

Liquid Learning Higher Education Series Presents the

University Income Diversification

Masterclass 2014

Practical insights for growing income and evolving a best practice funding strategy in a dynamic Higher Education environment

Facilitated by one of the region's leading Higher Education consultants - this unique event will enable University leaders to consider a range of innovative alternative revenue streams and ensure the successful execution of an income diversification strategy.

KEY MASTERCLASS OUTCOMES:

- Understand trends and forecasts for income generation in higher education both in South-East Asia and globally
- Gain insights into innovative funding strategies being utilised by Universities across the Asia-Pacific
- Build a successful income diversification strategy and understand the steps required for successful implementation
- Discover how to extract value from core University programs, assets and strengths
- Smart positioning: Improving the University's quality, attractiveness, reputation and ranking as a strong platform for income growth
- Consider a variety of innovative alternative income streams in order to build a diversified income portfolio
- Build international revenue growth and understand the risks and opportunities with international income diversification
- Take away tools to identify and manage risk and maximise safe rewards for sustainable academic operations
- Embed your diversification strategy into the overall academic strategy and mission of the institution to support financial sustainability

EXPERT INTERNATIONAL FACILITATOR



Emeritus Professor David Wilmoth PhD; BEcon(Hons) MATP
Founder and Director
Learning Cities International Pty Ltd

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University Income Diversification Masterclass 2014

MASTERCLASS BACKGROUND

The internationalisation of higher education, greater marketplace competition and the backdrop of funding reform are resulting in less certainty over revenue for many institutions. In this dynamic operating environment Universities are rapidly evolving their funding strategies, adopting more diversified income portfolios and shifting to a more commercial mindset in order to ensure financial sustainability and the delivery of growth and key institutional outcomes. The management of this paradigm shift requires a unique combination of high-level skills in order to successfully evaluate the risks and opportunities of alternative revenue generation methods, assess and extract value from core assets and institutional strengths, lead institution-wide change and integrate innovative funding strategies into the overall academic strategy and mission of the institution.

Facilitated by a leading Higher Education consultant with a wealth of experience working with University's on these unique issues - this practical event will enable University leaders to consider a range of ways in which they can evolve their funding strategy. Attendees will understand innovative revenue generation methods utilised by Universities around the region, learn how to assess and leverage existing assets for enhanced incomes and take away practical insights for leading change and ensuring the successful execution of an income diversification strategy.

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 of 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 subject outcomes and implementation problems

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 seminar has limited places to allow for customisation, greater interactivity and for individual concerns to be addressed.

WHO WILL ATTEND

Senior Management and Professionals in Universities from around the region in roles spanning from:

- Vice Chancellor
- Deputy Vice Chancellor
- Bursary / CFO / Treasury / Finance
- Business / Corporate Planning and Analysis
- Corporate Services
- Funding and Grants
- Partnerships and Collaboration
- Advancement
- Research Strategy and Innovation
- Dean / School / Faculty Head
- Marketing and Communications / Branding
- Student Outreach and Recruitment
- International Affairs and Engagement
- Alumni Relations
- IP and Commercialisation

WORKSHOP SCHEDULE

- 8.30 - 9.00 Registration
- 9.00 - 10.40 Session
- 10.40 - 11.00 Morning Tea
- 11.00 - 12.30 Session
- 12.30 - 1.30 Lunch
- 1.30 - 3.00 Session
- 3.00 - 3.20 Afternoon Tea
- 3.20 - 5.00 Session
- 5.00 Close of Seminar

INTRODUCING YOUR EXPERT INTERNATIONAL FACILITATOR



Emeritus Professor David Wilmoth PhD; BEcon(Hons) MATP
Founder and Director
Learning Cities International Pty Ltd

Professor David Wilmoth is one of the region's leading higher education specialists having worked with the higher and further education sector for more than 20 years. He is an expert in the development of new income streams and has worked on University commercial financing in all the major ASEAN and East Asian countries. He has hands-on experience and case studies on all the dimensions of University diversification: fee-paying including international students, student loan schemes, commercial subsidiaries and spinoffs, debt instruments, public private partnerships, philanthropy, gifts and fundraising campaigns, business partnerships, ancillary University services, tax-effective University governance, extraction of value from idle campus assets, technology precincts and science parks, more effective public funding both block grants and competitive, research and development contracts and partnerships.

