



CONFERENCE

# INTEGRATED STRATEGIC PLANNING AND RESOURCE ALLOCATION

February 23 - 24, 2017

New Orleans, LA

STRATEGY



---

*Learn how to better engage stakeholders on campus to create and implement a strategic plan.*

---

## OVERVIEW

---

Strategic planning at a college or university is difficult work. Institutions are large, complex, and highly decentralized environments. Most institutions tackle strategic planning reluctantly and without meaningfully seeking input and commitment from key stakeholders, which unfortunately leads to plans that are disconnected from budgets and plans that don't get implemented.

Join two leading experts in strategic planning to learn proven techniques necessary to design, organize, and implement a strategic plan that can be successfully and efficiently applied in almost any campus environment. You will also receive a substantial workbook to guide your learning at the event.

**Because of the interactive nature of this program, participation is limited to just 50 registrants.**

## BRING YOUR STRATEGIC PLANNING TEAM

---

Provosts, chief financial officers, chief planning officers, and other cabinet level officials who are charged with stewarding institution-wide planning processes will benefit most from this program. Given their roles in championing the process, we encourage presidents to attend as part of their larger planning team.

## WHAT MAKES THIS PROGRAM DIFFERENT

---

Ultimately, aligning plans, people, and resources is about working collaboratively across departments and divisions. This program will give you the tools and techniques you need to do this in a meaningful way. Our focus is more than creating a beautiful strategic plan; it's about the hard work of implementation to move your institution forward.

[VISIT EVENT PAGE](#)

[www.academicimpressions.com/conference/integrated-strategic-planning-and-resource-allocation-february-2017](http://www.academicimpressions.com/conference/integrated-strategic-planning-and-resource-allocation-february-2017)



## STRATEGIC PLANNING GUIDEBOOK - INCLUDED IN YOUR REGISTRATION

---

Given the focus on tactics and techniques that you can use immediately back on campus, we are including an important resource on planning that is a must-have addition to your professional library.

### ***Collaborative Strategic Planning in Higher Education***

Written by nationally-renowned planning expert and program facilitator, Patrick Sanaghan, this book offers a hands-on guide to facilitating your strategic planning process with a highly credible, internal planning task force. The book is packed with meeting activities and designs that show you how to facilitate difficult and complex conversations and meaningfully engage large numbers of the campus community efficiently.

## LEARNING OUTCOME

---

After participating in this conference, you will be able to better engage stakeholders on campus to create and implement a strategic plan.

## CONTACT US FOR MORE INFORMATION

---

Contact Amit Mrig, President and CEO at [Amit@academicimpressions.com](mailto:Amit@academicimpressions.com) or 720-988-1210 if you'd like additional information about the program.

## CPE CREDITS

---

Recommended CPE Credits: 16.5

Program Field of Study: Specialized Knowledge and Applications

Delivery Method: Group-Live

Prerequisites: Participants must be in a position to steward the planning process.

Program Level: Intermediate

Academic Impressions is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Website: [www.nasba.org](http://www.nasba.org)



## AGENDA

---

### THURSDAY, FEBRUARY 23, 2017

8:00 - 8:30 a.m.

**Registration and continental breakfast (included in registration fee)**

8:30 - 9:00 a.m.

**Welcome, introductions, and program walkthrough**

9:00 - 9:30 a.m.

**An Integrated Planning Model to Ensure Implementation**

Institutions must take an integrated approach to aligning plans, people, and resources. We'll begin the program with an overview of how these concepts have been successfully implemented at one institution, and we'll offer an organizing framework that can guide your efforts back on campus.

9:30 - 10:15 a.m.

**A 5-Phase Model for Collaborative and Integrated Planning**

Plans are most often not implemented due to a lack of participation and meaningful engagement of stakeholders in the planning process itself. In this session, you will explore a five-phase model for a highly engaging and inclusive planning process that values transparency, stakeholder engagement, and efficiency.

