Higher Education Strategic Finance & Resource Efficiency Workshop

Essential finance and management accounting tools to drive performance and informed decision making in a changing higher education environment

EXPLORE

• Innovations and techniques utilised by leading overseas Universities

• The pathway to a more commercial business environment

• Aligning budgeting and forecasting with strategic planning

• Outcomes-focused budgeting to support strategy execution

• Process improvement for cost reduction and resource efficiency

• Designing costing approaches to aid decision-making: re-thinking traditional models and considering Activity Based Costing (ABC) and Time-Driven ABC

• Achieving an agile, predictive and responsive finance function

1 & 2 November 2017  Melbourne
27 & 28 November 2017  Sydney
29 & 30 November 2017  Brisbane

EARLY BIRD & GROUP DISCOUNTS AVAILABLE

Register and Pay by 23 August 2017 to receive additional Value Plus Discounts!

Please note participant numbers will be strictly capped to ensure a quality, interactive experience for attendees

CPD/CPE Guide
Clock up to 14 hours of structured learning!*

*Check with your local professional association or society for eligibility.

Phone: +61 2 8239 9711

www.liquidlearning.com
Booking Code - W

EXPERT FACILITATOR

Kevin Riley
Managing Director
Riley & Riley - Strategy Advisers
BACKGROUND
Finance professionals in the University and post-secondary education sector are facing an increasingly challenging and complex business environment. With greater pressure, demands and scrutiny being placed on the financial management of institutions along with an underlying need to become more commercial, it is vital for tertiary financial professionals to develop advanced skills in financial management, forecasting, budgeting, and costing to drive resource efficiency, improve strategic planning and to ensure that overall institution outcomes can be achieved.

This interactive and practical program will enable you to gain insights into global trends in Higher Education finance and benefit from tools and techniques which have been utilised by Universities around the region. The course is designed to rapidly accelerate the skillsets of attendees and provide the hands-on, practical guidance required for implementing contemporary finance tools. Attendees will understand the evolving role of finance in the higher education sector and will be equipped with the knowledge, skills and techniques needed to transform finance to become more forward-looking and responsive while driving financial excellence in your organisation and responsive while driving financial excellence in your institution.

TRAINING DELIVERY AND PRE-COURSE QUESTIONNAIRE
This workshop will be delivered using a three tiered approach. The structure of each session is as follows:

1. Technical overview and review of research into the topic area under discussion
2. Practical application of management principles in the review of case studies, worked examples and interactive exercises
3. Discussion of outcomes and implementation issues

Workshop participants will have the opportunity to include comments and questions about issues outlined in the program by way of a pre-course questionnaire. This feedback will enable the course facilitator to adjust content accordingly. The workshop has limited places to allow for customisation, greater interactivity and for individual concerns to be addressed.

IN-HOUSE TRAINING AVAILABLE
Do you have a team of ten or more people requiring this training? If so, it may be more cost effective for Liquid Learning to bring the training to you. Contact us to discuss your needs today.

INTRODUCING YOUR FACILITATOR

Kevin Riley
Managing Director
Riley & Riley - Strategy Advisers

Kevin Riley has more than 28 years of experience in financial and performance management and budgeting, as well as over 18 years of experience in designing and delivering training programs in finance, strategy and management. In particular he specialises in strategic decision making and strategy execution, strategic planning and evaluation, business process analysis and improvement, financial and non-financial KPIs, improving financial literacy and business acumen, as well as strategic financial management and financial control. As a well-regarded and respected consultant, trainer, coach and facilitator, Kevin provides a blend of presentational excellence, expertise in financial and performance management best practice, and an understanding of the cultural issues affecting and managing change.

He has assisted management teams in a wide range of organisations to develop and implement their financial and operational performance improvement strategies, including capital-intensive mining companies, manufacturing and processing companies, service and office product firms, natural resource managers, and government departments and agencies.

Prior to establishing his own business in 1996, Kevin was a Managing Consultant with Coopers & Lybrand and Senior Audit Manager with PricewaterhouseCoopers (PwC).

WHO WILL ATTEND
Deputy Vice-Chancellors, Pro Vice-Chancellors, Chief Financial Officers, Bursars, Treasurers, Financial Controllers, Finance Directors, Senior Managers from University and Post-Secondary Education Institutions who are involved in:

- Financial Management
- Management Accounting
- Management Reporting
- Strategic Planning
- Cost Management and Analysis
- Finance Systems / Financial Management Information System (FMIS)
- Resource Planning and Management
- Business Planning and Analysis
- Financial Forecasting
- Budgeting
- Evaluation, business process analysis and improvement

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VALUE PLUS DISCOUNT
Receive $300 off registration if you register and pay by 23 August 2017

SUPER SAVER DISCOUNT
Receive $200 off registration if you register and pay by 20 September 2017
Day One

The changing financial landscape of Higher Education
• Emerging trends and challenges in higher education marketplace
• Top concerns in a competitive environment with escalating costs and reductions in revenue and funding streams
• Moving towards better performance outcomes and achieving cost effectiveness
• Drivers of success to achieving strategic cash flow management and resource efficiency

