

TACUBO Fall Conference 2026

Advance Notice and CPE Information

September 20-22, 2026 | Omni Las Colinas, Las Colinas, Texas

Sponsor: TACUBO | Texas State Board of Public Accounting Sponsor ID 009523

Delivery Method: Group Live

Program Level: Overview to Intermediate for all sessions and forums

Prerequisites and Advance Preparation: None for all sessions and forums

CPE Credit Measurement: One CPE credit equals 50 minutes of continuous participation; one-fifth of credit increments are used after the first credit is earned.

Maximum Attendee CPE: Up to 12.9 CPE credits based on the non-overlapping attendance path reflected in the agenda

Note: Sessions and forums listed below are CPE-eligible. Classification uses the Texas State Board of Public Accountancy field-of-study categories.

Session 1 - New to Higher Education or Texas Higher Education

Date/Time: Monday, September 21, 2026, 7:30-8:30 a.m. | **Location:** Omni Las Colinas, Las Colinas, Texas |

Field of Study: Business Management and Organization | **Classification:** Non-Technical | **CPE Credit:** 1.2 |

Instructor/Presenter: Bob Brown

Program description: Are you relatively new to higher education? Bob Brown will welcome attendees and provide an overview of what to expect, including the challenges and rewards of a career in higher education. Bob has been a higher education CFO for more than 40 years and has served institutions ranging from community colleges to flagship research universities.

Learning Objectives:

- Identify core differences, expectations, and operating considerations within higher education and Texas higher education.
- Recognize leadership and career practices that support effective service in higher education business and finance roles.

Instructor/Presenter Bio:

Bob has been a Higher Education CFO for over 40 years. He has served varied institutions, including a Flagship, multiple Research Universities, Community Colleges, Community College Systems, and a University System. He is a Certified Public Accountant, and a proud Alumnus of the University North Texas. His many honors include the Distinguished Service Award from the National Association of College and University Business Officers.

Session 2 - Leadership with Purpose: Inspiring Growth, Impact, and Change

Date/Time: Monday, September 21, 2026, 9:15-10:15 a.m. | **Location:** Omni Las Colinas, Las Colinas, Texas |

Field of Study: Business Management and Organization | **Classification:** Non-Technical | **CPE Credit:** 1.2 |

Instructor/Presenter: Gerald L. Hector, CPA

Program description: In today's environment of constant change, the most effective leaders are not those with all the answers—they are those willing to lead with authenticity, humility, and purpose. Author Gerald Hector, will share lessons from his leadership journey, offering practical insights on building trust, embracing vulnerability, navigating uncertainty, and inspiring teams to achieve meaningful impact, from his

current and past leadership roles as CFO at institutions such as Morehouse School of Medicine and University of Central Florida, and VP for Finance and Treasurer at Cornell University. Attendees will leave challenged to rethink leadership and equipped to lead with greater confidence and intention.

Learning Objectives:

- Identify leadership behaviors that build trust, authenticity, and purpose during periods of change.
- Apply practical approaches for leading teams with confidence, humility, and intention.

Instructor/Presenter Bio:

Gerald L. Hector, CPA, is executive vice president and chief financial officer of Morehouse School of Medicine in Atlanta. Hector also held similar positions in higher education at Cornell University, Ithaca College, Morehouse College, Johnson C. Smith University, and Central Florida in Orlando, FL. His experiences span all aspects of higher education management that include treasurer, debt management, controller's office, information technology, post award management, policy office, student accounts/bursar, facilities, grounds, business operations, auxiliary services, risk management, purchasing and procurement, legal, financial aid, campus safety, compliance, and public private partnerships.

With more than a quarter of a century serving in higher education, and higher education support organizations, he is known as a results oriented strategic thinker and is lauded for his collaborative and focused leadership style that garners trust and builds confidence in his divisions and units to deliver on the mission of the institutions he serves. He believes in growing and investing in all those who work with him for the benefit of the institutions he serves.

He is a sought-after speaker on matters of higher education finances and is author of *It's Easy Son, Quit Making Things Difficult*, his memoir. He is a graduate of Howard University in Washington DC where he majored in Accounting. He is known for his quick wit, and constant reminder to everyone working with him that, "we can't fix what we won't face." A reminder that applies to finances, operations, and culture.

Session 3 - Confidence in Difficult Conversations: SOS Tools for Success

Date/Time: Monday, September 21, 2026, 10:30 a.m.-Noon | **Location:** Omni Las Colinas, Las Colinas, Texas | **Field of Study:** Communications | **Classification:** Non-Technical | **CPE Credit:** 1.8 |

Instructor/Presenter: Dr. Norma Guerra, Emeritus Professor of UTSA

Program description: Dr. Norma Guerra provides practical strategies to navigate challenging conversations with confidence and clarity. This session highlights pulse checks, effective preparation, and in-the-moment management techniques that support collaborative solutions.