10:15 - 10:30 a.m.

**Refreshment break**

10:30 - 11:00 a.m.

**Environmental Scanning**

The last ten years have demonstrated just how hard it is to predict the future. So how do you plan for the next ten years when the market is changing so quickly and continuously? In this session, we'll explore a model for scanning the environment for clues to potential futures, helping to build the resilience and adaptability of a campus.

11:00 a.m. - 12:00 p.m.

**Planning Activity: Incorporating Diverse Thinking Styles in Your Planning Effort**

Planning processes are only as effective as the committee or task force that's driving it. Recognizing and leveraging the diverse perspectives and working styles of each member can make the task force's diversity an asset, rather than a liability during the planning effort. In this activity, you will learn simple tools and techniques to build cohesion among this critical group.

12:00 - 1:15 p.m.

**Lunch (included in registration fee)**

1:15 - 1:45 p.m.

**Planning Activity: Reaching Agreement on the Most Critical Elements of the Case**

In this activity, you will be introduced to a case scenario that will be used at various points in the program. The case will help ensure you fully understand how to apply these concepts and replicate these activities at your home institution.

1:45 - 2:30 p.m.

**Leveraging the Campus Community's Knowledge**

Institutions often ignore the collective wisdom of their many stakeholders because it's often difficult, time-consuming, and politically challenging to gather this data. In this session, you will learn how to facilitate a SWOT analysis in a way that reveals honest and useful information for your planning effort.

2:30 - 2:45 p.m.

**Refreshment break**



## AGENDA

---

### THURSDAY, FEBRUARY 23, 2017 (CONTINUED)

2:45 - 3:45 p.m.

#### **Horizon Thinking**

Plans must not only serve the institution well in the near-term, they must position them to succeed over the long-term. In this session, you will learn how to engage the campus community to help identify and anticipate potential events, issues, and trends that are likely to influence your institution over the next five to 10 years.

3:45 - 4:30 p.m.

#### **Distilling the Most Important Information**

Planning committees often generate volumes of data, but struggle with surfacing the most critical information. In this session, you will learn and practice simple techniques for distilling large amounts of information into the most important strategic themes. This practice is not only useful for guiding the planning task force's work, but it can also be used to more effectively engage the campus in important discussions.

4:30 - 5:00 p.m.

#### **Setting the Vision**

Synthesizing all of the data gathered into a multi-year vision for the institution is challenging and politically complex. In this session, you will learn how to create a preferred future for the institution that is reflective of stakeholder input and worthy of their commitment.

5:00 - 5:15 p.m.

#### **Wrap-up and Homework Assignment**

5:15 - 6:15 p.m.

#### **Networking reception (included in registration fee)**

### FRIDAY, FEBRUARY 24, 2016

8:00 - 8:30 a.m.

#### **Continental breakfast (included in registration fee)**

8:30 - 9:00 a.m.

#### **Reflections from Day 1 and Q&A**

9:00 - 10:00 a.m.

#### **Assessing Your Capacity to Implement**

Strategic planning is by nature aspirational and inherently additive. How will you align people's actions with the plan when they already have full plates? Using a validated instrument, you'll assess your institution's capacity to implement across six key dimensions: alignment, decision-making, organizational discipline, collaboration, culture, and engagement.

10:00 - 10:45 a.m.

#### **Implementation Protocols**

The implementation assessment will help identify areas of strength and potential landmines that should be addressed prior to undertaking planning efforts or when plans stall. In this session, we'll explore a number of tools and protocols that you can deploy to address these challenges.

10:45 - 11:00 a.m.

#### **Refreshment break**



## AGENDA

---

### FRIDAY, FEBRUARY 24, 2016 (CONTINUED)

11:00 a.m. - 12:00 p.m.

#### **Integrating Plans with Resource Allocation**

Reallocating resources, or generating new resources, to support institutional priorities is a challenge under the best of circumstances. In this session, we'll explore the process of allocating resources—committee structures, operational plans, decision models, etc. – to help ensure key resources are aligned with the plan's objectives.

