finance</i>
4:15 – 4:30 pm	Break/Hotel Check-In	
4:30 – 5:30 pm	Reception	Surfside Grille Pavilion; sponsored by Eaton Vance Investment Counsel
5:30 -8:30 pm	Dinner	Surfside Grille Pavilion; sponsored by First American

THURSDAY, JUNE 16th

**CAPE COD COMMUNITY COLLEGE HYANNIS CENTER
540 MAIN STREET, HYANNIS, MA**

7:15 - 8:15 am	Breakfast Check In	CCCC, Hyannis Center; sponsored by John Meyers Please see Allie or Kathleen to Check In
8:15 – 9:00 am	Presentation: <i>Presenters:</i>	PACE Update <i>Frank Nocella, VP A&F Middlesex Community College Doug Shropshire, VP Finance and CFO, Bridgewater State University Roy Matthew, Partner, Deloitte Lauren Rochholz, Manager, Deloitte</i>
9:00 – 9:30 am	Presentation: <i>Presenters:</i>	State Comptroller’s Office Update <i>William McNamara, Comptroller</i>
9:30 -10:15 am	Presentation: <i>Presenter:</i>	Investment Market Update <i>Matthew Morse, Chief Investment Officer-Eaton Vance Investment Counsel.</i>
10:15 – 10:30	Break	Refreshments will be served
10:30- 11:15 am	Update: <i>Presenters:</i>	Massachusetts Department of Higher Education – Budget; Formula Funding; DHE Strategic Priorities; Equity Agenda; Financial Aid Funding and Redesign <i>Joe Wallerstein</i>
11:15 – 12:00 pm	Update: <i>Presenter:</i>	Regional Workforce Needs, Massachusetts Executive Office of Education <i>Bob LePage, Assistant Secretary for Career</i>
12:00 – 1:30 pm	Lunch	Colombo’s Café; sponsored by EMSIBG
1:30– 2:15 pm	Presentation: <i>Presenter:</i>	EMSIBG Economic Modeling- Economic Impact Study, Career Coach, Alumni Outcomes, Program Alignment, Go Recruit <i>Mike Hall</i>
2:15-3:15 pm	Update:	O’Connor & Drew and MSCBA for GASB 87 <i>Steve Cohen, Audit Principal Jennifer Gonzalez, Deputy Director Molly Bench, Comptroller</i>
3:00-3:15 pm	Break	Refreshments will be served
3:15 – 4:00 pm	Presentation: <i>Presenter:</i>	ECSI sponsor <i>Karen Sammons, Regional Sales Manager</i>

COMMUNITY COLLEGES & STATE UNIVERSITIES RECEPTION AND DINNER

6:00 – 7:00 pm	Reception	Networking Reception sponsored NelNet
7:00-8:30 pm	Dinner	Surfside Grille Pavilion sponsored by ECSI
8:30-10:00 pm	Reception	Surfside Grille Pavilion sponsored by Ferrilli

FRIDAY, JUNE 17th

**CAPE COD COMMUNITY COLLEGE HYANNIS CENTER
540 MAIN STREET, HYANNIS, MA**

7:15 – 8:00 am	Breakfast Check In	CCCC, Hyannis Center Please see Allie or Kathleen to Check In
8:00 – 8:15 am	Welcome	Stephen Marini / Bob Perry
8:15-9:45 am	Presentation: <i>Presenters:</i>	Technology/Security Update <i>Robert Ferrilli, President, Ferrilli</i>
9:45-10:00 am	Break	Refreshments will be served
10:00 – 11:30 am	Update:	CFO Round Table Priorities, Team Update Joint Strategic Initiatives and Future Opportunities
11:30 – 12:00 pm	Meeting	Business Meetings for Respective CFOs and Comptrollers

HOTEL INFORMATION & PARTNER ORGANIZATIONS

Blue Water Resort

291 South Shore Drive
South Yarmouth, MA 02664
800-367-9393 | 505-398-2288

<https://redjacketresorts.com/blue-water-resort/driving-directions-blue-water-resort>

Hyannis Center

Cape Cod Community College
540 Main Street, Hyannis, MA
508-375-5000

<https://www.google.com/maps/dir/540+Main+St.+Hyannis,+MA+02601>

Please indicate your starting point for exact directions.



**MASSACHUSETTS
Department of
Higher Education**



**COMPTROLLER OF THE COMMONWEALTH
OF MASSACHUSETTS**

Massachusetts State Universities

JOINT MEETING SPONSORS – THANK YOU!