Learning Objectives:

- Identify communication strategies that support effective preparation for difficult conversations.
- Apply in-the-moment management techniques that help move challenging conversations toward collaborative solutions.

Instructor/Presenter Bio:

Dr. Norma Guerra is a school psychologist, mediator, and licensed professional counselor. As an emeritus professor of UTSA, she has researched and taught the key roles of social cognitive development in problem-solving. She now consults with leaders to develop strategic plans that include success and professional and interpersonal levels.

Session 4 - Mental Health Resilience in a Changing Environment

Date/Time: Monday, September 21, 2026, 1:00-2:30 p.m. | **Location:** Omni Las Colinas, Las Colinas, Texas |

Field of Study: Behavioral Science | **Classification:** Non-Technical | **CPE Credit:** 1.8 |

Instructor/Presenter: David Sager, ComPsych

Program description: Change, uncertainty, and constant demands can challenge even the most experienced leaders. This session explores how stress affects decision-making, performance, and well-being while providing practical tools to build resilience in today's workplace, especially after setbacks. Through real-world strategies and techniques, participants will learn how to identify stressors, strengthen personal resilience, and maintain effectiveness during periods of change. Participants will be able to recognize the impact of stress and apply resilience strategies to enhance personal and professional performance.

Learning Objectives:

- Increase participants' awareness of the signs and symptoms of stress and provide practical strategies for managing stress effectively.
- Strengthen resilience in the face of challenges and setbacks by equipping participants with the skills needed to maintain productivity, adapt to change, and continue making meaningful progress toward both individual and organizational goals.

Instructor/Presenter Bio:

Dr. Dave Sager is a Licensed Professional Counselor and Licensed Professional Counselor Supervisor with more than 35 years of counseling experience. He holds degrees from Abilene Christian University and Oklahoma State University and is a Certified Employee Assistance Professional (CEAP). Dr. Sager serves as the onsite Employee Assistance Program (EAP) counselor for Southwest Airlines, where he provides counseling, consultation, and support to employees. Throughout his career, he has become a sought-after corporate trainer, delivering thousands of hours of professional training. He also has extensive experience leading corporate crisis response efforts, helping organizations and employees navigate critical incidents with expertise and compassion. Known for his engaging presentation style and practical approach, Dr. Sager is dedicated to equipping individuals, leaders, and organizations with the tools they need to build resilience, improve well-being, and thrive both personally and professionally.

Budget Technical Forum

Date/Time: Monday, September 21, 2026, 3:00-4:00 p.m. | **Location:** Omni Las Colinas, Las Colinas, Texas |

Field of Study: Finance | **Classification:** Technical | **CPE Credit:** 1.2 | **Instructor/Presenter:** Kenny Rodriguez (Lamar University) and Jim Gross (UNT System), Co-Chairs

Program description: A technical forum for budget professionals to discuss current financial, legislative, and funding developments affecting higher education budgeting.

Learning Objectives:

- Analyze current financial, legislative, and funding developments affecting higher education budgeting.
- Evaluate approaches to budgeting, forecasting, and resource allocation that support institutional sustainability.

Instructor/Presenter Bios:

Kenny Rodriguez serves as Associate Vice President for Budget and Financial Planning at Lamar University, where he has dedicated the past 17 years to advancing the institution's financial stewardship through progressively responsible leadership roles in finance and administration. In his current position, he leads the university's budget development, financial planning, and strategic resource allocation efforts, supporting institutional priorities and long-term fiscal sustainability.

Most recently, Kenny expanded his leadership responsibilities to include oversight of budgeting operations for Sul Ross State University and Sul Ross State University International, providing strategic financial guidance across multiple institutions within The Texas State University System. His expertise includes higher education budgeting, financial planning, institutional resource management, and collaborative decision-making that aligns financial strategies with organizational goals.

Jim Gross serves as the Assistant Vice Chancellor for Financial Planning & Analysis for the University of North Texas System. He oversees System Administration budgeting, consolidated budget operations, financial systems support, and budget analytics across UNT, UNT Health, UNT Dallas, and UNT System Administration. Jim works closely with campus and system leadership on strategic financial planning, board reporting, business intelligence, and financial systems governance, helping bridge the gap between finance and technology to support data-informed decision-making.

