

# HIGHER EDUCATION STRATEGIC FINANCE & RESOURCE EFFICIENCY SUMMIT

BEST PRACTISE TECHNIQUES TO INFORM STRATEGIC THINKING & ENHANCE FINANCIAL PERFORMANCE



11 - 14 MAY 2020  
PULLMAN QUAY GRAND  
SYDNEY HARBOUR

## LEARN FROM



**Wayne Andrews**  
Chief Financial Officer



**Narelle Pearse**  
Deputy Vice Chancellor,  
Finance & Planning



**Richard Porter**  
Chief Financial Officer



**Karma Auden**  
Director Finance & Business Services



**Sean Lee**  
Director,  
Enterprise Data & Analytics



**Kelvin Peuser**  
Vice President,  
Finance  
Infrastructure & Risk



**Omer Yezdani**  
Director, Office  
of Planning  
& Strategic  
Management



**Daniel Chew**  
Head of Finance  
Systems & Projects



**Adrian Plumb**  
Associate Director  
of Financial  
Planning & Analysis



**Donelle Claudianos**  
Interim General  
Manager



**Anna Mallett**  
Finance, Resources  
& Planning  
Manager, Faculty  
of Arts



**Diane Green**  
Director, Central  
Services University  
Library



**Anthony Bosisto**  
Intelligent  
Automation  
Industry Leader,  
Tutor & Mentor



**Phillip Neal**  
Head of Group  
Financial Planning  
& Analysis



**Justin Bokor**  
Independent  
Strategy & Growth  
Advisor

**Justin Bokor**  
Advisory



**Cheryl Alderman**  
Executive &  
Business Coach

**Be Ultimate**  
Coaching &  
Training

## CONTACT US

Call +61 2 8239 9711  
Use Code - I

## EVENT PARTNERS



# FUTURE-PROOF YOUR FINANCE CAPABILITY

Higher education contributes tremendously to the Australian economy. The public perceives universities as necessary, but favour funding for big-ticket divisions like health or defence. As a result, universities lose out, as the public fails to see the value tertiary institutions contribute to the broader economy.

Simultaneously, a changing job market, declining world reputation, digital delivery and budget constraints leave the Australian higher education system at a juncture in its evolution. Universities are grappling with how to sell themselves in a globally competitive and financially constrained climate.

To rise to these competing demands, you must have a firm grounding on the financials to operate more like a business partner, which is crucial for building an informed strategy in light of ongoing uncertainty.

This summit gives you the chance to engage with the latest issues facing finance functions, as you hear perspectives from around Australia on how to tackle these issues and drive success.

- ▶ **Understand** how automation is driving efficiency & affecting skills
- ▶ **Strategic** tools for budgeting, forecasting & planning
- ▶ **Articulate** value fluently in financial & non-financial terms
- ▶ **Learn** best practise techniques to inform strategic thinking

## Book and Save

### VALUE PLUS

Save up to \$800

Book before 21 February 2020

### SUPER SAVER

Save up to \$500

Book before 18 March 2020

### EARLY BIRD

Save up to \$250

Book before 15 April 2020

# PRE-SUMMIT WORKSHOP

11 MAY

## CONVERTING TECHNICAL KNOWLEDGE INTO STRATEGIC VALUE

Your ability to bring information together and communicate financial reports to non-financial people can be one of the biggest challenges you'll face. With a weakening international market, more universities are competing for fewer students. Success now hinges on a fusion of technical expertise and leadership vision.

This intensive workshop will provide you with the strategies to develop your strategic thinking capabilities and align these with organisational strategy. You will gain a deeper understanding of how to thrive in a globally competitive, fast-moving and financially constrained climate.

