



Letter from the Chair of  
The Treasury Institute for Higher Education

As we come to the end of fiscal year 2022 and look forward to a new year, I wanted to share some updates on what has been happening with the Treasury Institute for Higher Education (the “Institute”).

Over the past two years, all of us have gone from normal day-to-day operations to an ever evolving, new normal of both virtual and in-person interactions. We are pleased that the Institute was able to continue its mission and deliver programs both virtually and in-person to our community during this time of uncertainty.

*Mission Statement: The mission of the Institute is to provide superior-quality, practitioner-driven content within the higher education treasury and finance community by connecting people, ideas, and solutions.*

In the past months we welcomed the opportunity to see colleagues at Treasury Symposium 2022 and the PCI DSS Workshop 2022, both held in Savannah. These important programs were held virtually in the past two years, so it was wonderful to be together again in 2022.

This summer we again will partner with SACUBO’s CBMI program at the University of Kentucky to facilitate the Treasury Track, twenty hours of treasury education geared to give new officers a solid foundation in Treasury Management. The week-long program will be back at the university for the first time in three years.

Since the beginning of the pandemic the Institute facilitated discussions on how universities were addressing unprecedented challenges and positioning themselves to move forward. In the past two years the Institute hosted twelve Senior Officer Roundtables each involving twenty to thirty officers from across the country. These discussions provided opportunities to share best practices and highlight new strategies in our “new normal”.

The Institute continues to evolve in its twenty-third year since inception. We are excited to broaden the PCI DSS Workshop to a more comprehensive program focusing on payments and payment risk as well as PCI DSS compliance. To best manage this expansion, we are transitioning the workshop to The Payments Academy, a new venture created by PCI DSS Workshop Co-Chairs Ron King and Ruth Harpool. The Institute will continue to partner with this new venture to help it grow and be successful.

A few recognitions are in order. First, I want to thank the Institute Board for their tremendous work through these challenging times, and through my first year as Chair. I want to especially recognize Jim Matteo for his steady Institute Board leadership over the last four years. His shoes will be extremely hard to fill. Next, I want to acknowledge the strong vision and

tremendous energy that Jon Speare and Dennis Reedy have put into the Institute over the last two-plus decades. They continue to drive us all forward with grace and humility. Jenn Kirkwood has been the Institute's meeting planner since 2018 and has masterfully managed both our virtual and in-person programs through these interesting times. I also want to thank Susan Krauss for joining the Institute staff last year. We are thrilled to have her capabilities and enthusiasm as we focus on the future. Everyone on the Board greatly appreciates Jon, Dennis, Jenn and Susan's dedication and hard work.

And finally, a transition to announce. Mary Peloquin-Dodd has announced her retirement from the Institute's Board later this year. She has been a great asset to the Institute during her four years of service on the Board. Her work guiding Symposium content as Board liaison to the Program Committee led to many excellent and engaging sessions.

To all our Partners, Practitioners and Supporters, who make the Institute successful, all the best and enjoy the summer!

Chris Malins,  
Chair, The Treasury Institute for Higher Education