



FINANCIAL RATIOS: STRATEGIC ASSESSMENT AND COMMUNICATION OF YOUR INSTITUTIONAL HEALTH

January 23, 2017 :: 1:00 - 2:40 p.m. EST

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Improve your ability to interpret your institution's CFI and overall financial health.
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OVERVIEW

Analyze your Composite Financial Index (CFI) more meaningfully and use it to engage key stakeholders in a conversation about your institution's financial health. During this webcast, you will have the opportunity to use sample institutional profiles to apply what you learn and better answer strategic questions, including:

- How long could you operate with no influx of revenues?
- Are your reserves strong enough to pay your total debt in case of an emergency?
- Is the return on your net assets sufficient to ensure your financial sustainability?
- Are you able to cover operating expenses with recurring revenues?

FOUNDATIONAL RESOURCES FOR FINANCIAL RATIOS

Included with your registration are resources that will help you gain a fundamental understanding of how to calculate financial ratios and your CFI, including:

- An overview and introduction to financial ratios
- A step-by-step instruction guide for completing your CFI
- Templates for calculating principal ratios and CFI that are tailored to your institution type (public, private, Canadian)

[VISIT EVENT PAGE](#)

www.academicimpressions.com/webcast/financial-ratios-strategic-assessment-and-communication-your-institutional-health



WHO SHOULD ATTEND

This webcast is designed for an institution's financial managers, including CFOs, controllers, and budget directors. It's also open to anyone on campus with an interest in accounting and finance who would like to understand more about financial health in higher education through use of ratios, including department and student body representatives. We welcome institutions from both the United States (public and private) and Canada to participate.

LEARNING OUTCOME

After participating in this online training, you will have improved ability to interpret and communicate your institution's overall financial health utilizing the Composite Financial Index.

CONTACT US FOR MORE INFORMATION

Contact Grace C. Spivak, Associate Program Manager at grace@academicimpressions.com or 720-988-1233 if you'd like additional information about the program.



AGENDA

Monday, January 23, 2017 :: 1:00 - 2:40 p.m. EST

➔ **Critical questions for assessing institutional health**

- How long could you operate with no influx of revenues?
- Are your reserves strong enough to pay your total debt in case of an emergency?
- Is the return on your net assets sufficient to ensure your financial sustainability?
- Are you able to live within your means, i.e. cover operating expenses with recurring revenues?

➔ **Risk assessment and financial strategies based on your institutional profile**

- Appropriately leveraging available resources
- Paying significant attention to cost management
- Prioritizing enrollment and tuition revenues
- Interactive quiz: test your own ability to assess institutional health

➔ **Keys to involving stakeholders in the financial conversation**

- Focusing information to improve clarity and transparency
- Showing the merits of strategic opportunities through financial ratios to board, faculty, and students
- Mixed audience strategies for meeting formats and learning styles

➔ **Steps forward for financial health and transparency**

INSTRUCTOR

Larry Goldstein, President, Campus Strategies, LLC

Larry is the president of Campus Strategies, LLC, a higher education management consulting firm. His consulting interests cover a wide range of topics, including higher education budgeting, strategic planning, accounting, and finance. He writes and speaks frequently on these topics. He is the author of *A Guide to College and University Budgeting: Foundations for Institutional Effectiveness* and has co-authored several publications, including *Presidential Transitions*.

Immediately prior to establishing Campus Strategies, LLC, Goldstein served as senior vice president and treasurer of the National Association of College and University Business Officers (NACUBO). He joined NACUBO after spending twenty years in higher education financial administration. In his last campus position, he served as the University of Louisville's chief financial officer and has also held administrative appointments with the University of Chicago, the School of the Art Institute of Chicago, and the University of Virginia.



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EARLY BIRD PRICING

Postmarked on or before January 17, 2017. After January 17, 2017, an additional \$75.00 fee for the first connection and \$50.00 fee for each additional connection applies.

[REGISTER ONLINE](#) or below.

PAYMENT METHOD:

We accept Visa, MasterCard, and American Express credit cards. To pay by check, include the check with this form or select the "invoice me" option. Fax form to 303.221.2259 or mail form along with payment to: Academic Impressions, 4601 DTC Blvd., Ste. 800, Denver, CO 80237.

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