### Working tactically, strategically and practically

- ▶ Identify the strategic drivers of financial and non-financial performance
- ▶ Strategic analysis to provide insightful evaluation
- ▶ Enable transformation using business models and processes

### Developing and selecting meaningful measures and KPIs

- ▶ Focus on what is worth measuring
- ▶ Ensure strategic measures and KPIs are aligned and integrated across business units
- ▶ Involve stakeholders in the process and facilitate performance conversations

### Presenting data and information in visually attractive and informative ways

- ▶ Data volume, velocity, richness and integrity
- ▶ Understand the numbers – The critical math behind statistics, scale and percentages
- ▶ Consider the most appropriate visualisation – Presentation mode, frequency, legibility, colour, scale and context

### Transform your team into a cross-functional, valued finance business partner

- ▶ Communicate as a strategic business partner
- ▶ Convert knowledge into profit
- ▶ Build a high-performance culture and demonstrate accountability for performance

## EXPERT FACILITATOR

**Nicole Robertson**

Management Consultant and Trainer  
Capital Training College

**BOOK  
NOW**

Visit  
[www.liquidlearning.com](http://www.liquidlearning.com)

Call  
+61 2 8239 9711

## CREATE AN INNOVATION-LED FINANCE FUNCTION

KEYNOTE 9:00 - 9:50

As Australia's 'first university' and a world-leading institution, the University of Sydney continues to thrive by using automation to improve service levels and deliver better experiences for its 20,000 staff and 70,000 students.

Over the last year, Wayne launched a passion project: The Automation and Innovation Hub Incubator, which received a Blue Prism global prize for robotics start-up of the year 2020. Wayne will share his experience bringing the Board on a journey of long-term planning and financing for the University on a 2030 time horizon, leading a root and branch transformation across the University's fragmented human capital, systems and processes.

**Wayne Andrews**  
Chief Financial Officer  
**The University of Sydney**



## FINANCIAL RESILIENCE FOR THE FUTURE

EXPERT COMMENTARY 9:50 - 10:40

Public universities in Australia occupy a unique position from a financial perspective. On paper, they're set up as a not-for-profit, though they need to generate consistent operating surpluses to sustain their operations and investments. If you look at the financial resilience of different universities, you can learn a lot about the sector. Understanding this helps you model the impact of future scenarios on universities' finances.

**Justin Bokor**  
Independent Strategy & Growth Advisor  
**Justin Bokor Advisory**

**MORNING TEA** 10:40 - 10:55

## UNDERSTANDING DATA FOR BETTER ANALYSIS - PERSPECTIVES FROM SWINBURNE UNIVERSITY

CASE STUDY 10:55 - 11:55

Most organisations understand the immediate value of data capturing and analytics, which is why universities are beginning to shift as they look for more opportunities to thrive. Our speaker will share their extensive experience building a data culture and reporting capability from scratch to help you gain a deeper understanding of its importance.

TBA

## STRATEGICALLY ADAPTING TO MARKET CHANGES IN HIGHER EDUCATION

CASE STUDY 11:55 - 12:45

The pressure is on to deliver sharper cost efficiencies. Finance professionals have been called to step up as strategic business partners and exert influence over leaner, dynamic business models. While changes in higher education bring opportunities for innovation, change also welcomes risk. Narelle will outline some useful strategies for responding to risk from a financial perspective.

**Narelle Pearse**  
Deputy Vice Chancellor, Finance & Planning  
**CQUniversity**



**LUNCH** 12:45 - 1:45

## IT ALL ADDS UP - THE VALUE OF STRENGTHENING YOUR SKILLS TO ENCOURAGE STAKEHOLDER BUY-IN

PANEL 1:45 - 2:35

Your stakeholders will determine if you and your project thrive. The good news is that you are in control. Stakeholder engagement will help motivate, direct and lead expectations towards appreciation and support of your work. Technical excellence is essential - you still have to deliver the 'right outputs' in the 'right way', but achieving this is helped enormously by building and leading a motivated project team, and creating a supportive and helpful cadre of senior stakeholders.