He has assisted a large number of tertiary institutions to adopt a more commercial approach to management and devised several new University funding frameworks in Malaysia, Vietnam, Indonesia, Papua New Guinea and Australia. David is also a regular key speaker and workshop facilitator on educational management across Malaysia, Vietnam, Singapore, China, Central Asia, India and Australia.

A few of the key projects which Professor David has worked on in his career include:

As Director of Learning Cities International, David specifically has worked on a range of projects in the South East Asian and East Asian region. In particular, he led and consulted several major Universities in Vietnam on their start-up venture strategy, business plans, quality assurance, institutional development and international partnership, as well as fundraising strategy. He was also involved in marketing and reviewing the financial viability for an international University in Central Asia. One of his recent major projects involved consulting and reviewing prospective mergers and acquisitions for various private Universities in Indonesia.

Prior to establishing his own consultancy firm, David was the Deputy Vice-Chancellor for RMIT University. His roles at RMIT during that period involved leading academic rationalisation following the mergers of several vocational education and training colleges. He was also responsible for the University's international programs, where his efforts led to an increase of international students, making RMIT the largest on-campus provider of international tertiary education in the world.

With his extensive contributions to the growth of RMIT, he was appointed as the Executive Director of Strategic Projects of RMIT, and the Founding CEO for RMIT International University. In this role David has established one of the first international Universities in Vietnam with several campuses in different provinces, which is now the world's largest international branch campus with over 6000 students. He was also involved in the development of the University's fundraising strategy where he successfully raised more than USD 30 million in their philanthropic grants.

Besides that, David was appointed as the Managing Director for RMIT International Pty Ltd and RMIT Malaysia Sdn Bhd. He was involved in the development of RMIT campuses sites in Malaysia, China and Vietnam. His expertise in the Asia higher education environment provided him the opportunity to lead the establishment of a new campus in Penang, Malaysia.

His international work for a sustainable higher education institution gained recognition when he was invited by the World Bank to participate in several major development assignments in China and Vietnam.

After his tenure at RMIT, David was the CEO and Director for Monash College Pty Ltd, where he managed a major University commercial education enterprise with branches and partnership in Malaysia, Singapore, Indonesia and China. With his vast experience and knowledge, David has brought a significant increase to Monash College's operational profit.

David graduated with a degree in economics and planning from the University of Queensland and a Master of Town and Country Planning from the University of Sydney. He also received a PhD from the University of California, Berkeley. Currently, he is a Fellow at the Australian Institute of Management.

VALUE PLUS DISCOUNTS

Receive \$300 off registration if you book and pay by 22 November 2013

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Alternative funding – The changing landscape of income generation for higher education

- An overview of current trends and forecasts for income generation in higher education globally and in the Southeast Asia region
- What is driving higher education institutions to diversify? What directions are they taking? What is working and what is not? - A participatory review of the key funding drivers
- Common challenges and obstacles to diversification
- How some higher education institutions are seizing opportunities and breaking down barriers, positioning for success

Taking the first step – Building a quality funding strategy from the ground up

- Understanding the elements of a successful income diversification strategy and the steps to create one
- Mapping the funding environment, external opportunities and constraints
- Monetising your assets – Evaluating your institution and identifying assets and strengths that can lead to new revenue streams
- Identifying opportunities in core University programs – Teaching and learning, research and development, and the ‘third sector’ of engagement
- Opening up alternatives – Standard and ‘out of the box’ solutions to diversification.
- One size does not fit all- Creating new directions for income consistent with University mission

Interactive Group Exercise: Key challenges and solutions for developing a strong funding agenda.

