

INTEGRATED STRATEGIC PLANNING AND RESOURCE ALLOCATION

June 11-12, 2012
Houston, TX



“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

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LEARNING OUTCOME

After attending this conference, you will be able to successfully facilitate an integrated collaborative planning and resource allocation process on your campus.

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 (who have assisted more than 100 campuses) in strategic planning and resource allocation to learn proven techniques necessary to design, organize, and implement a planning and resource allocation process that can be successfully and efficiently applied in almost any campus environment.

KEY PROGRAM TAKEAWAYS

This program is right for you if you are looking for practical strategies to:

- Engage the campus community in the planning effort
- Build trust by using an open and transparent planning process
- Plan efficiently
- Fund your strategic plan
- Allocate resources in ways that are consistent with established priorities and institutional values

WHO SHOULD ATTEND

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 role in championing the process, we encourage presidents to attend as part of their larger planning team.

Because of the highly interactive nature of this program, participation is limited.

A UNIQUE, HANDS-ON FORMAT

This is a highly immersive program in which you will engage in active learning. At the event, you'll work with case examples and simulate different planning activities that you can replicate back on campus. With a focus on practice and application, you'll leave this program with the tools, processes, and skills to meaningfully engage stakeholders on campus.

BUILD YOUR PROFESSIONAL LIBRARY – 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.

**Learn the tools
and techniques
needed to lead
a collaborative,
integrated
planning and
budgeting
process.**

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AGENDA

MONDAY, JUNE 11, 2012

- 8:00 – 8:30 a.m. **Registration and Continental Breakfast (included in registration)**
- 8:30 – 9:00 a.m. **Welcome, Introductions, and Program Walkthrough**
- 9:00 – 9:30 a.m. **An Integrated Planning and Resource Allocation Model**
Institutions must take an integrated approach to planning, resource allocation, and assessment. We'll begin the program with an overview of these concepts and how they're linked, and we'll offer an organizing framework that can guide your efforts back on campus.
- 9:30 – 10:30 a.m. **A Five-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.
- 10:30 – 10:45 a.m. **Break**
- 10:45 – 11:45 a.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 tools and techniques that enable you to seek out and effectively manage diverse perspectives.
- 11:45 a.m. – 12:15 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.
- 12:15 – 1:15 p.m. **Lunch (included in registration fee)**
- 1:15 – 2:00 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.
- 2:00 – 3:15 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.
- 3:15 – 3:30 p.m. **Refreshment Break (included in registration fee)**
- 3:30 – 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)**

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TUESDAY, JUNE 12, 2012

- 8:00 – 8:30 a.m. **Continental Breakfast (included in registration fee)**
- 8:30 – 9:30 a.m. **Aligning Resources with Plans**
The key to effective execution of your plan is to ensure that your resources are aligned with your top priorities. This will inevitably require making difficult choices about people and dollars. In this session, you will learn to diagnose your culture of allocating resources and how to operationalize and resource your plan in a transparent and credible way.
- 9:30 – 9:45 a.m. **Break**
- 9:45 – 11:00 a.m. **Strategic Resource Reallocation**
Strategic planning is inherently aspirational and therefore tends to be additive. Most institutions will have to stop doing some things in order to free up the resources needed for new priorities. In this session, you will learn about a proven model for resource reallocation that works across both academic programs and administrative functions.
- 11:00 a.m. – 12:30 p.m. **Exploring Existing Research and Best Practices**
In this interactive session, you will share key takeaways from the articles you read the previous evening. The articles highlight concepts that have critical implications for effective planning and resource allocation. This collaborative activity models a powerful way to build group expertise efficiently and effectively and can be used back on campus to inform stakeholders in the planning process.
- 12:30 – 1:30 p.m. **Lunch (included in registration fee)**
- 1:30 – 2:15 p.m. **Exploring Existing Research and Best Practices (cont.)**
- 2:15 – 2:45 p.m. **Concurrent Session: Planning Tools and Budget Models**
In this session, you will have a choice of learning about two additional planning tools or exploring different budget models in more depth. The planning tools will help your institution assess your capacity for collaborative and effective planning. The budget models will provide further insights and options for allocating resources in a way that fits your institution's size, scope, and needs.
- 2:45 – 3:00 p.m. **Refreshment Break**
- 3:00 – 3:30 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.
- 3:30 – 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 Wrap-up**

CPE



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Recommended CPE Credits: 15
Specialized Knowledge and Applications: Group-live
Prerequisites: Participants must be in a position to steward the planning process.
Program Level: Intermediate

Upon successful completion of this event, program participants interested in receiving CPE credits will receive a certificate of completion.

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INSTRUCTORS



Larry Goldstein, President, Campus Strategies, LLC

Larry is the president of Campus Strategies, LLC, a higher education management consulting firm. His consulting interests cover a wide range of topics, including higher education budgeting, strategic planning, accounting, and finance. He writes and speaks frequently on these topics. He is the author of *College and University Budgeting: An Introduction for Faculty and Academic Administrators*, and he has co-authored several publications, including *Presidential Transitions*.