Student Services Technical Forum

Date/Time: Monday, September 21, 2026, 3:00-4:00 p.m. | **Location:** Omni Las Colinas, Las Colinas, Texas | **Field of Study:** Finance | **Classification:** Technical | **CPE Credit:** 1.2 | **Instructor/Presenter:** Kathryn Holder Wisniewski and Jenna Bottorf, Co-Chairs

Program description: A technical forum focused on financial and operational issues affecting student accounts, payment processing, collections, and related higher education service functions.

Learning Objectives:

- Examine financial and operational issues affecting student accounts, payment processing, and collections.
- Analyze regulatory or policy developments impacting student financial transactions and institutional revenue management.

Instructor/Presenter Bios:

Kathryn Holder Wisniewski is the Director of Student Operations, Assessment, and Reporting in Student Business Services at Texas A&M University. She is dedicated to improving the student experience through collaboration, effective communication strategies, and practical applications of technology and AI. Kathryn enjoys finding ways to simplify complex processes, strengthen connections across campus, and share ideas that help higher education better serve students.

Jenna Bottorf serves as Associate Director of Student Business Services at Texas State University, where she oversees student accounting operations, including refunds, tuition assistance billing and invoice reconciliation, and departmental accounting processes. She leads a team of four professionals and collaborates with campus partners to ensure accurate, compliant, and student-centered financial services. Jenna is passionate about process improvement, team development, and enhancing the student experience through effective financial operations.

Primary Members Meeting

Date/Time: Monday, September 21, 2026, 3:00-5:00 p.m. | **Location:** Omni Las Colinas, Las Colinas, Texas | **Field of Study:** Business Management and Organization | **Classification:** Non-Technical | **CPE Credit:** 2.4 | **Instructor/Presenter:** Derek Horton, Deputy CFO at UT System

Program description: A primary member forum for chief business officers and senior business leaders to discuss strategic, operational, legislative, and administrative issues affecting higher education institutions.

Learning Objectives:

- Identify emerging strategic, operational, legislative, and regulatory issues affecting higher education institutions.
- Analyze peer approaches for addressing organizational, financial, and administrative challenges.

Instructor/Presenter Bio

As the UT System chief budget officer, Derek has Systemwide responsibility for coordinating the preparation and maintenance of the UT System operating budget. His responsibilities include advising UT System executive staff on strategic matters that have budget implications, working as needed with UT institution budget officers on institutional budgets, long-range financial planning and preparing legislative appropriations requests. Other responsibilities include designing and implementing the budget process, systems, and policies, including changes to budgeting software, analyzing and preparing budget forecasts, plans, and ad hoc reports, and making recommendations to executive management.

Derek has almost a decade of higher education experience, most recently at the University of Central Florida where he served as Assistant Vice President, Budget Planning & Administration and prior to this role, he served as Assistant Vice President & University Controller at Florida Polytechnic University and Associate Director, Finance & Administration at Florida Atlantic University. Over the course of his career, he has honed his skills in a myriad of different roles with ever increasing leadership responsibilities that he brings to the position of Associate Vice Chancellor, Budget and Planning.

Accounting Principles Technical Forum

Date/Time: Monday, September 21, 2026, 4:00-5:00 p.m. | **Location:** Omni Las Colinas, Las Colinas, Texas | **Field of Study:** Accounting | **Classification:** Technical | **CPE Credit:** 1.2 | **Instructor/Presenter:** Robert Sprague, CPA, Forvis Mazars

Program description: A technical forum for accounting professionals to discuss accounting standards, reporting requirements, and implementation practices affecting higher education institutions. The presenter will identify common accounting fraud schemes and fraudulent financial reporting techniques, and evaluate the accounting red flags, journal entry anomalies, and internal control weaknesses associated with their occurrence.

Learning Objectives:

- Identify common accounting fraud schemes and fraudulent financial reporting techniques, and evaluate the accounting red flags, journal entry anomalies, and internal control weaknesses associated with their occurrence.
- Apply forensic accounting methodologies to assess financial statement integrity, investigate potential accounting irregularities, and support compliance with accounting and financial reporting requirements.

Instructor/Presenter Bio

Bob is a Managing Director at Forvis Mazars and a member of the firm's Forensics and Valuation practice, where he specializes in fraud investigations, forensic accounting, and litigation consulting. With more than 22 years of experience at two global professional services firms and prior service as an enforcement accountant with the SEC, he has led complex investigations involving SEC enforcement matters, fraudulent financial reporting, the Foreign Corrupt Practices Act, accounting disputes, and corporate compliance programs. Bob works closely with corporate leaders, legal counsel, auditors, and special committees to address high-stakes financial matters across a wide range of industries. He is also a recognized educator and speaker, having taught forensic accounting as an adjunct professor at Northeastern University for more than a decade and regularly delivering professional training on fraud investigation and forensic accounting.

