CONFERENCE

ACADEMIC RESOURCING MODELS FOR EVIDENCE-BASED DECISION-MAKING

December 5 - 6, 2019 | San Antonio, TX

Learn how to analyze the use of academic resources to inform decision-making.

OVERVIEW

Academic Resourcing Models (AR Models), which combine Activity-Based Costing (ABC) and Activity-Based Budgeting (ABB) analysis, are decision-support tools for academic resource management and related financial decisions. During this one-and-a-half-day event, you will take an in-depth look at how the model improves decisions on program size, teaching methods, faculty workload, space utilization, staffing, and enrollment decisions down to the course level. Through these applications you will gain an in-depth understanding of data and analysis that can inform decisions about program investment and disinvestment and the launching of new programs. You will learn:

- How to conduct an activity analysis and incorporate indirect costs into your cost model
- Ways to determine the economic impact of course redesign
- How enrollment mix can influence the costs
- Effects of unsponsored research and other non-time tabled activities on course and program margin
- How to build excitement and responsibility for data on your campus
- How to configure and scale your own ABC model

During the event, you will select a focus area for introducing ABC and learn strategies for piloting your own program back on your campus.

PRE-CONFERENCE WORKSHOP: A BUDGETING TOOL FOR IMPROVED ACADEMIC RESOURCE MANAGEMENT | DECEMBER 5, 2019

This optional pre-conference workshop on Thursday 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.

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

You'll get the most value from this program if you are further along in the process and ready for advanced levels of analysis. If you are just beginning the process of program cost analysis, consider attending Using Decentralized Budget Principles to Enhance Operational Effectiveness, taking place December 4-5 in San Antonio, TX, right before this program.

If you have questions about these programs or which would best fit your needs, please reach out to Nick Pettet to help determine which program is best for you.

WHO SHOULD ATTEND – 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.

BRING YOUR TEAM AND SAVE!

Save over 15% when you register three or more colleagues.

CBE CREDITS

12.0 for conference + workshop

8.5 for main conference

3.5 for pre-conference workshop

Program Field of Study: Specialized Knowledge

Delivery Method: Group-Live

Prerequisites: None

Program Level: Basic

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AGENDA

Day 1 | Thursday, December 5, 2019

Pre-Conference Workshop: A Budgeting Tool for Improved Academic Resource Management | December 5, 2018
1:00 - 4:00 p.m.

This workshop provides you an analytical tool to balance your institution's qualitative mission-based values with hard quantitative data on cost, margin, etc. to shift budgeting conversations to a more objective and evidence-based viewpoint.

Topics will include:

- Setting market and financial metrics that matter to your institution
- Determining significance and weights on university priorities
- Combining the data to determine the optimal path
- Strategies to adapting the tool for your institution

Bill Massy, author of *Reengineering the University*, will guide you through the principles and calculations and consult with you as you practice your own analysis and decision-making using sample data. You will leave with the tool in hand that you can adapt it for your own university. Electronic copies of the tool (with operating instructions and descriptive material) will be supplied for take-home use. You will need your laptop and Excel to directly participate in the workshop's hands-on components.

Day 2 | Friday, December 6, 2019

Main Conference Registration
8:00 - 8:30 a.m.

Continental Breakfast (included in registration fee)
8:30 - 9:00 a.m.

Introductions and Opening Remarks: Call to Action
9:00 - 10:00 a.m.

This opening hour will provide an opportunity for you to meet the instructors and share on your current challenges supporting your strategic and operational priorities. You will also preview the framework for the event and receive guidance on how you can get the most from the experience.

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Day 2 (CONTINUED)

Examples of How ABC Informs Academic Resource Allocation Decisions
10:00 a.m. - 12:00 p.m.

This session provides an overview of the model and explains why the data are so important for academic resource management. Our expert will illustrate these points using scenarios based on real institutions that have adopted ABC. You will learn how to use ABC-generated evidence in key areas such as:

- Decisions about programs and course offerings
- Faculty workload and budgeting for faculty lines
- The impact and treatment of overhead
- Classroom utilization improvement
- Online and multiple campus considerations

Lunch (included in your registration)
12:00 - 1:00 p.m.

Academic Resource Allocation Scenarios
1:00 - 3:00 p.m.

You will be introduced to scenarios designed to illustrate how the model can enhance your academic resource management. Scenarios will illustrate capital planning, staffing, and strategic enrollment decisions among others relevant to what you share in the pre-conference survey. You will work with your peers on a series of real-life decision problems based on recent interviews with model users at eight universities in the United States and Australia.

Afternoon Break
3:00 - 3:15 p.m.

Process Considerations for Piloting Your Own ABC Model on Your Campus
3:15 - 4:30 p.m.

Now that you understand the impact of the ABC analysis, this session will guide you through the overall process. You will learn the full cycle of ABC implementation including:

- Data Readiness and building a data culture on your campus
- Overcoming data integrity and accessibility challenges
- Organizational structures and talent development to support these initiatives
- Timeline and planning for a pilot study
- Building capacity and vendor selection

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Day 2 (CONTINUED)

Q&A and Wrap-Up
4:30 - 5:00 p.m.

INSTRUCTORS

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.

Anthony Pember

Senior Manager, Decision Analytics Service Line, Grant Thornton LLP

Anthony has extensive consulting experience leading a variety of business, modeling, and information technology initiatives within the higher education, commercial, and not-for-profit sectors. Anthony has supported and advised higher education, federal government, and commercial clients with their cost management and performance improvement projects in the United States, Australia, Canada, Mexico, and Great Britain. Anthony's areas of expertise include activity-based costing, cost allocation models, predictive modeling, performance management, and cost analysis. Within the higher education sector, Anthony has worked with multiple universities in both the United States and Australia building cost models, performing critical data analysis, and advising clients in areas associated with their cost management and strategic resource alignment needs. Some of Anthony's recent experience in the higher education sector includes: Rutgers University, Georgetown University, University of California Riverside, University of Maryland College Park, Bentley University, Johnson County Community College, New York Institute of Technology, Arizona Board of Regents, University of Southern Queensland (Australia), Deakin University (Australia), and Pennsylvania College of Health Sciences. Anthony has published several articles on the use of management accounting principles to drive environmental performance—a novel approach to using traditional management tools in a new way. Anthony currently serves on the Board of the Consortium of Advanced Management-International (CAM-I), a preeminent non-profit cost, performance, and process research organization.

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ACADEMIC IMPRESSIONS STAFF

Nick Pettet

Program Manager

Nick is a Program Manager in Annual Giving, Alumni Relations, and Advancement Services at Academic Impressions. Prior to joining, Nick served in AmeriCorps as an instructor in adult literacy, worked at the American Council in institutional research, and most recently, he held the position of Assistant Director of Professional Certificate Programs at Georgetown University.

Nick is a first generation college graduate, having first earned his Associate's degree from Rogue Community College, where he began to discover his love for learning. He went on to earn his Bachelor's from University of Oregon, and his Master's from George Washington University. Nick is happily married to his wife Katie and loves to spend time with her and their son Greyson. He enjoys traveling, reading, running, and the occasional round of golf.

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LOCATION

December 5 - 6, 2019 | San Antonio, TX

Hotel:

Grand Hyatt San Antonio

600 East Market Street

San Antonio, TX 78205

210.224.1234

Room rate:

$189 + tax

Room block dates:

The nights of December 3, 4 and 5, 2019.

Room block cutoff date:

November 13, 2019.

Reserve Your Room: Please call 210.224.1234 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.

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