



CONFERENCE

BUDGETING FOR INNOVATION

November 9 - 10, 2017

San Antonio, TX



ACADEMIC
IMPRESSIONS



Develop a budgeting process for innovation on your campus that is transparent and successful.

OVERVIEW

Learn how you can ensure that your budgeting process is transparent to the entire campus community, aligned with your strategic priorities, and enables your institution to support innovative and new ideas. During this training we will discuss how to improve your budgeting process so that you can seize the opportunities that exist for your institution. You will leave this training better able to:

- Create a transparent budget task force and approval process
- Support your proposal process to get better ideas on the table
- Strategically allocate resources to drive institutional and departmental initiatives
- Communicate resourcing decisions to executive leadership and trustees
- Prepare for unexpected projects and expenses that are not tied to your strategic plan

We have made this event interactive to ensure that you can apply what you learn when you return to your campus. A hands-on project will be included to illustrate processes that you can adapt and you will be given time to work through challenges that are unique to your institution.

ADDITIONAL BUDGETING RESOURCES

Included in your registration is a workbook that contains a number of resources that our experts have designed to help you better budget for innovation on your campus. This workbook includes:

- Budgeting and strategic alignment templates
- Adaptable budgeting process framework
- Campus engagement strategies throughout the process

[VISIT EVENT PAGE](#)

www.academicimpressions.com/conference/budgeting-innovation



BRING YOUR TEAM

This event is designed for senior academic and financial leadership who are highly motivated to re-think their budgeting process. As such, we recommend attending as a team that includes both financial and academic leadership from your institution. Joining as a team will allow you to develop a shared vision of how you can take your innovative ideas and develop a strategic budgeting process to achieve them. When you register two people from your institution, a third can attend for 50% off!

LEARNING OUTCOME

After participating in this conference, you will be able to customize a process for budgeting for innovation on your campus.

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.

CPE CREDITS

Recommended CPE Credits: 13.5 for the main conference and the post-conference workshop

Program Field of Study: Management Advisory Services

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, Suite 700, Nashville, TN, 37219-2417. Website: www.nasba.org



AGENDA

THURSDAY, NOVEMBER 9, 2017

8:30 - 9:00 a.m.

Breakfast (included in your registration)

9:00 - 9:30 a.m.

Opening Remarks and Introductions

9:30 - 10:30 a.m.

Budgeting for Innovation in Context

Our opening session will address the broader context of planning as it relates to the strategic plan and resource allocation. You will hear from our instructors who will lay the foundation for the next day and a half. You will also receive an orientation to the resources that are included in the program workbook so you can get the most from this event.

10:30 - 10:45 a.m.

Break

10:45 a.m. - 12:00 p.m.

Empowering Your Budget Task Force

Your functional and healthy budget task force is the foundation of a strategic budgeting process. Creating a structure that fosters a culture of high-trust and level of responsibility for each member can lead to faster and more informed decision-making. This session will provide you an example of a budget task force charter and the full process that you can adapt.

In this session, you will work together to:

- Explore the organizational structure of the task force
- Discuss who should be at the table and potential role-specific strengths
- Adapt a budget task force charter for your institution or an example
- Define the functions and limits of a sample task force charter
- Work through real-to-life challenges you will face

12:00 - 1:00 p.m.

Lunch (included in your registration)

1:00 - 2:00 p.m.

Project Proposal Resources and Steering Documents

Now that you have the framework for the guidelines and objectives of the budget task force committee, the next step is to provide resources to support the proposal process. You will learn how to build efficiencies into this process by incorporating strategic plan metrics, aspects of the campus climate, trustee and presidential priorities, and a financial and market analysis to support the business case.

2:00 - 3:00 p.m.

Preparation for Contingencies

You may have unexpected projects or expenses that you didn't budget for or are not tied directly to your strategic plan. This session will provide more details on how to support innovation in the immediate future and maintain a balanced, transparent budget process with built-in agility to prepare for off-strategic-plan budgeting.

3:00 - 3:15 p.m.

Break



AGENDA

THURSDAY, NOVEMBER 9, 2017 (CONTINUED)

3:15 - 4:30 p.m.

Prioritization at the Unit and Branch Level

You will learn how different campuses approach prioritization process within their department and explore multiple real-life perspectives. You will also learn key strategies and considerations for a successful prioritization process.

4:30 p.m. - 5:30 p.m.

Networking Reception (included in your registration)

DAY 2, FRIDAY, NOVEMBER 3, 2017

8:30 - 9:00 a.m.

Breakfast (included in your registration)

9:00 - 9:30 a.m.

Q&A

We'll provide some time for questions and answers to any remaining questions from the previous day.

9:30 - 10:30 a.m.

Sample Budgeting Process—An Innovative Approach

You will learn how one institution used their budgeting process to operate in a transparent manner, ensure appropriate collaboration, align resource allocation with priorities established in the strategic plan and operationalized the strategic plan based on an appropriate assessment process.

10:30 - 10:45 a.m.

Break

10:45 a.m. - 12:00 p.m.