Asset Management Technical Forum

Date/Time: Monday, September 21, 2026, 4:00-5:00 p.m. | **Location:** Omni Las Colinas, Las Colinas, Texas | **Field of Study:** Accounting | **Classification:** Technical | **CPE Credit:** 1.2 | **Instructor/Presenter:** Jeff Riley, Texas State Tech College; Rick Dillard, UT MD Anderson Cancer Center and Sonia Aguilar, UTHealth Houston

Program description: A technical forum addressing capital assets, inventory, asset stewardship, internal controls, documentation, and related accounting and reporting considerations.

Learning Objectives:

- Identify accounting and reporting considerations associated with capital assets, inventory, and asset stewardship.
- Evaluate internal control and documentation practices that support accurate asset accounting and reporting.

Instructor/Presenter Bios

Jeff Riley, Director of Property Management at Texas State Technical College, oversees statewide asset management operations across 11 campuses, managing more than 22,000 assets valued at approximately \$729 million and leading the implementation of an RFID tracking system in 2024.

Rick Dillard, Manager of Asset Finance Operations at UT MD Anderson Cancer Center, has more than 40 years of experience and manages over 30,000 institutional assets valued at more than \$3 billion, along with records management and long-term leadership in the property management profession.

Sonia Aguilar, Assistant Director of Capital Assets Management at UTHealth Houston, has 20 years of experience supporting capital asset compliance, financial reporting, and surplus management, while also serving as Co-Chair of the TACUBO Asset Management Technical Forum.

Health Related Institutions Technical Forum

Date/Time: Tuesday, September 22, 2026, 7:15-8:15 a.m. | **Location:** Omni Las Colinas, Las Colinas, Texas | **Field of Study:** Finance | **Classification:** Technical | **CPE Credit:** 1.2 | **Instructor/Presenter:** Scott Barnett, Chair will host

Program description: A technical forum focused on financial and operational trends affecting health-related institutions and academic health centers.

Learning Objectives:

- Analyze financial and operational trends affecting health-related institutions and academic health centers.
- Evaluate financial management strategies used to address emerging challenges within health-related institutions.

Instructor/Presenter Bio:

Scott Barnett is the Assistant Vice President for Budget and Financial Reporting at UTHealth Houston, responsible for overseeing financial reporting, budgeting, and legislative appropriations, a role he has held permanently since July 2022 after serving in interim capacity since September 2021. He joined UTHealth Houston in 2006 as a Legislative Research Analyst and transitioned to the Budget and Financial Reporting office in 2012 as Manager. Prior to UTHealth, Scott worked as a legislative aide for State Senator Chris Harris from 2002 to 2005 and briefly in the Enforcement division of the Texas Commission on Environmental Quality. Originally from Fort Worth, Scott holds a Bachelor's degree in Political Science from The University of Texas at Arlington and currently lives in Sugar Land with his wife.

Session 5 – Policing in Higher Education – The Work Behind the Badge

Date/Time: Tuesday, September 22, 2026, 8:30-9:30 a.m. | **Location:** Omni Las Colinas, Las Colinas, Texas | **Field of Study:** Business Management and Organization | **Classification:** Non-Technical | **CPE Credit:** 1.2 | **Instructor/Presenter:** Ramona Washington – UNT Police Chief, Ed Reynolds, UNT Police Chief of Staff.

Program description: This session gives university business officers, finance administrators, and campus police leaders an inside look at the often-unseen work of a modern campus police department, using the University of North Texas Police Department as a real-world case study. It explores how 24/7 operations, threat assessment, technology, and innovative programs—including mentoring, behavioral threat assessment, co-responder mental health services, and a certified community support dog—strengthen campus safety, build trust, and improve institutional risk management. By linking police investments to measurable outcomes such as response times, clearance rates, accreditation, and community engagement, the session demonstrates how campus policing serves as a strategic partner in student success, institutional reputation, and responsible fiscal stewardship rather than simply a budget expense.

Learning Objectives:

- Identify the behind-the-scenes operational activities of a university police department — including calls for service, investigative functions, threat assessment, and emergency management — and articulate their direct connection to campus safety outcomes and institutional risk mitigation.
- Evaluate how targeted internal investments in officer culture, training, wellness, and innovative community programs — such as co-responder models, mentorship pipelines, and technology infrastructure — produce measurable returns in clearance rates, community trust, reduced turnover, and long-term operational efficiency.
- Apply a value-based framework for reviewing campus police budget requests that align public safety investment decisions with enrollment growth projections, accreditation standards, and the institution's broader strategic mission.