Extracting value from core University programs

- Education and training: Profitable diversification by creating new fields of study and educational partnerships; telling when diversity is too much
- The world of fees and charges, domestic and international: Making money by finding new sources without compromise to quality
- Research and development: Getting the settings right for profitable partnerships and winning competitive funding; uncovering hidden sources of support
- Financially sustainable engagement: Identifying new means of paying for community, business and professional engagement without spreading too thin such as useful non-financial resources on offer (e.g. equipment)
- Maximising government funding: University positioning to sustain core funding
- Smart positioning: Improving the University’s quality, attractiveness, reputation and ranking as a strong platform for income growth

Responsible and profitable commercialisation

- Charting the opportunities and setting priorities- A full menu of possibilities in diverse Southeast Asia
- Making Universities attractive as industry partners, and standing out from the competition
- Ensuring the institution’s corporate structure and governance are conducive and making the right reforms: Realising University commercial benefits and avoiding diversion from other goals
- How to spin off companies and ventures for the benefit of the University
- Creating and retaining a portfolio of commercial subsidiaries: Outsourcing and entering into joint ventures and public-private partnerships
- Ancillary businesses for housing, service concessions and attracting associated businesses
- Pricing fees and charges without losing customer support
- Developing an integrated strategy for management and exploitation of all intangible assets
- Reviewing what makes an entrepreneurial University, identifying which ones are relevant comparators and becoming an entrepreneurial University

Case study: Successful stories of Universities managing profitable partnerships and collaboration

Friending and fundraising: how to be the University of choice

- Strategies and tactics for philanthropy – Creating a sustainable flow of gifts, bequests and investments
- How to form a University advancement strategy and its core components. Best practices in campaign design and delivery
- Preparing win-win case statements for major gifts and getting to ‘Yes’; effective negotiation and communication skills for sustainable partnerships
- The pros and cons of University foundations and alternative governance
- Aligning the whole University, its leaders, staff, alumni and partners to a culture of philanthropy

Case studies: Two successful emerging and mature University fundraising strategies

Building a strong balance sheet

- Scoping University assets including campuses and investments
- Extracting value from underutilised assets
- Joint ventures, and outsourced campus development and operations for real and virtual assets
- Diversification through mergers and acquisitions; divestment for diversity
- Business and science parks, incubators and innovation services

Workshop: How to enter into a successful public-private partnership

Internationalisation and income diversification

- Internationalisation and financial diversification: Dangers and opportunities
- Fee-paying students on campus, offshore and online
- Risks and returns from twinning, point programs, branch campuses, franchises and licencing and the features of successful deals
- Sustainable international revenue raising under fluctuating demand and in unstable financial conditions
- Benchmarking clubs and partnerships for income diversification- What model is best for your University and where is its best practice
- Yoking international service and cooperation and exchange agreements, and international higher education associations, to the diversification strategy

Case study: International revenue growth

Your roadmap for successful implementation

- Income diversification as part of wider University planning and development- Embedding diversification strategy in the overall academic strategy and mission of the institution to support financial sustainability
- Getting all the University settings right
- Stopping the leaks- Moonlighting, fraud and probity management
- Empowering staff and fostering entrepreneurial culture; capacity building for diversification

Identifying and managing risk and maximising safe rewards

- Risk management as a positive tool for financial diversification; concepts of inherent risk and residual risk
- Implementing cost effective risk-based controls for sustainable academic operations
- Integrating risk management into your existing funding strategies
- The risks of under- and over-diversification of finances; the role of risk management in diversification priority-setting
- Handling market and financial uncertainty and volatility- Good risk management for University investments and finances
- The importance of exit strategies for major initiatives

Workshop: Profiting from your University risk register

Reviewing course take-away points

- Discussing the key points for developing strong income diversification portfolios
- Preparing for the future – forward-looking strategies for income generation in an increasingly-complex higher education environment
- Key challenges and solutions looking into new income revenue projects of the future

University Income Diversification

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18 & 19 February 2014

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