



CONFERENCE

MEASURING ACADEMIC PROGRAM COST AND DEMAND FOR IMPROVED RESOURCE ALLOCATION

December 3 - 5, 2018
New Orleans, LA



AGB | INSTITUTIONAL STRATEGIES
agbis.org

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Learn how you can better inform your institution's approaches to academic program cost and demand analysis.

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OVERVIEW

Gain the tools and skills you need to understand the financial contributions of your academic programs, and thus inform decisions across campus. During this 2-day training, you will learn the basis for building your own cost and demand model so you can better:

- Understand the financial realities of current programs
- Identify new opportunities based on your market
- Calculate proforma and milestones on new academic programs
- Effectively communicate information to a variety of audiences
- Integrate technology tools to increase speed and service
- Set success milestones and prioritize for action

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 for core programs and new and innovative opportunities.

ACTIVE LEARNING: BRING YOUR DATA AND YOUR LAPTOP

There will be ample time for you to 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.

To help us prepare for you and ensure the content meets your needs, you will be asked to complete the following upon registration:

1. A survey so we can learn more about your specific questions and needs, and
2. A template with your institutional data that will help you contextualize the concepts and working session activities.

[VISIT EVENT PAGE](#)

www.academicimpressions.com/measuring-academic-program-cost-demand-improved-resource-allocation/



OPTIONAL FULL-DAY WORKSHOP: INNOVATING NEW BUSINESS MODELS FOR YOUR CAMPUS | DECEMBER 3, 2018

Learn how to foster innovative thinking that will shape and sharpen your business model. This full-day workshop will walk you through a dynamic planning exercise to help you bring more voices to the conversation in a structured framework. Through case-study examples and practice sessions, you will learn how to innovate new business models for potential implementation.

OPTIONAL HALF-DAY WORKSHOP: A BUDGETING TOOL FOR IMPROVED ACADEMIC RESOURCE MANAGEMENT | DECEMBER 5, 2018

This optional workshop following the main conference on Wednesday afternoon is facilitated by Bill Massy, author of the critically acclaimed book, *Reengineering the University*. You will work with teams to simulate an analytical approach to budgeting using a beta tool in Excel. This tool can improve the normally difficult and chaotic process of resource allocation by providing a new level of objectivity and analysis to support constructive budgeting discussions on your campus. Copies of the tool, with operating instructions and descriptive material, will be supplied for take-home use.

TWO BACK TO BACK EVENTS - FIND THE RIGHT LEVEL OF TRAINING FOR YOU

There are no prerequisites required for this program and you'll get the most value from this program if you are just beginning your program cost and demand analysis. If you are further along in the process, while this program may reinforce what you've already done and shed light on the process used at other universities, it may not be new information. Consider attending Activity-Based Costing (ABC) for Academic Resource Management for more advanced levels of analysis.

If you have questions about these programs or which would best fit your needs, please reach out to [Grace Royal](#) to help determine which program is best for you.

GET EVERYONE ON THE SAME PAGE - BRING YOUR TEAM!

This training is designed for teams of academic program leaders, and the financial analysts, business officers, and institutional researchers who wish to support them in the early stages of building a cost model for new and existing programs.



CPE CREDIT AVAILABLE

Recommended CPE Credits:

- 19 for conference + workshop
- 12 for main conference
- 6.5 for workshop

Program Field of Study: Specialized Knowledge and Applications

Delivery Method: Group-Live

Prerequisites: None

Program Level: Basic



AGENDA

DECEMBER 3, 2018

Full-Day Pre-Conference Workshop: Innovating New Business Models for Your Campus

Learn how to foster innovative thinking that will shape and sharpen your business model. This full-day workshop will walk you through a dynamic planning exercise to help you bring more voices to the conversation in a structured framework. Through case-study examples and practice sessions, you will learn how to innovate new business models for potential implementation.

8:00 - 8:30 a.m.

Pre-Conference Registration

8:30 - 9:00 a.m.

Continental Breakfast (included in workshop registration fee)

9:00 - 9:30 a.m.

Opening Remarks and Introductions: Innovation on Your Campus

You will share with your peers and our experts how innovation is currently being handled on your campus and/or some challenges associated with getting innovative ideas generated and brought to fruition.

9:30 - 10:30 a.m.