12:00 - 1:15 p.m.

#### **Lunch (included in registration fee)**

1:15 - 2:30 p.m.

#### **Measuring Progress and Refreshing Plans**

Most plans don't have clear measures and when they exist, they often measure activities and not outcomes. In this session, we'll explore how an institution uses lead and lag measures to proactively monitor progress on key initiatives. We'll also explore a process to refresh plans when market or economic conditions change.

2:30 - 2:45 p.m.

#### **Refreshment break**

2:45 - 3:15 p.m.

#### **Reflection**

The facilitators will model an activity that can be used as part of your planning process in a variety of settings. In this session, you will use this activity to distill the most important lessons from the past two days.

3:15 - 4:00 p.m.

#### **Next Steps and Action Planning**

With a thought partner, you will identify specific steps that you will take when you return to your campus.

4:00 - 4:30 p.m.

#### **Final Q&A and Program Wrap-Up**



## INSTRUCTORS

---

**Steven Kreidler, Vice President for Administration & Finance, Metropolitan State University of Denver**

Formerly the Executive Vice President for the University of Central Oklahoma, Steve joined MSU Denver in August of 2013. His prior career was in economic development, non-profit management, and fund raising.

His current responsibilities include budget and finance, accounting and audit, talent management, facilities, grants and contracts, extended campus, project management, process transformation, and institutional research. On an interim basis, Steve has been responsible for the MSU Denver Foundation, the MSU Alumni Association, and Athletics.

**Patrick Sanaghan, President, The Sanaghan Group**

Dr. Sanaghan serves as the head of The Sanaghan Group, an organizational firm specializing in leadership development, executive coaching, strategic planning, and leadership transitions. Pat has worked with over 200 campuses and hundreds of organizations in the last twenty-five years. He has taught leadership to thousands of leaders in higher education, and helped over one hundred campuses conduct collaborative, transparent strategic planning processes. He is the co-author/author of six books, numerous articles, and several monographs in the fields of strategic planning, leadership, and change management. His most recent books include: *Collaborative Leadership in Action* and *How to Actually Build an Exceptional Team*.

## TESTIMONIALS

---

*"I have worked with Pat Sanaghan and his collaborative planning process on several campuses. The process works, and most importantly, sets the stage for actually implementing the strategic plan. I Highly recommend the process and the person."*

**- Peter Cimboric, President, Ohio Dominican University**

*"This workshop was excellent in terms of style of presentation (engaging) and value of information presented. I loved the multiple opportunities to practice and the takeaway reading. Well worthwhile!"*

**- Jackie Snodgrass, Vice President of Education, Capilano University**

*"The workshop/conference was an information- and experience-packed three days that added skills, information, and contacts to my toolbox. It was worth my time."*

**- LaVerne Ragster, Past President and Professor of Marine Biology, University Of The Virgin Islands**

*"Excellent combination of theory and practice. Simulations were particularly effective."*

**- Christine Kerlin, Vice President, Everett Community College**

*"The program unraveled the mysteries associated with moving from planning through implementation assessment."*

**- Dan Fitzpatrick, Director of Human Resources, Concord University**

*"The conference has equipped me with some valuable tools for strategic plan implementation."*

**- Dr. Vladimir Briller, Executive Director of Planning and Institutional Research, Pratt Institute**

*"The program provided practical information regarding strategic planning & useful meeting designs to gain input from the community and university. Practical formats for implementation."*

