



CONFERENCE

# PRIORITIZING ACADEMIC AND ADMINISTRATIVE PROGRAMS

October 1 - 2, 2015

Orlando, FL



**EducationMetrics**  
Performance Partner to Higher Education  
[metricsedu.com](http://metricsedu.com)

**ai** ACADEMIC  
IMPRESSIONS



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*Bring your team to prioritize your most important academic and administrative programs.*

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## OVERVIEW

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Many institutions have been operating in a financially unsustainable way for many years. Campus leaders now face critical questions and challenges as they are forced to reduce or restructure their program offerings:

- How can you be sure your institution is ready to begin the prioritization process?
- Which programs are most important to your institution's mission, overall financial health, and competitiveness?
- How do you ensure your institution is stronger as a result of prioritization?

Join Bob Dickeson and Larry Goldstein for an in-depth examination of a proven method for prioritizing academic and administrative programs.

## PROGRAM FORMAT AND RESOURCES

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This program is based in large part on Bob Dickeson's book, *Prioritizing Academic Programs and Services*. Included in your registration fee is a complimentary copy of this resource-rich book which can be helpful as a guide to the process and to building buy-in for this effort.

This program is highly focused on the application of these concepts to your specific campus context. The output from the various group activities will be documented and shared out to each participant after the program, so you can take back a range of ideas and solutions that might work for your campus.

## FREE PRE-EVENT WEBCAST RECORDING: PRIORITIZING ACADEMIC AND ADMINISTRATIVE PROGRAMS 101

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Every attendee will receive free access to this highly rated recording upon conference registration. This webcast explores the basic concepts of academic and administrative program prioritization to ensure an institution's resources are creating the greatest value. Share this resource with your team!

VISIT EVENT PAGE

<https://www.academicimpressions.com/conference/prioritizing-academic-and-administrative-programs-oct-2015>



## WHO SHOULD ATTEND

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Given the leadership support required to successfully implement such an effort, we have specially designed this program for teams of institutional executives. Chief financial officer and chief academic officers should consider attending this event as a team. Program prioritization is a data-intense effort and representatives from institutional research will benefit from attending as well. If your institution is early in the process of considering how prioritization can work for your campus, we encourage your institution's president to attend.

## LEARNING OUTCOME

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After participating in this conference, you will be able to determine if and how to implement the Dickeson program prioritization model on your campus.

## CONTACT US FOR MORE INFORMATION

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Contact Patrick Cain, Conference Director at [patrick@academicimpressions.com](mailto:patrick@academicimpressions.com) or 720-988-1263 if you'd like additional information about the program.

## CPE CREDITS

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Recommended CPE Credits: 15  
Program Field of Study: Specialized Knowledge and Applications  
Delivery Method: Group-Live  
Prerequisites: None  
Program Level: Basic

Academic Impressions is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Nashville, TN, 37219-2417.  
Website: [www.nasba.org](http://www.nasba.org)



## AGENDA

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### THURSDAY, OCTOBER 1, 2015

8:00 - 8:30 a.m.

**Registration and Continental Breakfast (included in registration fee)**

8:30 - 9:00 a.m.

**Welcome, Introductions, and Program Overview**

9:00 - 9:45 a.m.

**Approaches to Engage Faculty**

Faculty are likely to be the greatest source of resistance to program prioritization, but their involvement in and ownership of the process is key to its success. In this opening session we'll tackle the stickiest issue first and explore:

- Who to involve and how—task force participation, information sessions, etc.
- Addressing low trust, low morale, and past planning or prioritization failures
- Shifting from a delegate to trustee mindset
- Minimizing fear and uncertainty and tackling the rumor mill

9:45 - 10:00 a.m.

**Break**

10:00 - 11:15 a.m.

**Essential Elements of Inclusive and Transparent Processes**

Most prioritization efforts are derailed due to process and people issues. In this session we'll explore essential elements of inclusive, transparent planning processes including:

- Building a credible task force
- Creating guiding principles
- Designing effective communication systems

11:15 a.m. - 12:00 p.m.

**Assessing Your Readiness for Prioritization**

Before undertaking prioritization, institutions should look ahead to determine their capacity to manage a change effort of this scale and importance. In this session you'll assess your readiness in several areas including:

- Communication
- Collaboration
- Trust
- Decision making
- Transparency

12:00 - 1:00 p.m.

