



7 February 2007

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On all bookings confirmed  
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## Embedding full economic costing in HEIs

**The move to sustainability**



**John Newton**  
Assistant Director  
(Costing, Pricing and  
Special Projects),  
Cardiff University.



**David Otley**  
Professor of  
Accounting and  
Management,  
Lancaster University  
Management School.



**Philip Harding**  
Finance Director,  
University of  
Westminster.

Expert speakers include:

**A one day conference to review the impact of full economic costing in Higher Educational Institutions (HEI) since its introduction in 2005.**

See inside for full conference details...

# Embedding full economic costing in HEIs

## The move to sustainability

**Are you involved with strategic planning and the implementation of full economic costing?  
Do you wish to learn more about the current issues relating to implementing full economic costing?**

If you're involved in full economic costing, finance, business planning, project managing costing and pricing projects within HEIs, this one day conference will give you a sound understanding of the key issues, principles and methodology to develop strategies for successful full economic costing in your HEI. Case studies will be used to illustrate real life learnings and the effects of full economic costing.

Experts from leading Higher Education Institutions will:

- Review the effect of full economic costing on research administration at the University of Liverpool.
- Discuss the full economic costing and the strategic implications for a teaching-intensive HEI.
- Discuss TRAC guidance, quality assurance, validation and acceptance by funders.
- Look at the effect of full economic costing on school strategy and processes.
- Provide their perspectives on sustainability and the use of metrics, full economic costing and monitoring at Imperial.

Please note that this conference covers full economic costing in HEIs. It will be followed by a pricing conference for HEIs in the autumn. Details will be confirmed at a later date.

## Learn from the leading experts



**John Newton FCMA, Conference Chair and Assistant Director (Costing, Pricing and Special Projects), Cardiff University**

John was seconded to the Joint Costing and Pricing Steering Group 2002-2005 and worked with HEIs to ensure full economic costing was implemented. He has played a key role in developing training courses in all aspects of costing and pricing, helping institutions develop strategies and good practice. John has

in-depth knowledge and experience of HE, having worked in the sector for 25 years.



**Colin Cooper, Assistant Director of Research, University of Liverpool**

Colin has extensive university experience in research and consultancy administration in the university sector. He has been co-chair of the international committee of the Society of Research Administrators and in this capacity was instrumental in setting up the International Network of Research Management Societies (INORMS). He has been actively involved as a presenter/trainer for the

European Association of Research Managers and Administrators (EARMA), the Association of Research Managers and Administrators (ARMA) and the British Universities Finance Directors Group (BUFDG), where he played a key role in its pricing seminars in 2005.

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**Ian Carter, Director of Research, Research and Business Services,  
University of Liverpool**

Ian is responsible for the research portfolio, including the University's research strategy and policy development, oversight of all externally-funded research and knowledge transfer as Head of Research and Business Services. He is currently playing a leading role in the introduction of full economic costing, and is also involved in the RAE process. He sits on the Research Councils' Joint Grants Processing Steering Group and was a member of the Research Councils' Dual Support Reform Project Board. He is the Chair of the Association of Research Managers and Administrators (UK), and is a leading member of the Brunswick Group.



**Philip Harding, Finance Director, University of Westminster**

Philip is also Chair of BUFDG and an FE College governor. His previous career included 3 years as Finance Director at the University of Luton, 6 years in the NHS at Trust Board Director Level and a variety of roles in the commercial sector including periods at BP and Prudential. He is a professionally qualified accountant (FCMA).



**Jon Gorringe, Director of Finance, University of Edinburgh**

Jon was appointed as Director of Finance in 2005, prior to which he was Director of Finance at both the Universities of Leicester and Essex. Jon has had a long involvement with costing and pricing in universities. He was involved in the early work in the 1980's to help adopt the Ministry of Defence's costing methodology for use in the University sector. With the ending of the task of JCPSG in designing and bringing to implementation FEC in universities Jon has taken on the Chair of the successor organisation, the BUFDG Costing and Pricing Group.



**Professor David Otley, Professor of Accounting and Management,  
Lancaster University Management School**

David is an expert speaker for the CIMA Mastercourse programme, and also teaches on full-time and executive MBA programmes. David has researched and published extensively in both academic and practitioner journals in the area of performance management and control systems. He is a member of the management board of the Centre for Management Performance at the ICAEW and is a senior moderator for their Advanced Stage examinations.

**John Green, Chief Co-ordinating Officer, Imperial College**

John is responsible for the co-ordination and integration into College operations of activities and projects that span the faculties and service departments; one such project has been the implementation of FEC and embedding the new processes into the business. Prior to this John was Secretary of the Faculty of Medicine having been responsible for merging five medical schools into Imperial. Before that he was Chief Executive of the Royal Society of Medicine and previously Senior Tutor of Queens' College, Cambridge.

# Embedding full economic costing in The move to sustainability

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## Conference programme

- 9.00 – 9.45am**      **Registration and coffee**
- 9.45 – 10.00am**      **Introduction**  
**Conference chair: John Newton**, Assistant Director (Costing, Pricing and Special Projects), Cardiff University.
- 10.00 – 11.00am**      **The effect of full economic costing on research administration at the University of Liverpool and what is being/should be done.**  
**Colin Cooper**, Assistant Director of Research, University of Liverpool  
**Ian Carter**, Director of Research, Research and Business Services, University of Liverpool.
- 11.00 – 11.20am**      **Coffee**
- 11.20 – 12.00pm**      **Full economic costing and the strategic implications for a teaching-intensive HEI.**  
**Phil Harding**, Director, University of Westminster.  
The integration of the principles of full economic costing with financial and academic decision-making will be considered.
- 12.00 – 12.30pm**      **TRAC guidance, quality assurance, validation and acceptance by funders.**  
**Jon Gorringe**, Director of Finance, University of Edinburgh.  
Update on the work of the BUFDG Costing and Pricing Group with special regard to the consideration of revision and future developments of TRAC guidance. Review of current and future quality assurance and validation requirements by stakeholders and views on the acceptance of full economic costing by funders.
- 12.30 – 1.45pm**      **Lunch**

# HEIs

BLS

| Includes lunch, refreshments and course papers

- 1.45 – 2.30pm**      **The effect of full economic costing on school strategy and associated school processes.**  
**Professor David Otley**, Professor of Accounting and Management, Lancaster University Management School.  
This will include consideration of the effect on behavioural, resource and allocation processes and the impact on setting strategy and processes.
- 2.30 – 3.30pm**      **Sustainability: use of metrics, full economic costing and monitoring at Imperial College.**  
**John Green**, Chief Co-ordinating Officer, Imperial College, assisted by **Katy Sargeant** and **Karen Sergiou**.
- 3.30 – 3.50pm**      **Tea**
- 3.50 – 4.30pm**      **Panel discussion**
- 4.30pm**              **Conference close**

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**[www.cimaglobal.com](http://www.cimaglobal.com)** via the News and Events section, using the search code HEIC.

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