**Donelle Claudianos**  
Interim General Manager  
**Australian National University**



**Kelvin Peuser**  
Vice President, Finance Infrastructure & Risk  
**Avondale University College**



**Narelle Pearse**  
Deputy Vice Chancellor, Finance & Planning  
**CQUniversity**



**Karma Auden**  
Director Finance & Business Services  
**University of Canberra**



**Phillip Neal**  
Head of Group Financial Planning & Analysis  
**Macquarie University**



## TRANSFORMING ACU'S BUSINESS INTELLIGENCE CAPABILITY

CASE STUDY 2:35 - 3:25

Early on in ACU's Business Intelligence (BI) transformation, they learned a lesson: it's not about tech - it's about people. Technology and data are the new tools of strategic planning, but decision-makers require convincing. What is the ROI? What are the risks? At the outset, the problem is often poorly defined. It takes skill and genuine engagement with people to understand what is required, creativity to prototype a suitable fit and the necessary smarts to get things right. Data-driven decision making doesn't mean sacrificing good governance, and it doesn't mean leaving decisions entirely to a machine.

**Omer Yezdani** Director, Office of Planning & Strategic Management  
**Australian Catholic University**



**AFTERNOON TEA** 3:25 - 3:40

## THE ART OF STORYTELLING - A NEW BUT CRUCIAL SKILL FOR FINANCE & ACCOUNTING PROFESSIONALS

CASE STUDY 3:40 - 4:30

As we move into an era of automation and digitisation, there's an ever-growing need to analyse and interpret data. You likely weren't taught how to communicate numbers, which is why Karma is on a quest to bring storytelling into the profession. Karma can guide you on how to translate and interpret numbers for those who find them dull and confusing, supporting you in achieving stakeholder buy-in and making strategic, informed business decisions.

**Karma Auden**  
Director Finance & Business Services  
**University of Canberra**



**DRINKS & CANAPÉS** 4:30 - 5:30

Continue to network while you enjoy complimentary refreshments.

## A LEADER'S VIEW ON THE FUTURE OF FINANCE

KEYNOTE

9:00 - 9:50

Higher education has a rich and long-standing history in Australia's education, research and innovation system. However, as public colleges and universities are becoming more relevant than ever in our knowledge-intensive society, many have come under intense financial pressure to do more with less. Join Richard as he helps you gain a deeper understanding of the forward-focus on higher education finance from a leader's perspective.

**Richard Porter**  
Chief Financial Officer  
**Flinders University**



## LEARN HOW TO MAKE INFORMED DECISIONS IN THE FACE OF CONSTANT CHANGE

CASE STUDY

9:50 - 10:40

We're experiencing fundamental shifts in how we live, work and play. While Australia is a global success story, change is constant, so higher education must keep up if it is to remain competitive. Stay up-to-date as Anna shares her insights into how to make informed decisions in a rapidly changing industry.

**Anna Mallett**  
Finance, Resources & Planning  
Manager, Faculty of Arts  
**Monash University**



## MORNING TEA

10:40 - 10:55

## BALANCING FINANCE DEMANDS WITH BUSINESS NEEDS

PANEL

10:55 - 11:55

Commercial and operational agility is often slowed by the need to source data and analyse its value. It may be tedious, but the benefit of reporting is unquestionable. In higher education, commercial challenges like these are among the toughest to overcome. Join our panel as they explore how they have harnessed an abundance of data to deliver successful outcomes.

**Adrian Plumb**  
Associate Director of  
Financial Planning & Analysis  
**Australian National University**



**Diane Green**  
Director, Central Services University Library  
**The University of Sydney**



**Sean Lee**  
Director, Enterprise Data & Analytics  
**RMIT University**



## DEVELOP ANALYTICS SKILLS IN YOUR FINANCE TEAM

CASE STUDY

11:55 - 12:45

Data literacy is the ability to read, write and communicate data in context, including an understanding of data sources and constructs, analytical methods and techniques applied. Stakeholders outside of the finance department must be able to understand the data story. Otherwise, the information is unusable and the value unseeable. The prevalence of data and analytics capabilities requires everyone 'speak data' as a universal language.

Sean specialises in information management, business intelligence, revenue analytics and performance improvement, and can help you understand how to build solid analytics skills in your finance team.

