University
Financial & Resources Planning
Ensuring sustainable university operations
26th & 27th March, 2014, L’Aqua, Sydney

Key speakers

Professor Jan Thomas
Vice-Chancellor
UNIVERSITY OF SOUTHERN QUEENSLAND

Professor Peter Rathjen
Vice-Chancellor
UNIVERSITY OF TASMANIA

Michelle Clarke
Chief Financial Officer
UNIVERSITY OF NEW ENGLAND

Nat McGregor
Chief Operating Officer
UNIVERSITY OF NEWCASTLE

Benefits of attending

➤ Align resource planning to the strategic vision of the university
➤ Streamline operations to maximise productivity
➤ Financial planning to ensure long-term sustainability
➤ Innovative strategies to maximise return on investment

See inside for more speakers

Plus 3 practical workshops run by a Vice-Chancellor and 2 Chief Financial Officers!

Pre, Mid & Post Conference Workshops

Workshop A
Led by: Professor Peter Rathjen, Vice-Chancellor, University of Tasmania
How to improve productivity within your university

Workshop B
Led by: Pranay Lodhiya, Chief Financial Officer, La Trobe University
How to achieve long-term financial sustainability

Workshop C
Led by: Michelle Clarke, Chief Financial Officer, University of New England
How to combine long-term strategy with budgeting

Register 3 delegates at the ‘standard price’ & bring a 4th delegate FREE!

To register
phone 1300 316 882
fax 1300 918 334
registration@criterionconferences.com
www.uniresourceplanning.com
Universities have all been coping under the strain of reduced government funding. All institutions have taken different financial and resourcing strategies to ensure they meet the strategic objectives of the university.

This conference examines case studies from a variety of universities, discussing the key tools being used to ensure the sustainability of their institutions.

- Explore how the reduction of government funding has impacted different universities
- Discover practical strategies to ensure the sustainability of operations
- Discuss future opportunities for the sector, including shared services across universities
- Identify tools to allocate finances and resources effectively

What a past delegate had to say...

“Insightful and honest assessment of budgeting and financial implications for each of the organisations represented in a changing higher education landscape.”

John Hearn,
Manager, Finance & Planning,
The University of Melbourne
(past delegate, Financial & Resources Planning in Universities 2013)

### Who will attend?

Senior University Executives involved in:
- Institution-wide strategy
- Finance
- Operations
- Budgeting
- Faculty finance

### Plus key contributions from:

- Pranay Lodhiya
  La Trobe University
- Ian Marshman
  The University of Melbourne
- Professor Peter Booth
  University of Technology Sydney
- Jessica Lightfoot
  Monash University
- Harry Banga
  The University of Sydney
- Paul Dowler
  Charles Sturt University
- Dr Paul Rowland
  University of Western Sydney
- Gordon McRobert
  Victoria University
- Colleen Pearson
  The University of Melbourne
- Professor Ken Dillon
  Charles Sturt University
- Robert Spano
  Alleasing

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### Endorsers & Media Partners
Day 1
Wednesday 26th March, 2014

8:00 registration, coffee & networking

8:30 welcome remarks from the chair

Maximising productivity across a university

8:40 ‘doing less better’ as a foundation for organisational success
- Identifying the risk in doing more with less to avoid unsustainable practices such as unreasonable staff workloads and a low risk appetite that stifles development and innovation
- Implementing a clear strategy to focus activity and create the discipline to stop doing things that don’t directly support the strategy
Professor Jan Thomas
Vice-Chancellor
University of Southern Queensland

9:20 boosting operational efficiency
- Opportunities for improving productivity across the university
- Strategies such as streamlining staffing models
Professor Peter Rathjen
Vice-Chancellor
University of Tasmania

12:40 networking lunch

1:40 improving productivity through strengthening the professional services
- Improving efficiency through eliminating non-value add processes and implementing automated systems where possible
- Utilising strategic initiative funding to improve production across the university
Jessica Lightfoot
Executive Director Financial Resources Management
Monash University

2:20 sharing services across functions to better allocate resources
- Benefits and motivation of sharing functions such as finance, human resources, marketing etc
- Overcoming the challenges in moving from faculty-specific to sharing
Gordon McRobert
Director Budgeting, Consulting & Corporate Finance
Victoria University

3:00 afternoon tea & networking

3:30 operational model of a highly decentralised faculty
- Managing the emerging and increasing costs across the university and hospital
- Effective financial and resources planning to ensure smooth operation of a complex faculty
Colleen Pearson
Director, Resources and Planning, Faculty of Medicine, Dentistry & Health
The University of Melbourne

4:10 achieving long-term sustainability in financial planning
- The context that universities are currently operating in
- The keys to financial planning success
- Strategies to achieve long-term sustainability
Pranay Lodhiya
Chief Financial Officer
La Trobe University

4:50 closing remarks from the chair & close of day one
Day 2
Thursday 27th March, 2014