Rethinking finance: Finance as a University business partner
• Finance transformation – the shift towards a more commercial and competitive business environment
• Positioning finance as a value-adding function to support University / institutional strategies – what capabilities are needed
• Insights into the role of finance as a business partner to drive organisational growth – producing value-adding analysis and evaluation
• Shifting mind-sets to become more forward-looking and responsive to reforms in the higher education sector
• Stepping up to compete in an increasingly globally competitive industry

CASE STUDY EXAMPLES

Long-term financial budgeting and forecasting techniques for Higher Education
• Traditional budgeting processes: allocation-based budgeting, targeting and forecasting
• Improving forecasting processes: methodologies and frameworks
• Integrating and aligning student load, asset, financial and workforce planning with the university strategic planning and financial framework
• Reviewing “Beyond Budgeting” principles
• Engaging in frequent scenario planning to forecast the potential impact of a range of uncontrollable events to the annual plan
• Rolling forecasts: improving from traditional budgeting processes to include scenario analysis

Aligning budgeting with strategy for better outcomes
• Understanding the alignment between budgets and strategic planning to achieve organisational goals
• Aligning operating (OPEX) and capital budgets (CAPEX) with strategy
• Developing a high performing, outcomes-focused budget practice to support strategy execution
• Developing a strategic scorecard – integrating financial and strategic performance reporting

INTERACTIVE GROUP EXERCISE AND CASE STUDY EXAMPLES

Day Two

Linking strategy to business planning
• Developing an outcome focused planning model
• Outcomes budgeting, predictive costing and predictive planning
• Linking organisational strategic planning to teaching and learning and research activities to improve resource efficiency
• Developing performance measures for teaching and learning and research activities to support financial decision making

Strategic cost management for the Higher Education sector
• Examining cost control and management in your institution
• Understanding your University’s cost behaviour and the true drivers of cost
• Streamlining processes for cost reduction and resource efficiency in the University
• Providing greater visibility of research costing, course contributions and margins
• Establishing a framework for integrating costing information into course contribution, profiling and strategic planning

CASE STUDY EXAMPLES

Applying costing approaches and tools to improve bottom line performance
• Assessing your costing “maturity” using the International Federation of Accountants ‘Costing Continuum’
• Re-thinking traditional costing approaches
• Considering Activity Based Costing Methods – using cost drivers, activities and cost objects
• Validating cost information output from the ABC model to produce reliable reports for management
• Considering the advantages of Time-Driven Activity Based Costing (TDABC)

INTERACTIVE GROUP EXERCISE AND CASE STUDY EXAMPLES

Driver-based predictive modelling in a University context
• Identifying the key drivers that enable you to predict the future
• Predictive modelling as a financial management tool for the higher education sector
• Applying predictive models in enrolment and income generation process in higher education
• A predictive model in action: An Australian University scenario
• Identifying the limitations and risks of predicative modelling in an uncertain future

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Organisation Name
Address Suburb State Postcode
Booking Contact Information
Title Full Name Position
Email Phone

# Booking Details

# Organisation Name

2 November 2017 - Cliftons Melbourne
27 & 28 November 2017 - Cliftons Sydney
29 & 30 November 2017 - Cliftons Brisbane

# Resource Efficiency

Strategic Finance &

Higher Education

Workshop

# Registration Information

# Title

# Full Name

# Position

# Email

# Phone

# Options (per person)

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Discounted off standard rates:

- Save up to $300 off
- Save up to $200 off
- Save up to $100 off

# Conditions

- Group Discounts apply for bookings made simultaneously. Only one discount applies. Group discounts apply to standard rates only. Group discounts are not applicable to Value Plus, Super Saver and Early Bird rates. Discounts cannot be applied retrospectively and must be claimed at the time of booking. Liquid Learning Group Pty Ltd reserves the right to have sole discretion on an organisation’s eligibility for discounts.

- Note: Course materials, refreshments & lunches are included. Travel and accommodation are NOT included. Registration Options are per person only.

# Payment Details

Please note: Payment is required prior to attending this event.

- Credit Card
- Cheque (payable to Liquid Learning Group Pty Ltd)
- Electronic Funds Transfer

Please invoice to:

- Please invoice me:
  - Electronic Funds Transfer
  - Cheque (payable to Liquid Learning Group Pty Ltd)
  - Credit Card

Credit Card Details - Please charge my credit card for this registration:

- Card Type
- Visa
- MasterCard
- American Express
- Note: 2% surcharge applies to American Express payments

In-house Training Available:

- Do you have a team of ten or more people requiring this training? If so, it may be more cost effective for Liquid Learning to bring the training to you. Contact us to discuss your needs today.

Electronic Funds Transfer (EFT)

- Please transfer funds directly to:
- Westpac Account Name: Liquid Learning Group Pty Ltd
- BSB: 032 002
- Account No: 407 273
- SWIFT Code: WPACAU2S

Please quote ref HEF1117A

Amount

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# Privacy Statement

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# Disclaimer

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Please provide your details below:

- Name
- Position
- Signature
- Date

Email this form to: registration@liquidlearning.com.au or Call us on: +61 2 8239 9711

# Authority

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