**Sean Lee**  
Director, Enterprise Data & Analytics  
**RMIT University**



## LUNCH

12:45 - 1:45

## THE FUTURE IS HERE - PREPARE FOR THE TRANSITION TO AUTOMATION

EXPERT COMMENTARY

1:45 - 2:35

Higher education is evolving, which means we need to keep pace with change. Intelligent automation can help you can devote more time to high-value tasks and make space for creativity, driving innovation. Join Anthony as he shows you how to use intelligent automation to free time for high-value tasks while guaranteeing consistency in repetitive process work.

**Anthony Bosisto**  
Intelligent Automation  
Industry Leader, Tutor & Mentor  
**Swinburne University of Technology**



## HYPE VS MYTH - HOW TO DEVELOP A ROADMAP FOR FINANCE IN THE DIGITAL WORLD

CASE STUDY

2:35 - 3:25

Not having a technology roadmap is dangerous, so how does a finance department take control of an area driven by IT? A design-thinking intern in the UTS Finance Department researched the hype vs myth of what enabling technologies benefit finance and explored the group ideation process (using Post-Its) to prioritise initiatives, collaborating with internal and external partners and getting stakeholder/team support for the implementation. Explore UTS' journey and discover how you can use enabling tech to solve business problems.

**Daniel Chew**  
Head of Finance Systems & Projects  
**University of Technology Sydney**



## AFTERNOON TEA

3:25 - 3:40

## INVEST IN YOUR SUCCESS

ROUNDTABLE

3:40 - 4:30

Cheryl will summarise the takeaways from the event and help you develop strategies for career progression.

**Cheryl Alderman**  
Executive & Business Coach  
**Be Ultimate Coaching & Training**



## BECOME A SPONSOR

For your chance to brand yourself as a market leader, please call: +61 2 8239 9711 or email: [sponsorship@liquidlearning.com.au](mailto:sponsorship@liquidlearning.com.au)

**PLUS TWO WORKSHOPS!**

Plus two separately bookable interactive workshops before & after the event

# POST-SUMMIT WORKSHOP

14 MAY

## THE FUTURE OF THE HIGHER ED SECTOR & YOUR ROLE AS A FINANCE PROFESSIONAL

Finance professionals are under pressure to do more with less. With the addition of rapid technological change and a vast education landscape, it is essential to keep pace with trends to understand how they are going to impact your organisation. A growth mindset and strategic thinking capabilities will help you excel in your profession and future-proof your skills.

### Prospects for the future of higher education

- ▶ Learn from the past to forecast the future
- ▶ Thrive during mounting financial and sustainability pressures
- ▶ Reliance on the international market

### Play an active role in organisational transformation

- ▶ Higher education vs other sectors - Similarities and differences in transformation
- ▶ Embrace organisational innovation, responsiveness, and adaptation
- ▶ Digital delivery as a challenge and a competitive advantage

### The evolving role of the finance professional

- ▶ From spreadsheets to strategy
- ▶ Build your skills as a strategic business partner
- ▶ Turn data into insightful analysis that assists organisational planning

### Future-proofing your role in higher education and beyond

- ▶ Increase financial resilience for the future
- ▶ What can universities do? What is the role of policy?
- ▶ Develop a forward-thinking view

## EXPERT FACILITATOR

**Justin Bokor**

Independent Strategy & Growth Advisor  
Justin Bokor Advisory

**BOOK  
NOW**

Visit  
[www.liquidlearning.com](http://www.liquidlearning.com)

Call  
+61 2 8239 9711

# WHO WILL ATTEND?

This event will be relevant for anyone looking for the latest insights from experts in data analysis, reporting, budgeting, financial modelling, planning and analysis:

- ▶ Senior Finance Managers
- ▶ Financial Controllers
- ▶ Senior Management Accountants
- ▶ Faculty Managers, Finance Officers
- ▶ Reporting and Analysis Managers
- ▶ Senior Finance Officers
- ▶ Directors of Finance and Business
- ▶ Business Improvement Manager
- ▶ Chief Financial Officers

ALSO AVAILABLE

# HIGHER EDUCATION OPERATIONS PROFESSIONALS LEADERSHIP SUMMIT



23 - 26 MARCH 2020

SYDNEY