8:00  Welcome, coffee & networking

8:30  Welcome remarks from the Chair

**Setting & reaching university strategic objectives**

8:40  Combining long-term strategy with budgeting
- Combining the process of both budget and strategy to align the two
- Efficient planning to fully integrate the budget and business plan
Michelle Clarke
Chief Financial Officer
University of New England

9:20  Strategic allocation of resources across the university
- Taking a whole of university view of resourcing
- What the efficiency dividend and other funding changes mean for Universities
- Strategies to optimise productivity and effectiveness
Nat McGregor
Chief Operating Officer
University of Newcastle

10:00 ROUND TABLE
Delegates will form groups to discuss the key challenges facing the sector

10:40 Morning tea & networking

11:10 Aligning budgets with strategic objectives
- Integrating planning and budgets across faculties
- Utilising budget levers to align behaviour with strategic goals
Ian Marshman
Senior Vice Principal
The University of Melbourne

11:50 Speed networking
This is an opportunity to network with attendees across universities. Don’t forget to bring plenty of business cards!

12:30 Lunch & networking

1:30  Planning tools to achieve strategic goals
- Devising and planning for short, medium and long term goals
- Utilising practical tools to align resources with an institution’s strategic vision
Professor Peter Booth
Senior Deputy Vice Chancellor
University of Technology Sydney

2:10  Thinking strategically & keeping the big picture in mind
- Defining a unique vision for your institution
- Setting strategic objectives to guide short and medium term goals
Dr Paul Rowland
Interim Pro Vice-Chancellor (Engagement, Strategy and Quality)
University of Western Sydney

2:50  Afternoon tea & networking

**Opportunities for shared services across the sector**

3:20  Shared services across universities
- What services can universities realistically share?
- Overcoming the barriers to shared services, including risk and cost
Facilitated by Chair
Harry Banga
The University of Sydney
Jessica Lightfoot
Monash University

4:00  Collaboration across universities in procurement
- Opportunities presented by procuring a wide range of goods & services as a cluster of universities
- Generating leverage, standardisation and aggregation of effort through shared procurement
Harry Banga
Former Chief Procurement Officer
The University of Sydney

4:40  Closing remarks from the Chair & close of conference
How to improve productivity within your university
Pre Conference Workshop A
Tuesday 25th March 2014, 5:00pm – 8:00pm

As universities are vast and complex organisations, there are numerous options to improve the productivity of operations. Ensuring your institution is streamlined across the whole university is crucial for improving efficiency and reducing costs. This workshop will examine strategies to improve productivity.

Key themes include:
- Identifying areas to reduce costs through thorough analysis of operations
- Streamlined staffing models
- Centralising operations to reduce duplication

What you will take away from this workshop:
- Evaluate where you can make savings across operations
- How to implement new strategies and gain buy-in
- Drive change for improved productivity

About your workshop leader:

Professor Peter Rathjen
Vice-Chancellor
University of Tasmania
Visit www.uniresourceplanning.com for full bio.

How to achieve long-term financial sustainability
Mid Conference Workshop B
Wednesday 26th March 2014, 5:00pm – 8:00pm

There are many aspects to financial sustainability for universities, and the interdependence of all elements ensures they must be working in harmony to achieve long-term sustainability within a university.

This workshop will examine the below questions, and will include discussions on potential strategies and tools to tackle these challenges:
1. What is Long Term Financial Sustainability in a University Environment – Looking ahead
2. Building the case for action
3. Convincing “them” there is a problem – even in a surplus environment
4. How to manage in a volatile environment

About your workshop leaders:

Pranay Lodhiya
Chief Financial Officer
La Trobe University
Visit www.uniresourceplanning.com for full bio.

How to combine long-term strategy with budgeting
Post Conference Workshop C
Friday 28th March 2014, 8:00am – 12:00pm

By keeping the big picture in mind, not only can you invite strategic thinking, you embed it in one of the most powerful, pervasive mechanisms: the budget. From there keeping track of performance and changing direction becomes faster and always strategic.

In this session, design an integrated budget that takes into account:
- Risk management
- Capital expenditure
- Operations
- Strategic initiatives
- Workforce planning

Key take-aways:
- Efficient planning to fully integrate the business plan and the budget
- How to combine the design process of each to achieve alignment

About your workshop leader:

Michelle Clarke
Chief Financial Officer
University of New England
Visit www.uniresourceplanning.com for full bio.
Registration Page

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Venue
L’Aqua
Rooftop Level, Cockle Bay Wharf,
Sydney NSW 2000

Accommodation
ParkRoyal Darling Harbour
150 Day Street, Sydney NSW 2000
+61 2 9261 1188
Quote ‘247974’ to receive your discounted rate!

Delegate Details

Please complete: (Please photocopy for additional delegates)

DELEGATE ONE

Delegate Forename: ________________________________
Delegate Surname: ________________________________
Job Title: ___________________________________________________________________
Department/Branch: ___________________________________________________________________
Company/Organisation: ___________________________________________________________________
Email: ___________________________________________________________________
Telephone: ___________________________________________________________________
Fax: ___________________________________________________________________
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