



CONFERENCE

# MEASURING ACADEMIC PROGRAM COST AND DEMAND FOR IMPROVED RESOURCE ALLOCATION

July 17 - 19, 2017  
San Diego, CA



**AD ASTRA**  
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**ai** **ACADEMIC**  
IMPRESSIONS



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*Gain a clear vision of the academic programs that are economic engines.*

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## OVERVIEW

Gain the tools and skills you need to analyze academic program cost and demand. During this three-day training, you will learn the basis for building your own cost and demand model so you can better:

- Determine methods to calculate contribution margin for programs and departments
- Manage scheduling efficiencies to maximize program impact
- Measure external demand for new and existing academic programs
- Graphically organize data to effectively communicate information to a variety of audiences
- Consider benchmarking data and ways to incorporate it in your analysis

With these data and calculations in-hand, you will be able to have more productive conversations about where and how best to allocate limited academic resources.

## ROOTED IN PRACTICE: BRING YOUR DATA AND YOUR LAPTOP

This conference is an active learning opportunity for you and your colleagues. You will focus on the process of actually making cost and demand calculations and examine how you can use that data to inform and communicate strategic decisions.

Upon registration for this program you will be asked to complete a survey so we can learn more about your specific questions and needs. You will also be provided a template to complete with your institutional data that will help you contextualize the concepts and working session activities.

## PRE-CONFERENCE WORKSHOP: MANAGING YOUR ACADEMIC PORTFOLIO IN A DECENTRALIZED BUDGET MODEL

This pre-conference workshop is designed for institutions and deans who are new to or will be shifting to a decentralized budget model. This is your opportunity to get your decentralized budget questions answered and ensure that you are comfortable with your model as you enter the program analysis process.

[VISIT EVENT PAGE](#)

[www.academicimpressions.com/conference/measuring-academic-program-cost-and-demand-improved-resource-allocation-july-2017](http://www.academicimpressions.com/conference/measuring-academic-program-cost-and-demand-improved-resource-allocation-july-2017)



## IS THIS TRAINING RIGHT FOR ME?

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This training is designed for academic program leaders, financial analysts, business officers, and institutional researchers. This training is ideal if you are in the early stages of determining your program costs or want to understand how new programs impact your campus and need help building your own model as both a learning exercise and a tangible resource for your institution. If any of the latter are true for you, this training is an opportunity for you to get a detailed and hands-on experience in those categories.

**When you register two people from your institution, a third can attend for 50% off!**

If you have questions concerning the level of difficulty that you can expect from this program, please contact Grace Spivak at [grace@academicimpressions.com](mailto:grace@academicimpressions.com) or by phone at 720-988-1233.

## LEARNING OUTCOME

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After participating in this conference, you will be able to better inform your institution's approaches to academic program cost and demand analysis.



## AGENDA

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MONDAY, JULY 17, 2017

### Pre-Conference Workshop: Managing Your Academic Portfolio in a Decentralized Budget Model

8:00 - 8:30 a.m.

**Registration for Pre-Conference Workshop**

8:30 - 9:00 a.m.

**Continental Breakfast for Pre-Conference Workshop Attendees (included in workshop registration fee)**

9:00 a.m. - 12:30 p.m.

#### **Pre-Conference Workshop: Managing Your Academic Portfolio in a Decentralized Budget Model**

This pre-conference workshop is designed for institutions and deans who are new to or will be shifting to a decentralized budget model. This workshop will help you get your decentralized budget questions answered and ensure that you are comfortable with your model as you enter the program analysis process. We will discuss how you can make important business decisions related to your academic programs and transparently communicate those decisions to stakeholders. Excel templates and spreadsheets will be provided to help you in your effort.

12:30 - 1:30 p.m.

**Lunch for Pre-Conference Workshop Attendees (included in workshop registration)**

### Main Conference

1:00 - 1:30 p.m.

**Registration**

1:30 - 2:00 p.m.

#### **Opening Remarks and Introductions**

To gain a foundation for the rest of the training, you and your colleagues will begin by introducing yourselves and charting your challenges and questions related to program cost and demand analysis.