Case Study Wrap-Up and Final Q&A

You will work with your teams to finalize your conclusions from the working sessions from the previous day. Each team will present on their decisions and expected outcomes with time for feedback from your peers. Structure will be provided to support your ideas and incorporating them into your own budget process on your campus.

Post Conference Workshop: Rethinking the Business Model on your Campus

12:00 - 1:00 p.m.

Lunch for Post-conference Workshop Attendees (included in workshop registration fee)

1:00 - 4:00 p.m.

Post Conference Workshop: Rethinking the Business Model on your Campus

In this afternoon workshop, you will experience a dynamic planning exercise that you can take back to your board, cabinet, planning committee and other key groups to foster innovative thinking that will shape and sharpen your business model. The activity enables you to bring more voices into the conversation but to do so around a common framework, to both generate and evaluate new ideas. You will learn how to align mission, the value it generates, cost, and revenue, as well as explore a variety of other factors that can enhance or detract from your model's long-term sustainability. In the workshop you'll walk through real case examples as well as create an iteration for your own campus.



INSTRUCTORS

Robert Brodnick, Ph.D., Principal, Strategic Initiatives & Founder, Brodnick Consulting Group

Rob has worked in the fields of planning, strategy, research, and organizational change and development for over twenty-five years. Rob is an expert facilitator of human process from dyads, to small groups, to large scale retreats and has notable experience with leadership groups, boards, planning bodies, and with strategic and creative solutions.

Rob has served three universities over the past twenty-five years and his work has focused on building institutional capacity and effectiveness through strategy, planning, and innovation. He has direct experience with academic planning, institutional effectiveness, assessment and program review, institutional accreditation, enrollment management to include retention, admissions, financial aid and registrar functions, and sustainability.

Now, as a strategy and innovation consultant, Rob works with clients across many industries but still maintains a core higher education practice. He holds a Ph.D. in Psychoeducational Processes from Temple University. Rob teaches courses in education, the social sciences, and business. He has special interest in design-thinking and innovation management and is a widely regarded speaker and practitioner on those topics.

Larry Goldstein, President, Campus Strategies, LLC

Larry serves as the head 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.

Steven Kreidler, Vice President for Administration & Finance, Metropolitan State University of Denver

Formerly the Executive Vice President for the University of Central Oklahoma, Steve joined MSU Denver in August of 2013. His prior career was in economic development, non-profit management, and fund raising.

His current responsibilities include budget and finance, accounting and audit, talent management, facilities, grants and contracts, extended campus, project management, process transformation, and institutional research. On an interim basis, Steve has been responsible for the MSU Denver Foundation, the MSU Alumni Association, and Athletics.

Donald M. Norris, President, Strategic Initiatives, Inc.

Don has over 40 years of experience as a thought leader and expert practitioner in leading and navigating change, crafting and executing strategy, and improving performance and productivity. Following an administrative career at the University of Michigan, University of Texas and University of Houston, he founded Strategic Initiatives, Inc. and has counseled over 100 institutions on strategy and organizational transformation. He co-authored a series of highly influential books for the Society for College and University Planning (SCUP) including *Transforming Higher Education* (1995), *A Guide to Planning for Change* (2009), and *Transforming in an Age of Disruptive Change* (2013). He also co-authored *The Business Value Web* (2009) for the National Association of College and University Business Officers (NACUBO) and served as faculty for nearly 10 years on WACUBO's Business Management Institute. Dr. Norris and Dr. Brodnick's latest work is focusing on business model innovation in higher education is reflected in the ground breaking article, "New Models in the Making" in NACUBO's The Business Officer (July/Aug 2017).



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 campusCarefully-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

November 9 - 10, 2017 :: San Antonio, TX

HOTEL:

Grand Hyatt San Antonio
600 East Market Street
San Antonio, TX 78205

To reserve your room, please call 210.224.1234. Please indicate that you are with the Academic Impressions group to receive the group rate.

ROOM RATE:

The rate is \$180 for single or double occupancy, plus applicable tax.

ROOM BLOCK DATES:

A room block has been reserved for the nights of November 8 and 9, 2017.

RATE AVAILABLE UNTIL:

Make your reservations prior to October 18, 2017. 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:

Set along the spectacular River Walk, Grand Hyatt San Antonio is located near downtown restaurants, sites and attractions that make San Antonio one of the most culturally rich cities in the country.

TRANSPORTATION:

Grand Hyatt San Antonio is located 8 miles from San Antonio International Airport (SAT).

Taxi: Approximately \$35 (one way) Fares may vary

Uber: \$22 (one way) Fares may vary



PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

PRICING (CIRCLE ONE)

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

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Bring your team!

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

A \$500.00 surcharge applies to registrants from corporations.

BEST VALUE	CONFERENCE ONLY	WORKSHOP ONLY	WITH AI PRO MEMBERSHIP
Conference + Post-Conference Workshop	Budgeting for Innovation	Post Conference Workshop: Rethinking the Business Model on your Campus	Get \$100 OFF With Qualifying AI Pro Memberships Learn More
\$1,595	\$1,295	\$395	\$100 OFF

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EARLY BIRD PRICING

Postmarked on or before October 20, 2017. For registrations postmarked after October 20, 2017, an additional \$100 fee per registrant applies.

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[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.