



CONFERENCE

PRACTICAL TOOLS FOR REALLOCATING RESOURCES

October 3 - 4, 2016

Philadelphia, PA





Successfully navigate the complex task of reallocating resources at your institution.

OVERVIEW

Years of budget cuts and declining enrollments have left many institutions without the resources they need to grow. While reallocating existing resources is the most likely source of new funds, doing so is not an easy task.

Using the Dickeson model for prioritizing programs, you will learn proven and practical models for reallocating resources. We will walk you through the nuts and bolts of how to reallocate resources, including strategies for managing the politics and pushback such efforts inevitably confront.

PROGRAM FORMAT AND RESOURCES

This program will be highly interactive and discussion-based. While the concepts of reallocation have been successfully used in many campus settings, there is no one template for successful implementation. A variety of cultural and economic factors will influence an institution's approach. As such, this program will focus on the application of these concepts to your specific campus context.

RESOURCES

In working with dozens of institutions over the last ten years on this issue of reallocation, our expert presenters have compiled dozens of valuable resources-- guiding documents, sample templates, rubrics, decision making guides, etc.-- and they have generously shared all of these resources in your conference materials. These resources can be an important and valuable way to accelerate your efforts.

[VISIT EVENT PAGE](#)

<https://www.academicimpressions.com/conference/practical-tools-reallocating-resources>



BRING YOUR TEAM

Given the leadership support required to successfully implement such an effort, we have designed this program for teams of institutional executives. We strongly encourage both the chief financial officer and chief academic officer to attend the program together. If your institution is early in the process of considering whether and how to reallocate resources, we encourage your institution's president to attend as part of your team.

Meaningfully reallocating resources also requires strong faculty participation so we encourage faculty leaders to attend as part of the larger team. Our approach is a data-intensive effort and requires significant support from the IR office; as such, we encourage representatives from institutional research to attend as well.

LEARNING OUTCOME

After participating in this conference, you will be able to reallocate resources at your institution using the Dickeson model for prioritizing programs.

CONTACT US FOR MORE INFORMATION

Contact Amit Mrig, President and CEO at Amit@academicimpressions.com or 720-988-1210 if you'd like additional information about the program.



AGENDA

MONDAY, OCTOBER 3, 2016

8:00 - 8:30 a.m.

Registration

8:30 - 9:00 a.m.

Welcome, Introductions, and Program Overview

9:00 - 10:15 a.m.

Checking for Institutional Readiness

Multiple institutions have tried and failed at meaningful reallocation of resources. Many more have succeeded. What separates one group from the other? Our opening session will uncover the keys to success and, using two separate assessments, will give you a clear sense as to your readiness to undertake such an effort.

10:15 - 10:30 a.m.

Break

10:30 - 11:30 a.m.

Confronting Likely Barriers

You will inevitably encounter resistance from multiple groups—faculty, union members (if applicable), and even staff and administration. In this session, we'll identify the various stakeholders you need to engage, common areas of pushback, and strategies to work with, not against, these important groups.

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

Getting Started- The Seven Keys to Success

To be successful, you must approach the effort intentionally and in stages. Rushing one step or skipping another can alienate stakeholders and derail your effort. In this session, we'll walk you through a comprehensive yet practical model for approaching reallocation.

12:15 - 1:15 p.m.

Lunch (included in registration fee)

1:15 - 2:30 p.m.

Defining Programs and Allocating Costs

Defining programs and allocating costs is key to ensuring fair and credible results, but there are layers of complexities involved—especially when faculty and other resources are shared across programs. In this session, we'll discuss the best unit of analysis and how to allocate costs across programs, even if one academic or administrative department supports multiple programs.

2:30 - 2:45 p.m.

Break

2:45 - 3:45 p.m.

Essential Elements of Inclusive and Transparent Processes

Most efforts to reallocate resources are derailed due to process issues dealing with people and politics. Transparency is both essential and not without its risks. In this session, we'll explore proven ways to manage a process that is fair, transparent, and has integrity to both the end goals and the people involved.



AGENDA

MONDAY, OCTOBER 3, 2016 (CONTINUED)

3:45 - 4:30 p.m.

Selecting Appropriate Criteria

Using criteria that are clear to everyone, are comprehensive in nature, and are focused on the long-term interests of the institution and its people is critical to gaining buy-in and support. In this session, we'll explore two sets of criteria that other institutions have used to understand both academic and administrative program performance.

4:30 - 5:30 p.m.

Networking Reception (included in registration fee)

TUESDAY, OCTOBER 4, 2016

8:00 - 8:30 a.m.

Continental Breakfast (included in registration fee)

8:30 - 9:00 a.m.

Day 1 Review and Q&A

9:00 - 10:15 a.m.

Weighting the Criteria

Just as programs hold varying values 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.

10:15 - 10:30 a.m.

Break

10:30 - 11:00 a.m.

Where do you Find the Data?

Ensuring that your process is data-driven is both prudent from a financial and management perspective, and can also quell rumors of hidden agendas and politics. The challenge is that at the same time there is seemingly not enough and too much data. What data, both internal and external to the institution, should be used when comparing programs?

11:00 - 11:45 a.m.

Strategic Planning and Resource Re-allocation: Which Comes First?

The need to reallocate resources is usually related to a strategic plan as most plans are additive and don't offer many details on where the new resources will come from. Should you conduct a reallocation before a planning process so you know the financial capabilities and constraints for the plan, or should you do it afterwards once you've identified the strategic priorities for the institution? There are pros and cons to both approaches, and we'll explore the differing rationales for selecting one versus the other.