Components of Innovation: Creating a Shared Language

How can you discuss innovation on your campus in a way that aligns campus leaders, students, faculty, and staff? In this session, you will assess where your campus is in terms of an innovative mindset and look for potential obstacles for rethinking the current business model.

10:30 - 10:45 a.m.

Morning Break

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

Business Models as Tools for Understanding, Improvement, and Innovation

This module introduces business model innovation and the business model canvas. The best way to understand business modeling tools and techniques is to walk through several substantially different examples and then complete a canvas worksheet from scratch. To accomplish this experience, we walk participants through examples of completed canvases that will demonstrate uses as descriptive, diagnostic, optimization, and innovation tools. You will build your first business model canvas and share it in small groups for comment, feedback, and discussion using scenarios from your own experience. This session will also include time to reflect and react to what you've heard so far.

12:00 - 1:00 p.m.

Lunch (included in workshop registration fee)



AGENDA

DECEMBER 3, 2018 (CONTINUED)

1:00 - 1:30 p.m.

Using the Business Model Canvas: Scenarios in Higher Ed

We will explore the applications and uses of the business model canvas, an innovative thinking tool. Our experts will share several applications in higher ed today so you can learn the full range of this tool and the impact on your institution.

Examples will include:

- Financially struggling institutions
- Developing new revenue streams
- Simplifying complex portfolios
- Exploring new learning delivery models
- Developing innovation centers on campus

Three examples of real applications of the business modeling at institutions will be given.

1:30 - 2:30 p.m.

Business Models for Higher Education: Round 1

Once you have a full background of the tool and some examples under your belt, we will move to actively building the model. With your peers, you will be guided through an interactive poster exercise to establish your institutional context and current situation in a compelling visual aid that you can take back with you. These will be presented to the full workshop for comment, discussion, and shared insight.

2:30 - 2:45 p.m.

Afternoon Break

2:45 - 3:45 p.m.

Business Models for Higher Education: Round 2

In round two, we will address and share the major areas within your institution that require innovation. Small teams will select a topic for innovation and extend their thinking from idea to business model.

3:45 - 4:20 p.m.

Poster Session

During this final session of the day, you will share on your second round of the business model canvas. You will also reflect on where you will be able to use this business model, apply this technique, and exchange ideas with your peers for overcoming challenges and taking action.

4:20 - 4:30 p.m.

Wrap-up



AGENDA

MAIN CONFERENCE DAY ONE: DECEMBER 4, 2018

8:00 - 8:30 a.m.

Main Conference Registration and Continental Breakfast (included in your registration)

8:30 - 9:00 a.m.

Opening Remarks and Introductions

9:00 - 10:00 a.m.

Program Analysis Methods and Planning your Approach

This session will share an overview of available cost analysis methods and set the stage for establishing your own approach to cost analysis. It will include an exercise designed to support your own planning process to better define strategies for successful collection and alignment of your data with different budget models in mind.

10:00 - 10:15 a.m.

Morning Break

10:15 - 11:30 a.m.

Institutional Examples of Program Cost Analysis

There are common barriers to conducting a successful program cost analysis. You will learn key strategies real institutions used to conduct a full program cost and demand analysis, and most importantly, how to overcome some of the common challenges you have identified. Through real university and college examples, you will discover how they:

- Identified financial realities and prosperity gap
- Planned and coordinated their approach to meet financial realities
- Engaged the academic community from the start
- Designated champions and communicated through the entire process
- Incorporated university level budget models and various expenses

There will be time throughout to ask questions and share your own reactions to what you've learned.

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

Peer Discussion: Preparing for Program Cost Analysis

This robust discussion will be an opportunity to share your reactions to the case study examples and your early thinking on preparing for cost analysis.

12:00 - 1:00 p.m.

Lunch (included in your conference registration)

1:00 - 1:45 p.m.

Program Cost Model: Determining the Contribution Margin at the Program Level Using Direct Costs

This hands-on session will provide you a teaching tool in Excel for you to build a cost model for a new or existing academic program using sample data provided. Once you master this process, you may opt to build your own model with your data you brought to the conference.

(Please bring your fully charged laptops with a USB port to participate).



AGENDA

DECEMBER 4, 2018 (CONTINUED)

1:45 - 2:30 p.m.

Working Session: Building your Own Cost Model Round 1

You will have an opportunity to work on the sample problem or your own cost model using your laptops and the Excel tool provided.

2:30 - 2:45 p.m.