2:00 - 3:30 p.m.

#### **Modeling Academic Program Costs: Methodologies, Key Variables, and Formulas**

Calculating program costs is the first step in a comprehensive program analysis model. During this session, you will be introduced to various methods you can use to calculate academic program costs. We will focus on accounting for cross-listed courses, multiple locations, shared faculty, and common nuances that can complicate this calculation. You will leave with a better idea of which costing method is the best option for your unique institutional context.

3:30 - 3:45 p.m.

**Break**

3:45 - 4:30 p.m.

#### **Working Session: Building Your Own Prototype Cost Model**

Now that you have a foundational understanding of the costing model that will work best for your institution, you will have structured working time to begin building your prototype in Excel. Using your own institutional data or sample data that we provide, you will work to build this prototype with the guidance of our expert instructors and your peers.



## AGENDA

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### MONDAY, JULY 17, 2017 (CONTINUED)

4:30 - 5:00 p.m.

**Discussion: Sharing Progress on Your Model**

After spending time working on your prototype we will discuss successes and challenges as a group. This will be a great opportunity to hear from your peers and gain clarity from our experts on your prototype cost model.

5:00 - 6:00 p.m.

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

### TUESDAY, JULY 18, 2017

8:00 - 8:30 a.m.

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

8:30 - 9:00 a.m.

**Day One Recap**

9:00 - 10:15 a.m.

**Internal Demand Analysis: Smart Operational Decisions to Optimize Internal Economies**

We will begin Day Two by shifting our attention to analyze the internal demand of your academic programs. You will hear a case study highlighting how one institution was able to significantly save by responding more efficiently to their current students' needs. You will also be introduced to resources that can help you analyze space and scheduling in a way that can flexibly respond to internal demand for programs.

10:15 - 10:30 a.m.

**Break**

10:30 - 11:00 a.m.

**Working Session: Internal Demand Analysis**

After reviewing helpful concepts and tools for measuring internal demand for academic programs, you will have a chance to use the tools discussed. In this session you will have the opportunity to analyze the internal demand for academic programs and their corresponding impact on program costs.

11:00 a.m. - 12:30 p.m.

**Collecting and Reporting on External Demand**

Conducting an external demand analysis is a critical part of projecting enrollment and revenue for your new or existing academic program. Through case studies of program pro formas, you will learn how to calculate and communicate external demand data to campus stakeholders. You will have working time during this session to begin applying the information you learn to your own campus context.

12:30 - 1:30 p.m.

**Lunch (included in registration fee)**

1:30 - 2:30 p.m.

**Facing Tensions Between Cost and Demand Analysis**

Cost and demand analysis is part of a larger conversation related to systemic pressures at all levels. This guided discussion will provide a framework within which you can examine some of those internal and external pressures related to your cost unit and the larger organization and provide opportunities to discuss these shared challenges with your peers.

2:30 - 2:45 p.m.

**Break**



## AGENDA

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### TUESDAY, JULY 18, 2017 (CONTINUED)

2:45 - 3:45 p.m.

**Incorporating External Benchmarking Data to Complete the Equation**

Benchmarking against peer and aspirational institutions can be a strategic tool when making academic program decisions. In this session, you will learn how to apply benchmarking in a way that takes your academic program analysis beyond your own institutional context. Specifically, we will talk about how to identify your benchmarking institutions, read comparative data, and make decisions based upon the trends you see. We will also discuss the limitations and other considerations for benchmarking data.

3:45 - 4:30 p.m.

**Working Time: Incorporating Demand and Benchmarking into your Model**

After hearing best practices in benchmarking against other institutions, you will have a chance to incorporate what you learned into your own model. During this working session, you will review the key points of the day and develop a plan for benchmarking your programs and adding that information into your overall program analysis.

4:30 - 5:00 p.m.

**Balanced Scorecard for External Program Demand (Demonstration)**

In our final session of Day Two, we will dive deeper into external market demand and provide you with the chance to preview a balanced scorecard approach using the latest technology. If you are considering subscribing to a data services provider or curious about what such a subscription entails, this session will be extremely beneficial in making that decision. You will leave with resources and reports regarding market trends.