11:45 a.m. - 1:00 p.m.

Lunch (included in registration fee)

1:00 - 2:00 p.m.

Knotty Issues to Consider

At every institution there will be politically contentious issues to deal with, including how to handle the general education or core curriculum, intercollegiate athletics, and even legacy policies and procedures. These issues are divisive because there are multiple complexities and nuances involved; we'll tackle the tough issues in this session and offer clear decision points for your institution on how to proceed.



AGENDA

TUESDAY, OCTOBER 4, 2016 (CONTINUED)

2:00 - 2:30 p.m.

Implementation Considerations

Successful implementation is key to ensuring that this effort 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 of reallocation decisions.

2:30 - 2:45 p.m.

Break

2:45 - 3:30 p.m.

Using the Reallocation Process to Create Workable Program Plans

Investing in a process like this reveals multiple opportunities for all programs—whether deemed high performing or not—to improve, streamline inefficiencies, and seize untapped opportunities. In this session, we'll walk through how this happens and share sample templates and plans from other institutions.

3:30 - 4:00 p.m.

Action Planning

In our final session, 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.



INSTRUCTORS

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.

TESTIMONIALS

"Focused and timely. The presenters were very knowledgeable and led the participants through the material at an acceptable pace. I would recommend this session to my colleagues."

- Nick Santilli, AAVP for Planning Assessment & Institutional Effectiveness, John Carroll University

The Academic Impressions event featured excellent instructors who exhibited both content knowledge and deep personal and professional expertise. It challenged participants not only to confront issues, but also to work with other participants to arrive at solutions.

- Dr. Bobby Hall Executive Vice President and Provost Wayland Baptist University

The conference was thought-provoking, informative, and generously peppered with practical advice and "real-life" examples. I feel equipped to successfully embark upon the prioritization process.

- Debra Thatcher Provost and Vice President, Academic Affairs SUNY Cobleskill

"Bringing a team of faculty and administrative staff to the workshop was invaluable as we launch the prioritization process in the coming weeks. Our team worked together throughout the two days to share ideas, develop next steps and prepare a strategy for involving faculty in the process from inception to conclusion. Our time was well spent!"

- Nancy Blattner, President, Caldwell College



OTHERS	VS	ACADEMIC IMPRESSIONS
Typically large annual event		Intimate, workshop-style event with personalized attention
Many concurrent sessions; forcing choice		One focused learning track
Uneven sessions and less outcome-focused, driven by an open call for proposals		Needs-driven and meticulously planned with practical outcomes <ul style="list-style-type: none"> Action plans and next steps to use upon returning to campus Carefully-vetted expert instructors that are also practitioners in the field
Lecture-based		Learner-centric and designed for interaction and collaboration
Large networking events with vendors		Small-scale opportunity to truly connect with colleagues in the same position at other institutions
Some slide presentations posted online after the event		200+ page workbooks with references, worksheets, articles, templates, exercises, and planning documents

96%
of past attendees would recommend an AI conference to a colleague

250+
and growing of AI member institutions (AI Pro)

15,000+
higher ed professionals served

AI Conference Experiences

Academic Impressions provides valuable exploration of timely and pragmatic challenges to higher education institutions. The combination of impassioned subject matter experts as presenters and means of engaging conference attendees was potent.

- C. Tennent, Associate VP of Facilities Management, University of Saskatchewan

This conference was the complete package: relevant topics, philosophical and practical applications, fantastic speakers, fantastic location. One of the BEST conferences I've ever attended. It is what a conference should be! Full of collaboration, networking and solutions.

- M. Lowe, Associate Professor and General Reference Librarian University of Louisiana at Monroe



LOCATION

October 3 - 4, 2016 :: Philadelphia, PA

HOTEL:

Hilton Philadelphia at Penn's Landing
201 S. Columbus Blvd
Philadelphia, PA 19106

To reserve your room, please call 215.521.6500. Please indicate that you are with the Academic Impressions group to receive the group rate.

ROOM RATE:

The rate is \$190 for single or double occupancy, plus applicable tax.

ROOM BLOCK DATES:

A room block has been reserved for the nights of October 2 and 3, 2016.

RATE AVAILABLE UNTIL:

Make your reservations prior to September 2, 2016. There are a limited number of rooms available at the conference rate. Please make your reservations early. Rooms are subject to hotel availability.

ADDITIONAL INFORMATION:

Enjoy the beautiful waterfront of Philadelphia at the Hilton Philadelphia at Penn's Landing. The hotel is the only waterfront property in the area and features world class dining outlets, stylish event venues, spacious and comfortable accommodations, all coupled with impeccable service.

TRANSPORTATION:

The hotel is approximately 10 miles from Philadelphia International Airport (PHL).

SEPTA (Southeastern Pennsylvania Transportation Authority) - The stop at 2nd and Market Streets on the Blue Line is the closest stop to the Hilton Philadelphia at Penn's Landing. It's about a 10 - 15 minute walk from the hotel.



PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

PRICING (CIRCLE ONE)

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

Bring your team!

For every two people you register from your institution, receive a third registration at 50% off of the registration price.

BEST VALUE	CONFERENCE	WITH AI PRO MEMBERSHIP
Conference + Book - <i>How to Engage Faculty in Academic Program Prioritization</i>	Practical Tools for Reallocating Resources	Get \$100 OFF With Qualifying AI Pro Memberships Learn More
\$1,570	\$1,495	\$100 OFF

EARLY BIRD PRICING

Postmarked on or before September 16, 2016. For registrations postmarked after September 16, 2016, 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.

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

**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



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.

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.