Afternoon Break

2:45 - 3:45 p.m.

Institutional Example Part 2: Alternative Models and Methods

This session will share on an institutional example from Virginia Commonwealth University that has recently implemented a decentralized budget model. This will surface the key factors for allocating indirect costs and expanding your cost model no matter what your budget model.

3:45 - 4:30 p.m.

Working Session: Building your Own Cost Model Round 2

You will have an opportunity to expand your cost model based on the information you just learned on the indirect cost methods.

4:30 - 5:00 p.m.

Balanced Scorecard (demonstration)

5:00 - 6:00 p.m.

Networking Reception (included in registration fee)

MAIN CONFERENCE DAY TWO: DECEMBER 5, 2018

8:00 - 8:30 a.m.

Continental Breakfast (included in your registration)

8:30 - 10:00 a.m.

Effective Collection and Use of Essential Market Demand Data

A healthy program portfolio meets institutional, academic, financial, and market requirements. Now that you've identified areas in need of improvement, this informative session will dive into the data you will need to collect to conduct a market demand analysis to build your business case for a new or existing academic program. You will learn:

- The 4 components of a market demand analysis
- The 5 key ingredients for better data
- The best freely available resources to find the data
- How to effectively use market data to inform new and existing programs
- You will also have an opportunity to practice a sample analysis with your peers.



AGENDA

DECEMBER 5, 2018 (CONTINUED)

10:00 - 10:15 a.m.

Morning Break

10:15 - 11:15 a.m.

Communication and Engagement Strategies for Cost Analysis

This energizing session will provide you a foundation for engaging leadership in the analysis and strategies for translating financial data into empowering initiatives.

11:15 - 11:45 a.m.

Working Session/Consulting Time: Moving forward with your Cost and Market Demand Analysis

While you are continuing your work on your cost models, you will receive small group consulting sessions to ensure you have the tools and knowledge you need to continue the work following the conference.

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

Action Planning and Wrap-up

With guidance, you will share your goals and actions to move forward with your cost and demand analysis project.

Optional Half-Day Workshop: A Budgeting Tool for Improved Academic Resource Management

12:00 p.m. - 1:00 p.m.

Lunch for Post-Conference Attendees (included in registration fee)

1:00 p.m. - 4:00 p.m.

Optional Half-Day Workshop: A Budgeting Tool for Improved Academic Resource Management

This optional workshop following the main conference on Wednesday afternoon is facilitated by Bill Massy, author of the critically acclaimed book, Reengineering the University. You will work with teams to simulate an analytical approach to budgeting using a beta tool in Excel. This tool can improve the normally difficult and chaotic process of resource allocation by providing a new level of objectivity and analysis to support constructive budgeting discussions on your campus. Copies of the tool, with operating instructions and descriptive material, will be supplied for take-home use.



INSTRUCTORS

David Allen, Associate Director of Budget and Resource Analysis, Virginia Commonwealth University, dwallen@vcu.edu

David currently works in the Office of Budget and Resource Analysis at Virginia Commonwealth University. He has been working in higher ed for over 10 years with a focus on financial management at various levels. In conjunction with the Universities Budget Director, he is responsible for the development and monitoring of the University's budget of over \$1.1 billion. In addition, he is responsible for the development and implementation of the University Budget Re-design initiative, an RCM style budget model, from an incremental model. Finally, he leads a team in the development and implementation of a multi-year financial planning tool for senior leadership and the development and implementation of budget plans for the universities strategic initiatives. Over his career, he has been the Associate Dean for Business and Administration for a School of Nursing, the Director of Administration for the Center of Clinical and Translational Science and has work in various roles with a School of Medicine. David is a CPA with a master's degree in accounting and information systems and is pursuing a Ph.D. in Health Administration.

Robert Brodnick, Co-Founder, Sierra Learning Solutions, rob@sierralearningsolutions.com

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.

Leslie Brown, Director, Budget and Resource Analysis, Virginia Commonwealth University, lbrown39@vcu.edu

Leslie has nearly 30 years of budget development experience across government, non-profit and higher-education. After 18 years with NYU as a school finance officer she is now responsible for the oversight of the development, implementation and administration of VCU's \$1.1B operating budget. This not only includes administration of the university annual revenue and expense budgets but also work as a partner in the multi-year planning process. Over the past three years, Leslie and her team have also successfully developed, tested, communicated and implemented a new decentralized budget model which will go live the summer of 2018.

