MEASURING ACADEMIC PROGRAM COST AND DEMAND FOR IMPROVED RESOURCE ALLOCATION

December 6 - 8, 2017
Orlando, FL
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.
IS THIS TRAINING RIGHT FOR ME?

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 or by phone at 720-988-1233.

LEARNING OUTCOME

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

CPE CREDITS

Continuing education credits: CPE Credits
Continuing education credits: CPE
Recommended CPE Credits: 19.0
Program Field of Study: Specialized Knowledge and Applications
Delivery Method: Group-Live
Prerequisites: None
Program Level: Basic
AGENDA

WEDNESDAY, DECEMBER 6, 2017

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. You will also learn how one institution’s model evolved and the associated impact. Through a combination of presentations and discussions you will understand:

→ Benefits and challenges associated with RCM
→ Developing budgetary incentives for performance
→ Involving and educating your leadership team
→ Common implementation process steps
→ Institutionalizing the RCM mindset

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 - 1:45 p.m.
Opening Remarks and Introductions

1:45 - 2:30 p.m.
Peer Discussion: Current Challenges in Calculating Academic Program Cost and Demand
This will be a guided discussion to chart your challenges and questions related to program cost and demand analysis. The information will help inform ways we focus the working sessions during the event.

2:30 - 3:30 p.m.
Modeling Academic Program Costs: Methodologies, Key Variables, and Formulas
Through a guided tour of the electronic resources including institutional examples, you will be introduced to various methods you can use to calculate academic program costs. We will focus on various levels of calculations and methodologies and provide opportunities to discuss which method will be right for you based on what you shared in the previous discussion. This cost model is designed for new academic program cost pro-formas but may also be easily adapted for current program cost analysis.

3:30 - 3:45 p.m.
Break
AGENDA

WEDNESDAY, DECEMBER 6, 2017 (CONTINUE)

3:45 - 5:00 p.m.  
**Working Session: Building Your Own Prototype Cost Model**  
You will have an opportunity to apply what you learned in the previous session to begin building your prototype model 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. We will wrap-up this session with final Q&A and sharing on your model.

5:00 - 6:00 p.m.  
**Networking Reception (included in registration fee)**

THURSDAY, DECEMBER 7, 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 - 11:15 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.

11:15 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. This session will walk you through the free data sources available to conduct an external demand analysis and some key aspects to their application to an academic program market analysis. You will also have an opportunity to work in groups and practice analyzing an external demand scorecard to generate your own ideas on what programs to start based on the market data presented.

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.
AGENDA

THURSDAY, DECEMBER 7, 2017 (CONTINUE)

2:30 - 3:30 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.

3:30 - 3:45 p.m.
Break

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.

FRIDAY, DECEMBER 8, 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 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
In our final session, our expert panel will be available to answer remaining questions and additional support on your cost analysis. This session will also provide an opportunity to share with your peers on your next steps for when you return to campus.

11:45 a.m. - 12:00 p.m.
Closing Remarks
INSTRUCTORS

Robert Atkins, CEO & 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.

Bob 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.

John Barnshaw, Associate Vice President for Research and Statistics, Ad Astra Information Systems
John is responsible for creating research and statistical solutions that facilitate unit and institutional improvement. Dr. Barnshaw also is involved in statistical support for the Higher Education Scheduling Index as well as refining Scheduler, and Platinum Analytics. Prior to joining, Ad Astra, John served as the Director of Research and Public Policy at the American Association of University Professors, where he was responsible for the Faculty Compensation Survey, the largest study of faculty salary and benefits of higher education in the United States. In addition to his responsibilities related to faculty compensation, Dr. Barnshaw also explored a variety of research-related activities across the higher education landscape pertaining to the academic labor force, tuition, and instructional expenditures. Dr. Barnshaw also directed the National Study of Instructional Costs and Productivity (Delaware Cost Study), a longitudinal benchmarking study that explores faculty teaching, separately budgeted research and public service, and expenditures at the discipline level for four-year institutions.

In 2015, John founded Systematic Research Solutions, a consulting organization designed to partner with institutions to use align strategic planning, data, advanced research techniques, and stakeholder engagement to facilitate unit and institutional improvement. Dr. Barnshaw blends his wealth of experience and his knowledge of higher education best (and worst) practices to work with faculty and administrations to help those looking to allocate their resources as efficiently as possible.

William Crawley, Ed.D., Dean of the 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.
INSTRUCTORS

Tony Honeycutt, 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 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.

Robert Allen 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 as Financial Planning and Budget Director at Oberlin College.

Lisa Kopecky, Vice President Finance and Operations, Cape Cod Community College
Ms. Kopecky, now the Vice President for Finance and Operations at Cape Cod Community College was recently the Assistant Vice President for Academic Operations and Finance at California State University Fullerton. There she served as the Academic Affairs division manager for fiscal and facility resources for 150 departments serving more than 40,000 students at CSUF. With 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), she began her career with the Corporate Credit Union League of NY, served 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  Vs  Intimate, workshop-style event with personalized attention

Many concurrent sessions; forcing choice  Vs  One focused learning track

Uneven sessions and less outcome-focused, driven by an open call for proposals  Vs  Needs-driven and meticulously planned with practical outcomes
- Action plans and next steps to use upon returning to campus
- Carefully-vetted expert instructors that are also practitioners in the field

Lecture-based  Vs  Learner-centric and designed for interaction and collaboration

Large networking events with vendors  Vs  Small-scale opportunity to truly connect with colleagues in the same position at other institutions

Some slide presentations posted online after the event  Vs  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

December 6 - 8, 2017 :: Orlando, FL

HOTEL:
Rosen Shingle Creek
9939 Universal Blvd.
Orlando, FL 32819

To reserve your room, please or call 866-996-9939. Please indicate that you are with the Academic Impressions group to receive the group rate.

ROOM RATE:
The rate is $149 for single or double occupancy, plus applicable tax.

ROOM BLOCK DATES:
A room block has been reserved for the nights of December 5, 6 and 7, 2017.

RATE AVAILABLE UNTIL:
Make your reservations prior to November 14, 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:
The Rosen Shingle Creek is nestled on a 230-acre site along Shingle Creek.

TRANSPORTATION:
The hotel is approximately 12 miles for Orlando International Airport (MCO).

Shuttle:
Mears Transportation $21 (one way) $33 (roundtrip) with online discount
http://www.mearstransportation.com/
Phone: 855.463.2776
CONFERENCE
MEASURING ACADEMIC PROGRAM COST AND DEMAND FOR IMPROVED RESOURCE ALLOCATION
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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.

A $500.00 surcharge applies to registrants from corporations.

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EARLY BIRD PRICING
Postmarked on or before November 17, 2017. For registrations postmarked after November 17, 2017, an additional $100 fee per registrant applies.

REGISTER ONLINE or on the next page.
CONFERENCE REGISTRATION INFORMATION

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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

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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

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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

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.

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.