



ACADEMIC AND FINANCIAL PARTNERSHIPS: CREATING AN ENGAGEMENT PLAN FOR BUDGET IMPLEMENTATION

February 15, 2017 :: 1:00 - 2:30 p.m. EST

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Engage finance and academic leaders in the research, design, and implementation of a budget model.

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OVERVIEW

Learn how to better focus your budgeting process to engage finance and academic leaders in the research, design, and implementation of a budget model. We will highlight phases of an academic leadership engagement plan for authentic collaboration. Following this webcast, you will be better prepared to:

- Structure your budget timeline to allow for collaboration
- Provide training and support for committee members and leadership
- Build guiding principles to ensure the budget meets your strategic priorities
- Use visual displays to build consensus and improve transparency
- Create a continuous improvement feedback cycle for ongoing monitoring

This program is designed for financial and academic leaders who are considering a new or improved budget model within their department and/or institution.

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www.academicimpressions.com/webcast/academic-and-financial-partnerships-creating-engagement-plan-budget-implementation



LEARNING OUTCOME

After participating in this online training, you will be better able to create an engagement plan for designing and rolling out a new budget model in partnership with academic and financial leadership.

AGENDA

Wednesday, February 15, 2017 :: 1:00 - 2:30 p.m. EST

- ➔ **Preliminary Stage: Opening the Communication Channel**
 - Understand the complexity and time required for implementing various budget models
 - Set an achievable timeline to engage with all campus groups
 - Surveys, interviews and data collection process
- ➔ **Research Phase: Provisions for Steering Committee**
 - Incorporating training for committee member development
 - Establishing your guiding principles
 - Research framework for budget models
 - Conducting your current state assessment
- ➔ **Design Phase: Things to keep in mind**
 - Simplifying and streamlining the process
 - Approaching challenges with charge-back models
 - Accounting for overhead
 - Creating iterative feedback loops
- ➔ **Implementation Phase: Ramp Up Engagement**
 - Consider “hold harmless period”
 - Training unit and department finance leaders on new process
 - Meet with all unit heads to confirm understanding of new model
- ➔ **Post-implementation feedback and communication**
- ➔ **Tips for a realistic engagement plan**



INSTRUCTOR

Maria R. Anguiano, Vice Chancellor for Planning and Budget at the University of California, Riverside.

Maria oversees campus-wide strategic planning, financial planning and analysis, institutional research, and capital asset strategies. She is responsible for managing a budget of \$800 million.

Ms. Anguiano has also served as a senior advisor to the Bill and Melinda Gates Foundation Postsecondary Success Team. Prior to this work, Ms. Anguiano worked at Barclays Capital in public finance investment banking, and at Deloitte & Touche in corporate and nonprofit auditing and financial statement analysis.

She currently serves on the board of The James Irvine Foundation and the Impact Board. Ms. Anguiano holds an MBA from the Stanford Graduate School of Business and a BA in Economics-Accounting and Spanish from Claremont McKenna College.



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