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
5:45 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