**Lunch (included in registration fee)**



## THURSDAY, OCTOBER 1, 2015 (CONTINUED)

1:00 - 1:30 p.m.

### **Reaffirming Institutional Mission**

Alignment with institutional mission is a key factor in how you ultimately rank and prioritize programs, but at many campuses, the mission statement does not offer a sufficient grid by which to measure a program against. In this session we'll explore alternative options such as adopting an operational mission or program direction statement for use in prioritization. We'll also have the opportunity to workshop your mission statement to identify strengths and weaknesses relative to this effort.

1:30 - 2:30 p.m.

### **Defining Programs and Allocating Costs**

Defining programs and allocating costs is key to ensuring fair and accurate results, but there are layers of complexities involved—especially when faculty and other resources are shared across programs. In this session we'll explore:

- How to define administrative and academic programs
- Identifying and allocating costs between multiple programs within one administrative or academic department

2:30 - 2:45 p.m.

### **Break**

2:45 - 3:45 p.m.

### **Selecting Appropriate Criteria**

While institutions should adopt or adapt criteria that fit their unique culture and context, Bob Dickeson's research has revealed ten criteria that ensure a comprehensive and balanced analysis of each program. In this session, participants will review:

- 10 criteria—including what they mean and how to measure them
- How different institutions might weight criteria differently
- How to engage faculty and staff to take ownership of the criteria

3:45 - 4:30 p.m.

### **Weighting the Criteria**

Just as programs have different value to an institution, so too do criteria. In this session we'll discuss different and credible approaches for weighting the criteria, and give you an opportunity to create a customized set of weighted criteria for your own institution.

4:30 - 5:30 p.m.

### **Networking Reception (included in registration fee)**

## FRIDAY, OCTOBER 2, 2015

8:00 - 8:30 a.m.

### **Continental Breakfast (included in registration fee)**

8:30 - 9:00 a.m.

### **Day 1 Review and Q&A**



## FRIDAY, OCTOBER 2, 2015 (CONTINUED)

9:00 - 10:15 a.m.

### **Unique Considerations for Reviewing Administrative Programs**

It is strongly advisable to review both academic and administrative programs concurrently, though administrative programs require a different set of criteria and considerations for prioritization. In this session we will explore unique considerations for reviewing administrative programs including:

- Outsourcing options
- Customer focus
- Technological improvements
- Process streamlining
- Collaboration

10:15 - 10:30 a.m.

### **Break**

10:30 - 11:15 a.m.

### **Group Activity: Measuring the Criteria**

Data is at the heart of prioritization, but as you begin to examine the criteria closely, there are multiple indicators of data that could work for each one. In this interactive session, participants will work together to identify data indicators and sources for each of the ten criteria. This invaluable resource will be captured and shared with you following the program.

11:15 a.m. - 12:30 p.m.

### **Implementation Considerations**

Successful implementation is key to ensuring that prioritization leaves your institution stronger as a result of decisions that are made and carried out with integrity, care, and respect for all those involved. In this session we'll explore complex issues involved in implementation including:

- Scoring and ranking each program
- Legal and accreditation considerations
- Dealing with staff reallocation
- Working within existing governance structures
- Integrating with parallel planning efforts

12:30 - 1:30 p.m.

### **Lunch (included in registration fee)**

1:30 - 2:30 p.m.

### **Case Study**

In this case study we'll see how one institution successfully completed the process, how they tackled critical issues, and ultimately how they made prioritization work for their campus.

2:30 - 2:45 p.m.

### **Break**

2:45 - 3:30 p.m.

### **Action Planning**

In our final sessions, you will create an action plan that will guide your initial steps when you return to campus. Our program faculty will be available to consult with you one-on-one as you begin to identify initial steps and actions, goals, partners to engage, and resources required.

3:30 - 4:00 p.m.

### **Final Q&A and Program Wrap-up**



## INSTRUCTORS

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### **Robert C. Dickeson, President Emeritus, University of Northern Colorado**

Robert C. Dickeson provides counsel from multiple leadership perspectives: chair of the governor's cabinets in two states, university president, business CEO, and foundation executive. Dickeson served as the director of the department of administration and chair of the cabinet of Arizona Gov. Bruce Babbitt; and chief of staff, executive director of the office of state planning and budget, and chair of the cabinet of Colorado Gov. Roy Romer. He served in administrative posts at three universities and was president of the University of Northern Colorado from 1981-91. He served as president and CEO of Noel-Levitz Centers Inc., division president of USA Enterprises Inc., and senior vice president of USA Group Inc., heading the USA Group Foundation. From 2000 to 2005, he was co-founder and senior vice president of Lumina Foundation for Education.

