



# KEY DECISIONS FOR DECENTRALIZED BUDGETING IMPLEMENTATION

April 25, 2017 :: 1:00 - 2:40 p.m. EDT

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*Get answers to some of your most challenging questions when making the move to a decentralized budget model.*

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## OVERVIEW

Join us online to discuss the pros, cons, and impact of critical decisions related to revenue and expense allocation in a decentralized budget model. Featuring lessons learned from Miami University and South Dakota State University, this training is perfect for institutions that are preparing to implement decentralized budgeting, but want to do so in a deliberate and planned manner. This training will help you determine your own method for:

- Establishing provisions for specialized programs
- Determining recovery and chargeback for facilities and administrative costs
- Accounting for off-campus provisions and cross-listed courses
- Ensuring appropriate oversight, decision making, and communication

VISIT EVENT PAGE

[www.academicimpressions.com/webcast/key-decisions-decentralized-budgeting-implementation](http://www.academicimpressions.com/webcast/key-decisions-decentralized-budgeting-implementation)

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## WHO SHOULD ATTEND

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This webcast is designed to appeal to all those involved in making decisions surrounding the tax, chargeback, and revenue/expense allocations of a decentralized budget model. This may include:

- Chief Financial Officers
- Deans considering RCM
- Budget Officers
- Financial Analysts
- RCM Manager

## LEARNING OUTCOME

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After participating in this online training, you will be able to make more informed decisions for implementing a decentralized budget model.

## CONTACT US FOR MORE INFORMATION

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



## AGENDA

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Tuesday, April 25, 2017 :: 1:00 - 2:40 p.m. EDT

- ➔ **DECISION SET 1: Pre-implementation needs**
  - Management and technology infrastructure
  - Engaging budget and oversight committee
  - Communication plan
- ➔ **DECISION SET 2: Revenue allocation decisions**
  - Establishing distinctions between units
  - Weighting based on value/cost characteristics
  - Determining the distribution methodology
- ➔ **DECISION SET 3: Direct and Indirect Expense allocation decisions**
  - Clarify central or delegated decision making authority
  - Determining methodology for facilities and administration
  - Relegating decision making authority
- ➔ **Post-Implementation monitoring**

## INSTRUCTORS

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### **David A. Ellis, PhD, Associate Vice President of Budgeting & Analysis, Miami University**

David Ellis joined Miami University in his current role in 2011. He oversees the revenue forecasting and the development and implementation of the university's operating budget. He has led the university's implementation of performance budgeting and business intelligence projects. Prior to joining the university, David served in a variety of roles in state government focusing on budgeting, performance management, and state political economy. He earned his Ph.D. from West Virginia University.

### **Mike Holbeck, Director of Finance and Budget, South Dakota State University**

Mike has been employed at South Dakota State University for nearly ten years and has filled various roles within the Office of Finance and Business over this time period. He received bachelor's degrees in mathematics and agricultural business, as well as a master's degree in economics from SDSU. He is currently finishing his dissertation for a PhD in sociology, and is studying differential pricing and resource allocation in higher education.

His current role at SDSU includes university-wide financial modeling, policy development, and financial reporting and analysis. Over the last couple of years, one of his major undertakings has been helping to lead the change from a historically incremental budget model to a new Decentralized Budget Model (DBM). He has been involved in all phases of the change from the theoretical side, including the research and policy recommendation, through the development of four white papers, to the implementation side, including redesigning their financial accounting process and developing reports and simulation tools to help drive efficiencies and improve forecasting.



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### EARLY BIRD PRICING

Postmarked on or before April 18, 2017. After April 18, 2017, an additional \$75.00 fee for the first connection and \$50.00 fee for each additional connection applies.

[REGISTER ONLINE](#) or below.

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