

# UC Budget & Planning Retreat

## Agenda

Wednesday - September 24, 2014

8:00 am to 9:00 am	Breakfast in The Dining Room
9:00 am to 10:30 am	Welcome (again) and guest speaker - Pineview  Harold Hewitt, Executive Vice President & COO of Chapman University and President of WACUBO
10:30 am to 10:50 am	Break
10:50 am to Noon	Concurrent Sessions #1 "UC Cost of Instruction Model", Pamela Brown; Skyview #2 "Deferred Maintenance and Renewal: UCSF Needs Assessment and Funding Approach" Robert Rhine; Library #3 "UC Merced: Integrated Planning to Expand a Campus" Dan Feitelberg; Alumni Room
Noon	Lunch - The Dining Room
1:30 pm to 2:45 pm	"Preparing and Using a 10 Year Financial Plan" - Teresa Costantinidis and Laurent Heller - Pineview
2:45 pm to 3:00 pm	Break
3:00 pm to 4:15 pm	"Incentive Based Budget Model - UCD Experience" Kelly Ratliff - Pineview
4:15 pm to 4:30 pm	Break and move on to table topics
4:30 pm to 5:30 pm	Table Topics #1 "Update on UC wide Budget Templates" - Cliff Bowen Pineview  #2 "Assessing Performance through Campus Metrics" Matt Hull - Pineview  #3 "Enrollment Planning & Workload Measurement" Bryce Mason - Pineview  #4 "New Approaches to Managing Faculty Resources" Donna Udahl - Library

#5 “Integration of Campus Capital & Financial Plans”  
Trent Spradling - Library

#6 “Strategies to Increase ICR Effective Rates”  
Paula Milano - Skyview

#7 “Strategies for Long Term Reserve Management”  
Robert Hannahs - Skyview

#8 “Gift Assessment to Support Operations”  
Teresa Costantinidis - Skyview

5:45 pm to 6:30 pm

Social - Tavern

6:30 pm to 8:00 pm

Dinner - Dining Room

8:00 pm to 9:00 pm

Campus Breakout Sessions - find a space on your own  
Rooms available - Skyview, Pineview, Library and Alumni

## Thursday - September 25, 2014

8:00 am to 9:00 am

Breakfast in The Dining Room

9:00 am to 10: 30 am

Video Conference with Nathan Brostrom  
Pineview

10:30 am to 10:50 am

Break

10:50 am to Noon

Concurrent Sessions

#1 “Understanding how to Calculate Cost per Course”  
Maria Anguiano; Alumni

#2 Using Academic Analytics to Promote Faculty  
Productivity” Julian Fernald and Ryan Chernald;  
Tavern

#3 “Campus Change Management Initiatives during Budget  
Model Transitions” Zoanne Nelson and Jon Bain-Chekal;  
Library

Noon

Lunch - The Dining Room

1:30 pm to 3:00 pm

“Strategic Financial Analysis for UC Campuses”  
Steve Olsen; Pineview

3:00 pm to 3:15 pm

Break

3:15 pm to 4:30 pm

Concurrent Sessions

#1 “Technical Aspects of a 10 year Plan”  
Trent Spradling; Library

#2 “Dean’s Dashboard: Incentivizing & Supporting Data  
Driven Academic Resource Allocation Decisions” David  
Attis of EAB; Pineview

#3 “Developing a Collaborative Campus Strategic Planning  
Methodology” Peggy Delaney and Meg Lehr; -Tavern

4:30 pm to 5:30 pm

Free Time

4:30 pm to 6:00 pm

VCPBs meeting - Pineview

5:45 pm to 6:30 pm

Social - Tavern

6:30 pm to 8:00 pm

Dinner - Dining Room

8:00 pm to 9:00 pm

Leadership Panel - hosted by Laurent Heller  
Panelists: Maria Anguiano, Peggy Delaney, Patrick Lenz,  
Steve Olsen; Pineview

9:00 pm to 9:30 pm

Dessert Social - Tavern

## Friday - September 26, 2014

8:00 am to 9:00 am

Breakfast in The Dining Room

9:00 am to 10: 30 am

“Implementing New Budget Systems” Mike Clune, Glyn  
Davies and Laurent Heller; Pineview

10:30 am to 10:50 am

Break

10:50 am to Noon

Concurrent Sessions

#1 “Evolution from State Funds to All Funds Budgeting”,  
Teresa Costantinidis; Pineview

#2 “Program Level Financial Metrics to Support Strategic  
Decision Making” Bryce Mason; Alumni

11:45 am to 1:30 pm

Checkout and Lunch - The Dining Room