**- Alison Blair, AVP Finance, Simon Fraser University**



OTHERS	VS	ACADEMIC IMPRESSIONS
Typically large annual event		<b>Intimate, workshop-style event with personalized attention</b>
Many concurrent sessions; forcing choice		<b>One focused learning track</b>
Uneven sessions and less outcome-focused, driven by an open call for proposals		<b>Needs-driven</b> and meticulously planned with practical outcomes <ul style="list-style-type: none"> <li>Action plans and next steps to use upon returning to campus</li> <li>Carefully-vetted expert instructors that are also practitioners in the field</li> </ul>
Lecture-based		<b>Learner-centric</b> and designed for interaction and collaboration
Large networking events with vendors		Small-scale opportunity to <b>truly connect with colleagues</b> in the same position at other institutions
Some slide presentations posted online after the event		<b>200+ page workbooks</b> with references, worksheets, articles, templates, exercises, and planning documents

**96%**  
of past attendees would recommend an AI conference to a colleague

**250+**  
and growing of AI member institutions (AI Pro)

**15,000+**  
higher ed professionals served

AI Conference Experiences

Academic Impressions provides valuable exploration of timely and pragmatic challenges to higher education institutions. The combination of impassioned subject matter experts as presenters and means of engaging conference attendees was potent.

- C. Tennent, Associate VP of Facilities Management, University of Saskatchewan

This conference was the complete package: relevant topics, philosophical and practical applications, fantastic speakers, fantastic location. One of the BEST conferences I've ever attended. It is what a conference should be! Full of collaboration, networking and solutions.

- M. Lowe, Associate Professor and General Reference Librarian University of Louisiana at Monroe





## LOCATION

---

February 23 - 24, 2017 :: New Orleans, LA

### HOTEL:

Hyatt Regency New Orleans  
601 Loyola Avenue  
New Orleans, LA 70113

To reserve your room, please call 504-561-1234. Please indicate that you are with the Academic Impressions group to receive the group rate.

### ROOM RATE:

The rate is \$189 for single or double occupancy, plus applicable tax.

### ROOM BLOCK DATES:

A room block has been reserved for the nights of February 22-23 , 2017.

### RATE AVAILABLE UNTIL:

Make your reservations prior to February 1, 2017. There are a limited number of rooms available at the conference rate. Please make your reservations early. Rooms are subject to hotel availability.

### ADDITIONAL INFORMATION:

The Hyatt Regency New Orleans offers you great restaurants, rooms, and unparalleled service. Modern business and meeting facilities, and two restaurants and two bars, plus a full-service Starbucks and 24-hour grab-n-go fresh market means you never have to go outside the hotel for entertainment or business.

The Hyatt Regency is located approximately 15 miles from Louis Armstrong International Airport (MSY) and is conveniently located within walking distance of many of the city's most popular historic sites, entertainment and sports venues, including the neighboring Mercedes Benz Superdome.



PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

## PRICING (CIRCLE ONE)

**Your registration fee includes:** Full access to all conference sessions and materials, breakfast, lunch, and access to the networking reception on Thursday, breakfast and lunch on Friday, as well as refreshments and snacks throughout the conference.

CONFERENCE

Integrated Strategic  
Planning and Resource  
Allocation

\$1,495

### EARLY BIRD PRICING

Postmarked on or before February 3, 2017. For registrations postmarked after February 3, 2017, an additional \$100 fee per registrant applies.

**REGISTER ONLINE** or on the next page.



PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

## CONFERENCE REGISTRATION INFORMATION

Print Name | Job Title

Institution/Organization

What name do you prefer on your name badge? | Address

City | State/Province | Zip/Postal Code | Country

Telephone | Email

**IF THIS CONFERENCE PARTICIPANT HAS ANY DIETARY OR ACCESSIBILITY NEEDS, PLEASE LIST THEM IN THE SPACE BELOW. WE WILL DO OUR BEST TO ACCOMMODATE THESE NEEDS.**

Empty space for dietary or accessibility needs.