Instructor/Presenter Bios

Ramona Washington serves as Chief of Police at the University of North Texas, where she leads a department of approximately 65 sworn officers and civilian staff protecting a campus community of more than 46,000 students across Denton, Discovery Park, and Frisco. Under her leadership, the UNT Police Department has maintained dual accreditation through both CALEA Advanced and IACLEA — a distinction held by fewer than 5% of law enforcement agencies nationwide — while launching signature initiatives including a formal mentoring program, a behavioral threat assessment team, a co-responder mental health partnership, and a certified community support canine program. Chief Washington is a frequent voice on the intersection of campus safety culture, community trust, and the business of higher education policing.

Ed Reynolds serves as Chief of Staff for the University of North Texas Police Department, where he plays a central role in aligning the department's administrative operations, strategic initiatives, and community programs with the broader institutional mission of a campus serving more than 46,000 students. In his role, Reynolds oversees key departmental programs that bridge internal culture and external community engagement — including the department's formal mentoring program, special events operations, and employee wellness efforts that directly support officer retention and professional development. A dedicated advocate for the value of campus public safety, Reynolds brings a practitioner's perspective to conversations about the business of policing in higher education and the return on investment that thoughtful, community-centered law enforcement delivers to universities and their stakeholders.

Technical Forums Insights

Date/Time: Tuesday, September 22, 2026, 9:30-10:00 a.m. | **Location:** Omni Las Colinas, Las Colinas, Texas | **Field of Study:** Business Management and Organization | **Classification:** Non-Technical | **CPE Credit:** 0.6 | **Instructor/Presenter:** TACUBO Technical Forum Chairs

Program description: A plenary synthesis of insights and emerging themes from TACUBO technical forums.

Learning Objectives:

- Summarize key issues, trends, and emerging practices identified during TACUBO technical forums.
- Assess opportunities for collaboration and information sharing among higher education business officers.

Session 6 - Service and Funding Models for the Texas State Technical College and Texas A&M Transportation Institute

Date/Time: Tuesday, September 22, 2026, 10:30-11:45 a.m. | **Location:** Omni Las Colinas, Las Colinas, Texas | **Field of Study:** Finance | **Classification:** Technical | **CPE Credit:** 1.5 | **Instructor/Presenter:** Chad Wooten and Anju Motwani with Texas State Technical College and Rodney Horell and Tyler Theobald with Texas A&M Transportation Institute leadership

Program description: Leadership from the Texas State Technical College and Texas A&M Transportation Institute will share their service and funding models and discuss how their work supports education, safety, and public impact in Texas.

Learning Objectives:

- Describe service and funding models used by the Texas State Technical College and Texas A&M Transportation Institute.
- Analyze how institutional mission, service delivery, and funding structures influence operational and financial strategy.

Instructor/Presenter Bios

Chad Wooten is the Vice Chancellor and Chief Financial Officer of TSTC, bringing extensive experience in finance, operations, organizational leadership, and nonprofit governance. A Certified Public Accountant (CPA), he is recognized for aligning financial strategy with institutional goals, fostering a strong organizational culture, and positioning the college for long-term growth and fiscal sustainability.

Rodney Horrell is the Executive Assistant Agency Director and Chief Operating Officer at the Texas A&M Transportation Institute, where he oversees research development, contract management, communications, facilities, safety, support, and events. A Certified Public Accountant (CPA) and Certified Internal Auditor (CIA), he has leadership experience in both the public and private sectors, including Deloitte, AT&T, and The Texas A&M University System, and previously served as TTI's Chief Financial Officer.

Tyler Theobald is the Senior Assistant Agency Director and Chief Financial Officer at the Texas A&M Transportation Institute, leading the institute's financial operations, budgeting, legislative appropriations, and fiscal management. With a background in public accounting at Ernst & Young and financial leadership roles at the Texas A&M Forest Service and TTI, he brings extensive expertise in government finance and strategic fiscal oversight.

Anju Motwani serves as TSTC's Controller, providing statewide leadership for accounting, financial reporting, and cash management. As a Texas Certified Public Accountant (CPA) with a background in financial auditing, Anju combines a strong foundation in public accounting with extensive financial oversight experience to ensure fiscal stewardship and operational excellence. Her global perspective, shaped by living in Belize, Mexico, India, and the United States, along with fluency in four languages, enhances her collaborative leadership style. Anju is dedicated to advancing TSTC's mission by fostering sound financial practices that support student success and the college's long-term strategic goals.