While at Lumina Foundation, he led the national initiative on college costs, based on his monograph, *Collision Course: Rising College Costs Threaten America's Future and Require Shared Solutions* (Lumina Foundation, 2004). His book, *Prioritizing Academic Programs and Services* (Jossey-Bass Publishers, 1999, 2010) was based on his extensive consulting experiences including serving several hundred two- and four-year colleges (private and public) and corporations ranging from hospitals to bank holding companies. During 2006, he served as senior policy adviser to the Spellings Commission on the Future of Higher Education.

### **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 20 years in higher education financial administration. In his last campus position, he served as the University of Louisville's chief financial officer. Before that, he held administrative appointments with The University of Chicago, the School of the Art Institute of Chicago, and the University of Virginia.

### **Dr. Anny Morrobel-Sosa, Provost and Senior Vice President for Academic Affairs, Lehman College - City University of New York**

Reporting directly to the president, Dr. Morrobel-Sosa serves as chief academic officer of the college and serves as the executive office in the president's absence. Dr. Morrobel-Sosa works closely with the deans of five academic schools (arts and humanities, continuing and professional studies, education, health sciences, human services and nursing, and natural and social sciences), and vice presidents and associate provosts in the offices of enrollment management, academic programs, academic personnel, research and external support, international programs and global partnerships, institutional research, planning and assessment, and the library to promote the college's academic vision across and beyond the campus, and contribute to building the institution's academic reputation and national and international visibility.

A native of the Dominican Republic, Dr. Morrobel-Sosa has held prior faculty and administrative positions at University of Alabama, California Polytechnic State University, Georgia Southern University, and University of Texas at El Paso.



## LOCATION

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October 1 - 2, 2015 :: Orlando, FL

### HOTEL

Westin Orlando Universal Blvd  
9501 Universal Blvd  
Orlando, FL 32819

To reserve your room, please click [here](#) or call 407.233.2200. Please indicate that you are with the Academic Impressions group to receive the group rate.

### ROOM RATE

The rate is \$159.00 plus \$10.00 resort fee for single or double occupancy, plus applicable tax.

### ROOM BLOCK DATES

A room block has been reserved for the nights of September 30 and October 1

### RATE AVAILABLE UNTIL

Make your reservations prior to September 11, 2015. There are a limited number of rooms available at the conference rate. Please make your reservations early.

### ADDITIONAL INFORMATION

The Westin Orlando Universal Boulevard is the area's ideal Orlando Convention Center hotel. Ideally located near many Orlando attractions, restaurants, and world-class shopping venues, this Orlando luxury hotel features 315 guest rooms, including one- and two-bedroom suites. All guest rooms with a king bed and one-bedroom suites are furnished with kitchenettes while all two-bedroom suites have full kitchens.

### TRANSPORTATION

Westin Orlando Universal Blvd is located approximately 12 miles from Orlando International Airport (MCO).

SuperShuttle offers a shared ride from MCO to the Westin Orlando. Fare is \$18 one-way or \$36 roundtrip. Their website is [www.supershuttle.com](http://www.supershuttle.com) and their phone number is 800-258-3826.

Taxi: Approximately \$40 - \$45 one way





PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

## PRICING (CIRCLE ONE)

**Your registration fee includes:** Full access to all conference sessions and materials, breakfast, lunch, and access to the networking reception on Thursday, breakfast and lunch on Friday, as well as refreshments and snacks throughout the conference.

BEST VALUE	CONFERENCE	WITH AI PRO MEMBERSHIP
Conference + Digital Book - How to Engage Faculty in Academic Program Prioritization	Conference only	Get \$100 OFF with your AI Pro Membership
\$1570	\$1495	<a href="#">Learn More</a> \$100 OFF

### EARLY BIRD PRICING

Postmarked on or before September 11, 2015. After September 11, 2015, an additional \$100 fee per registrant applies.

[REGISTER ONLINE](#) or on the next page.



PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

## CONFERENCE REGISTRATION INFORMATION

Print Name | Job Title

Institution/Organization

What name do you prefer on your name badge? | Address

City | State/Province | Zip/Postal Code | Country

Telephone | Email

**IF THIS CONFERENCE PARTICIPANT HAS ANY DIETARY OR ACCESSIBILITY NEEDS, PLEASE LIST THEM IN THE SPACE BELOW. WE WILL DO OUR BEST TO ACCOMMODATE THESE NEEDS.**

Empty space for dietary or accessibility needs.

How did you hear about this event? (email from AI, ACPA, colleague forwarded email, *The Chronicle*, etc.) \_\_\_\_\_

## ADDITIONAL CONTACT INFORMATION

If you would like us to send a copy of your registration confirmation or receipt to someone else, please complete this section

Additional Contact Name | Contact Phone

Additional Contact Email | Additional Contact Title

## EMERGENCY CONTACT INFORMATION

Emergency Contact Name | Emergency Contact Phone



**PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259**

## 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

## CREDIT CARD



Name on Card

Account Number

Billing Address

Billing City

Billing State

Billing Zip Code/Postal Code

Exp. Date

Security Code (last 3 digits on the back of Visa and MC or 4 digits on front of AmEx)

**AMOUNT TO CHARGE:** \_\_\_\_\_

## CHECK/INVOICE

- My check is included and covers \_\_\_\_\_ registration(s) Check # \_\_\_\_\_
- Please invoice me, Purchase Order # \_\_\_\_\_ (PO # not required to receive invoice)

## HIGHER ED IMPACT

Delivered free to your inbox, Higher Ed Impact provides you with a full tool kit to help you monitor and assess the trends and strategic challenges likely to have an impact on your institution's health and competitiveness. (Check the boxes for the editions you would like to sign up for)

- DAILY PULSE** - Scan current events, timely research, and notable practices at other institutions.
- WEEKLY SCAN** - Review the week's most significant events and the most timely research in higher education, with key takeaways suggested by higher education's leading experts.
- DIAGNOSTIC** - Get an enterprise-wide and in-depth look at a current, strategic challenge; identify steps to take and critical questions to address.

List the names of the registrants you'd like to sign up: \_\_\_\_\_

Learn more or sign up to receive Higher Ed Impact at: [www.academicimpressions.com/news-sign-up](http://www.academicimpressions.com/news-sign-up)

*\*Note if you do not provide any names in the above space, all attendees will be signed up for the options selected.*



## CANCELLATION AND REFUND POLICIES

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### SATISFACTION PROMISE

We want you to be satisfied with your Academic Impressions learning experience. If the program you purchased fails to meet your expectations, please contact us within 30 days and let us know. We'll credit the full amount you paid toward another AI program that may better fit your needs.

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### CONFERENCES

For in-person conferences, substitute registrants are welcome and may be named free of charge at any time. If you cancel 8 weeks or more prior to the first date of the conference, you will receive a full refund, less a \$100.00 service charge per attendee.

If you cancel within 8 weeks of the first date of the conference, you are not entitled to a refund. However, as a courtesy, we will allow you to apply your payment, less the service charge, toward a future purchase within one year from the date you cancel. Your payment is transferable to another person from your institution if you wish.

Please note that if you do not attend and you do not contact us in advance to cancel as described above, you are responsible for the entire payment. In case this event is cancelled, Academic Impressions' liability is limited to a refund of the registration fee only.

### ONLINE TRAININGS CONSISTING OF AT LEAST ONE LIVE TRAINING DATE

You will receive a full refund (less a \$75 service charge) if you cancel 8 weeks or more prior to the first live training date. If you cancel within 8 weeks of the first live training date, you are not entitled to a refund. But as a courtesy, we will apply your payment (less a \$75 service charge) towards a future purchase within one year from the date you cancel. Your payment is transferable to another person from your institution if you wish. You may name a substitute primary participant free of charge at any time prior to the first live training date. If available, you may switch the live training format to a self-paced format (such as a CD-ROM Recording or On-Demand Download) free of charge. (Shipping charges will apply to CD-ROM Recording orders outside the U.S. or Canada.)

### ONLINE TRAININGS WHICH ARE PURELY SELF-PACED

All sales are final. No cancellations or refunds are provided.

### RECORDINGS, ON-DEMAND DOWNLOADS, MONOGRAPHS AND OTHER PUBLICATIONS

All sales are final. No cancellations or refunds provided.