How did you hear about this event? (email from AI, ACPA, colleague forwarded email, *The Chronicle*, etc.) \_\_\_\_\_

## ADDITIONAL CONTACT INFORMATION

If you would like us to send a copy of your registration confirmation or receipt to someone else, please complete this section

Additional Contact Name | Contact Phone

Additional Contact Email | Additional Contact Title

## EMERGENCY CONTACT INFORMATION

Emergency Contact Name | Emergency Contact Phone



**PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259**

## PAYMENT METHOD

We accept Visa, MasterCard, and American Express credit cards. To pay by check, include the check with this form or select the "invoice me" option. Fax form to 303.221.2259 or mail form along with payment to: Academic Impressions, 4601 DTC Blvd., Ste. 800, Denver, CO 80237

## CREDIT CARD



Name on Card

Account Number

Billing Address

Billing City

Billing State

Billing Zip Code/Postal Code

Exp. Date

Security Code (last 3 digits on the back of Visa and MC or 4 digits on front of AmEx)

**AMOUNT TO CHARGE:** \_\_\_\_\_

## CHECK/INVOICE

My check is included and covers \_\_\_\_\_ registration(s) Check # \_\_\_\_\_

Please invoice me, Purchase Order # \_\_\_\_\_ (PO # not required to receive invoice)

## HIGHER ED IMPACT

Delivered free to your inbox, Higher Ed Impact provides you with a full tool kit to help you monitor and assess the trends and strategic challenges likely to have an impact on your institution's health and competitiveness. (Check the boxes for the editions you would like to sign up for)

**DAILY PULSE** - Scan current events, timely research, and notable practices at other institutions.

**WEEKLY SCAN** - Review the week's most significant events and the most timely research in higher education, with key takeaways suggested by higher education's leading experts.

**DIAGNOSTIC** - Get an enterprise-wide and in-depth look at a current, strategic challenge; identify steps to take and critical questions to address.

List the names of the registrants you'd like to sign up: \_\_\_\_\_

Learn more or sign up to receive Higher Ed Impact at: [www.academicimpressions.com/news-sign-up](http://www.academicimpressions.com/news-sign-up)

*\*Note if you do not provide any names in the above space, all attendees will be signed up for the options selected.*



## CANCELLATION AND REFUND POLICIES



### SATISFACTION PROMISE

We want you to be satisfied with your Academic Impressions learning experience. If the program you purchased fails to meet your expectations, please contact us within 30 days and let us know. We'll credit the full amount you paid toward another AI program that may better fit your needs.

### CONFERENCES

For in-person conferences, substitute registrants are welcome and may be named free of charge at any time. If you cancel 8 weeks or more prior to the first date of the conference, you will receive a full refund, less a \$100.00 service charge per attendee.

If you cancel within 8 weeks of the first date of the conference, you are not entitled to a refund. However, as a courtesy, we will allow you to apply your payment, less the service charge, toward a future purchase within one year from the date you cancel. Your payment is transferable to another person from your institution if you wish.

Please note that if you do not attend and you do not contact us in advance to cancel as described above, you are responsible for the entire payment. In case this event is cancelled, Academic Impressions' liability is limited to a refund of the registration fee only.

### ONLINE TRAININGS CONSISTING OF AT LEAST ONE LIVE TRAINING DATE

You will receive a full refund (less a \$75 service charge) if you cancel 8 weeks or more prior to the first live training date. If you cancel within 8 weeks of the first live training date, you are not entitled to a refund. But as a courtesy, we will apply your payment (less a \$75 service charge) towards a future purchase within one year from the date you cancel. Your payment is transferable to another person from your institution if you wish. You may name a substitute primary participant free of charge at any time prior to the first live training date. If available, you may switch the live training format to a self-paced format (such as a CD-ROM Recording or On-Demand Download) free of charge. (Shipping charges will apply to CD-ROM Recording orders outside the U.S. or Canada.)

### ONLINE TRAININGS WHICH ARE PURELY SELF-PACED

All sales are final. No cancellations or refunds are provided.

### RECORDINGS, ON-DEMAND DOWNLOADS, MONOGRAPHS AND OTHER PUBLICATIONS

All sales are final. No cancellations or refunds provided.