### WEDNESDAY, JULY 19, 2017

8:30 - 9:00 a.m.

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

9:00 - 9:30 a.m.

**Peer Discussion: Challenges with Communicating Cost and Demand Analysis**

Communicating your program cost and demand analysis can be a difficult process. During this discussion we will talk about the wide variety of challenges and roadblocks that you may face so that you are prepared to handle them as they arise.

9:30 - 10:30 a.m.

**Effectively Communicating Cost and Demand Data to a Variety of Audiences**

After discussing the challenges you may face, you need to will learn effective ways to communicate cost and demand data to various stakeholders. This session will address what distinct messages are needed for different audiences and how you can display the information to effectively communicate your data.

10:30 - 10:45 a.m.

**Break**

10:45 - 11:45 a.m.

**Putting it All Together: Presenting your Analysis to Peer Groups**

In our final session, you will practice presenting your program analysis work in a safe space. Using peer groups, you will have the opportunity to present your analysis and receive feedback. The feedback you receive will be invaluable as you work to present the information to your institutional stakeholders.

11:45 a.m. - 12:00 p.m.

**Closing Remarks**





## INSTRUCTORS

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**Bob Atkins, CEO and Founder, Gray Associates**

Bob led Gray's entry into the education industry and the development of Gray's proprietary industry databases and service offerings. He has worked with all of Gray's education clients, consulting Presidents, CEOs, and CMOs on business strategy, pricing, location selection, and program strategy. He is an expert in business strategy, marketing, sales and high-tech distribution channels. He has helped AT&T, Avaya, American Express, Dex Media, Qwest Communications, HP, IBM, and other clients to develop growth strategies, enter new markets, and build their sales and channel organizations. He has also led efforts that have eliminated tens of millions of dollars in cost, particularly in sales and channel management. He is a published author, whose articles have appeared in the Wall Street Journal, Sales and Marketing Management, and other publications around the world. He received an MBA, with honors, from Harvard Business School and a BA, magna cum laude, from Harvard College.

**William Crawley, Ed.D., Dean, College of Education and Professional Studies, University of West Florida**

As dean, Dr. Crawley is charged with sustaining the welfare of the college by supporting academic programming, student support, faculty and staff supervision and development, personnel evaluation, college-based research/grant initiatives, community engagement, accreditation, strategic planning and assessment, alumni relations, and college advancement.

Dr. Crawley has held administrative roles and consulting positions at both public and private universities, and his experience includes conducting program market cost and demand analysis, developing operational efficiencies, and onboarding various budgeting models (centralized, RCM and hybrids) to serve organizational units embedded within larger institutions (e.g., colleges within universities). Such work requires an understanding of issues related to developing budgetary cost-centers, and an appreciation for how such operations will impact the larger organization. As a result of these efforts—in combination with strategic enrollment, collaborative grantsmanship, contracted services, and fundraising the organizations—he has successfully advanced various entrepreneurial and community-oriented initiatives while simultaneously generating significant annual funding for the organizations he has lead.

**Tony L. Honeycutt, Ed.D., Provost, Somerset Community College**

As Provost of Somerset Community College, Tony L. Honeycutt serves as the Chief Academic Officer for the college and is responsible for oversight of the daily operations of the college and for leadership of the college in the absence of the College President. Dr. Honeycutt is primarily responsible for providing leadership to Academic Affairs, Student Affairs and other units that support instructional activities. His educational career began as an instructor at Mississippi Delta Community College in Moorhead, Mississippi. During his time at Somerset, Dr. Honeycutt has overseen a 48 percent increase in credit hours per student. Somerset managed to accomplish this while also serving more students and saving \$3.4 million in additional expenses.

With nearly 10,000 students, SCC is part of the Kentucky Community and Technical College System, Kentucky's largest provider of postsecondary education and workforce training. Honeycutt has been in education for more than 43 years, and at SCC for 11 years.



