



## Senior Administrative/Fiscal Officers

2006 Annual Meeting

### THE WINDS OF CHANGE

The Hotel Viking  
Newport, Rhode Island  
July 27 – 29, 2006

#### AGENDA

*Thursday, July 27, 2006*

1:00 pm     **REGISTRATION**

2:00 pm     **WELCOME AND INTRODUCTIONS**

Elizabeth Nunnally, MA, CPA  
Chief Financial Officer, Academic Health Center  
University of Minnesota  
*Co-chair, SAFO Planning Committee*

Richard J. Schmid, MBA, CPA  
Vice President for Finance & Chief Financial Officer  
Thomas Jefferson University  
*Co-chair, SAFO Planning Committee*

#### **STRATEGIC PLANNING AND ALLOCATION OF RESOURCES**

2:15 pm     **ALIGNMENT OF STRATEGIC PLANNING AND  
ANNUAL BUDGETING PROCESS**

Richard J. Schmid, MBA, CPA  
Vice President for Finance & Chief Financial Officer  
Thomas Jefferson University

H. Steven Lynch, MPA, CPA  
Executive Vice President for Business Affairs & CFO  
The University of Texas Health Science Center at San Antonio

**Strategic Planning for the Clinical Enterprise of the University of Utah Health Sciences Center**

James R. Bardsley, PhD  
Associate Vice President for Finance and Planning  
University of Utah Health Sciences Center

- 3:15 pm     **CAPITAL PLANNING AND DEBT POLICY**  
Bret L. Perisho, CPA  
Director of Finance and Strategic Business Development  
Vanderbilt University
- 3:45 pm     **BREAK**
- 4:15 pm     **FINANCING AND MANAGING THE RESEARCH ENTERPRISE**  
Kevin Lang, MBA, CPA  
Executive Vice President for Finance and Administration and CFO  
Loma Linda University Adventist Health Sciences Center  
Loma Linda University
- 4:45 pm     **ADJOURN**
- 6:00 pm     **RECEPTION AND DINNER**

***Friday, July 28, 2006***

- 8:00 am     **CONTINENTAL BREAKFAST**

**COMPLIANCE**

- 8:30 am     **TAX EXEMPT BOND FINANCING**  
Perry E. Israel, JD  
Tax Partner  
Orrick, Herrington & Sutcliffe LLP
- 9:15 am     **ROUNDTABLE DISCUSSION: IRS TAX COMPLIANCE**  
  
Denise Mulkern, CPA (Moderator)  
Senior Vice President for Administration and Finance  
University of Medicine and Dentistry of New Jersey  
  
Melony Williams Goodhand, CPA, MS  
Vice Chancellor for Finance and Chief Financial Officer  
University of Arkansas for Medical Sciences  
  
Elizabeth Nunnally, MA, CPA  
Chief Financial Officer, Academic Health Center  
University of Minnesota
- 10:00 am    **Tax Exempt Hospitals**  
Jane E. Jordan, JD  
Deputy General Counsel/Chief Health Counsel  
Office of the General Counsel  
Emory University

10:30 am **BREAK**

11: 00 am **OPEN DISCUSSION: ISSUES OF CONCERN SAFO GROUP**

Elizabeth Nunnally, MA, CPA  
Chief Financial Officer, Academic Health Center  
University of Minnesota

Richard J. Schmid, MBA, CPA  
Vice President for Finance & Chief Financial Officer  
Thomas Jefferson University

Noon **ADJOURN**

***Saturday, July 29, 2006***

**NEW PERSPECTIVES ON ISSUES**

8:30 am **CONTINENTAL BREAKFAST**

9:00 am **REVIEW AAHC SURVEY**

10:00 am **Break**

10:30 am **SUCCESSION PLANNING AND LEADERSHIP**

James D. Hess, EdD  
Vice President for Health Care Administration and  
Chief Operating Officer  
Oklahoma State University Center for Health Sciences

11:00 am **BUSINESS MEETING**

11:30 am **AAHC UPDATE**

Steven A. Wartman, MD, PhD  
President  
Association of Academic Health Centers

Noon **ADJOURN**