Immediately prior to establishing Campus Strategies, LLC, Larry served as senior vice president and treasurer of the National Association of College and University Business Officers (NACUBO). He joined NACUBO after spending 20 years in higher education financial administration. In his last campus position, he served as the University of Louisville's chief financial officer. Before that, he held administrative appointments with The University of Chicago, the School of the Art Institute of Chicago, and the University of Virginia.



Patrick Sanaghan, President, The Sanaghan Group

Pat is the president of The Sanaghan Group, an organizational consulting firm that specializes in strategic planning, leadership development, executive team building, meeting facilitation, and leadership transitions. He has worked in more than 100 organizations and 100 campuses (e.g., Cornell University, DePaul University, the University of the West Indies, Saint Joseph's University, Eastern Illinois University, Central Community College) over the past 25-plus years. He has taught strategic planning to more than 1,000 administrators in higher education.

Pat speaks and writes frequently on leadership and strategic planning. He is the author of numerous articles and has co-authored several books on strategic planning, high-performing teams, and change management. His book *Presidential Transitions* was published by ACE/Praeger in 2007, and his book on collaborative strategic planning was published by NACUBO in 2009. His latest book, *Collaborative Leadership in Action*, was published in 2011, and he is currently writing a book on exceptional leadership in higher education.

HOTEL RESERVATIONS

The conference will be held at:

Omni Houston Hotel
Four Riverway
Houston, TX 77056

To reserve your room, call 713.871.8181. Please indicate that you are with the Academic Impressions group to receive the room rate of \$149 for single or double occupancy, plus applicable tax.

A room block has been reserved for the nights of June 10 & 11, 2012. Reservations must be made by May 21, 2012. There are a limited number of rooms available at the conference rate. Please make your reservations early.

The Omni Houston Hotel is centrally located in the prestigious Uptown Post Oak/Galleria area and is just minutes from all the excitement that Houston has to offer. The hotel is just 10 minutes by car from the central business district and 30 minutes from George Bush Intercontinental Airport (IAH) or 25 minutes from William P Hobby Airport (HOU).



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Questions about the event? Call us at 720.488.6800 to help determine if this event is right for you.

Register online at www.academicimpressions.com

REGISTRATION FEES

Your registration fee includes: full access to all conference sessions and materials, breakfast, lunch, and access to the networking reception on Monday, breakfast and lunch on Tuesday, as well as refreshments and snacks throughout the conference.

Postmarked on or before May 25, 2012

Integrated Strategic Planning and Resource Allocation _____ \$1495 USD
(For registrations postmarked after May 25, 2012, an additional \$100 fee per registrant applies)

Check here if you have any dietary or accessibility needs. Please list any needs in the space below and we will do our best to accommodate you.

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

CONFERENCE REGISTRATION INFORMATION (PLEASE PRINT CLEARLY)

Name _____ Name Preferred for Badge _____

Job Title _____ Institution/Organization _____

Address _____

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

Telephone _____ Fax _____ Email _____

For registration confirmations and pre-conference communication. (FOR ADDITIONAL REGISTRANTS, PLEASE COMPLETE ADDITIONAL FORMS.)

Additional Contact Name _____ Additional Contact Phone _____

Additional Contact Title _____ Additional Contact Email _____

Emergency Contact Name _____ Emergency Contact Phone (day) _____

(In case of emergency, we will contact this person on your behalf) (evening) _____

FREE HIGHER ED NEWS AND ANALYSIS

Academic Impressions is happy to offer *Higher Ed Impact*, a free industry scan of news, trends, and fresh research on higher education, delivered in an easy-to-scan email.

- Sign me up for HEI: *Daily Pulse* – impactful news, trends, and practices, sent daily
- Sign me up for HEI: *Weekly Scan* – the week's most critical news, with analysis of top stories and trends, sent on Fridays
- Sign me up for HEI: *Monthly Diagnostic* – practical takeaways addressing a strategic challenge facing institutions of higher ed, sent 9-12 times/year

PAYMENT METHOD

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

CREDIT CARD

Please charge my credit card: (Visa, MC, AmEx)

Name on Card _____

Account Number _____

Exp. Date _____

Billing Zip Code/Postal Code _____

Security Code (last 3 digits on the back of Visa and MC or

4 digits on front of AmEx) _____

CHECK/INVOICE

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

Please invoice me
Purchase Order # _____
(PO# not required to receive invoice)

REFUND/CANCELLATION POLICY

Refunds will be issued only if cancellations are received in writing by March 16, 2012. A \$100 processing fee will be assessed. After March 16, 2012 a credit (less \$100 processing fee) will be issued. The credit will be valid for 12 months and can be used toward any future conferences, Web conferences, audio proceedings, or Web conference archives. In case this event is cancelled, Academic Impressions' liability is limited to a refund of this registration fee only.