Jim Hundrieser, Ph.D., Associate Managing Principal, Association of Governing Boards Institutional Strategies

Jim's consulting practice includes supporting institutions with strategic decision making around their academic portfolio through cost/benefit analysis. Over his 30-year career in higher education, Jim has served in a variety of roles from an institutional vice president, to consultant, to faculty member, to residence hall director. Prior to joining AGB Institutional Strategies, Jim led the reengineering efforts of Plymouth State University's undergraduate admissions department, which resulted in two straight years of record first-year enrollment with more college ready students. As vice president of student development at Lynn University, he led an effort that increased first to second-year retention rates by 8 percent in two years. Jim also served in a senior role consulting for Noel-Levitz as their Vice President for Strategic Enrollment Management. There he worked with more than 50 campuses to create strategic enrollment plans, comprehensive retention strategies, and campus workshops on improving the quality of student life and learning. He holds a BS from Northern Michigan University, an MEd from Plymouth State University, and a PhD in leadership and education from Barry University (FL).



INSTRUCTORS

Lisa Kopecky, Vice President Finance & Operations, Cape Cod Community College, lkopecky@capecod.edu

Ms. Kopecky, previously held the position of 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 held the position of 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. Throughout her career, Lisa has successfully streamlined operations and access to financial information through design and implementation of workflow and online reporting tools; orchestrated the largest renovation and relocation project in CSUF history with more than 750 offices and 78,000 square feet involved; and planned for and provided direction to hundreds of classroom and facilities improvement projects, of varying size and complexity.

Bill Massy, Consultant to Higher Education, Former CFO at Stanford

Dr. Massy, an emeritus professor and former officer of Stanford University, has been active as a teacher/researcher, consultant, and university administrator for more than forty years. After gaining tenure in Stanford's Graduate School of Business, he served the central administration as Vice Provost for Research, Acting Provost, and Vice President for Business and Finance—during which time he developed and pioneered financial planning and management tools that have become standard in the field—and then as Professor of Higher Education working on resource allocation, cost containment, and academic quality assurance and improvement. He co-directed the Department of Education's National Center for Postsecondary Improvement from 1996 to 2002, served on Hong Kong's University Grants Committee from 1991 to 2003, and has been an Honorary Faculty Fellow at the University of Melbourne (AU) since 2010. His most recent book is *Reengineering the University: How to Be Mission Centered, Market Smart, and Margin Conscious* (Johns Hopkins University Press, 2016). Dr. Massy holds a Ph.D. in economics and MS in management from the Massachusetts Institute of Technology, and a BS from Yale University.

Donald M. Norris, President, Strategic Initiatives, Inc., dnn@strategicinitiatives.com

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 NACUBO'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).



INSTRUCTORS

Mary Pahissa Upchurch, Senior Partner, Gray Associates

Mary leads Gray's relationships with several of the firm's largest education clients. Her work includes strategy development, program portfolio evaluation, new program selection, customer segment analysis, market and program analyses, brand value and offer optimization, and location selection.

In addition, Mary has over 25 years of management experience with AT&T, most recently as a Vice President. At AT&T, she led Strategy & Business Planning for the Consumer business unit and held a variety of positions in Integrated Product Marketing, Product Management, Field Operations, Customer Care, Technical Support and Sales. She was named AT&T's Catherine B. Cleary "Woman of the Year" for 2001.

Mary currently serves on Arizona State University's Morrison Institute for Public Policy Advisory board and is a member of its Executive Committee. She is a member of the Board of Directors of Fresh Start Women's Foundation and served as its Board Chair for two terms. She is also a past member of Greater Phoenix Leadership, serving as co-chair of its P-20 Education Committee.

Mary holds a Master of Science in Management degree from Purdue University. She received a Bachelor of Arts degree in Organizational Communications from Rollins College, graduating with high honors.



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

December 3 - 5, 2018 :: New Orleans, LA

HOTEL:

Hyatt Regency New Orleans
601 Loyola Ave.
New Orleans, LA 70113
504.561.1234

Room Rate: \$189 + tax

Room Block Dates: The nights of December 2, 3, and 4, 2018.

Rate Available Until: November 12, 2018.

Reserve Your Room: Please call 504.561.1234 and indicate that you are with the Academic Impressions group to receive the group rate. Please book early - rooms are limited and subject to availability.