## INSTRUCTORS

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**Robert Allan Knight, B.A., M.B.A., Vice President, Finance and Operations, University of Northern British Columbia**

As Vice President, Robert Knight's portfolio includes finance, human resources, facilities, information technology, procurement, and security and safety for all students, faculty and staff of the University of Northern British Columbia in Prince George, British Columbia.

Robert has extensive experience in senior administration and finance roles at academic institutions. Before coming to UNBC in April 2016, Robert served as the principal administrative and financial officer for the Steinhardt School of Culture, Education, and Human Development at New York University, managing the central administrative operations of the school, including human resources, budget and finance, information technology, and space allocation and facilities.

Prior to going to NYU in 2010, he served as Associate Dean for Finance and Administration at Case Western Reserve University's School of Engineering and at its Weatherhead School of Management. He has also served as Assistant Vice Chancellor for Finance and Administration at the University of North Carolina at Chapel Hill, and Financial Planning and Budget Director at Oberlin College.

Robert holds a BA in Social Sciences from The Ohio State University and an MBA from Case Western Reserve University. He also earned a Certificate of Advanced Studies from the American Graduate School of International Management.

**Lisa Kopecky, M.B.A., Assistant Vice President for Academic Operations and Finance, California State University, Fullerton**

Ms. Kopecky is the Academic Affairs division manager for fiscal and facility resources for 150 departments serving more than 40,000 students at CSUF. She has had 25 years of education management experience—including strategic initiatives, planning and budgeting, analysis, academic operations, procurement, agreement oversight, facility planning, improvements and use, information security, and pay processing—since beginning her career with the Corporate Credit Union League of NY as Vice President/Director of Marketing for New England Savings Bank of CT and then Director of Academic Operations and Summer Session for Worcester Polytechnic Institute (WPI). She earned a bachelor's degree in marketing and communications from Bryant College and an M.B.A. from WPI. Her successes have included streamlining operations and access to financial information through design and implementation of workflow and online reporting tools; orchestrating the largest renovation and relocation project in CSUF history with more than 750 offices and 78,000 square feet involved; and planning for and providing direction to hundreds of classroom and facilities improvement projects, of varying size and complexity.





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

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July 17 - 19, 2017 :: San Diego, CA

### HOTEL:

San Diego Marriot Mission Valley  
8757 Rio San Diego Dr.  
San Diego, CA 92108

To reserve your room, please or call (619) 693-3800. Please indicate that you are with the Academic Impressions group to receive the group rate.

### ROOM RATE:

The rate is \$169 for single or double occupancy, plus applicable tax.

### ROOM BLOCK DATES:

A room block has been reserved for the nights of July 16, 17 and 18, 2017.

### RATE AVAILABLE UNTIL:

Make your reservations prior to June 26, 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:

Marriott hotel blends the luxuries of comfort and convenience with easy access to popular attractions including Old Town, Mission Bay, the Rio Vista Trolley, SeaWorld® San Diego, and Petco Park, home of the San Diego Padres. Immerse yourself in the energy of this Mission Valley hotel, featuring a unique blend of Spanish accents and tropical landscaping. Enjoy a host of amenities and services, from breathtaking balcony views and gourmet dining at DEN to the fully equipped fitness center and outdoor pool with a waterfall. Well-appointed guest rooms offer high-speed Internet and luxurious bedding.

### TRANSPORTATION:

The hotel is located 8 miles NE of San Diego International Airport

- Express Shuttle Service: \$12 (one way); reservation required
- Estimated Taxi Fare: \$22 (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, access to the networking reception on Monday, breakfast and lunch on Tuesday, and breakfast on Wednesday, 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	WORKSHOP	WITH AI PRO MEMBERSHIP
Conference + Pre-Conference Workshop	Conference Only	Pre-Conference Workshop only	Get \$100 OFF With Qualifying AI Pro Memberships
			<a href="#">Learn More</a>
\$1,595	\$1,295	\$395	\$100 OFF

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### EARLY BIRD PRICING

Postmarked on or before June 30, 2017. For registrations postmarked after June 30, 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](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.