



CONFERENCE

INTEGRATED STRATEGIC PLANNING AND RESOURCE ALLOCATION

January 29 - 30, 2018

Denver, CO



STRATEGY



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

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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 as well as 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 only 50 registrants.

BRING YOUR STRATEGIC PLANNING TEAM

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.

We recommend bringing a team that includes provosts, chief financial officers, chief planning officers, and other cabinet level officials who are charged with stewarding institution-wide planning processes. Given their roles in championing the process, we encourage presidents to attend as part of their larger planning team.

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 copy of Collaborative Strategic Planning in Higher Education with your registration.

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.

[VISIT EVENT PAGE](#)

www.academicimpressions.com/integrated-strategic-planning-and-resource-allocation/



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 or 720-988-1210 if you'd like additional information about the program.

CPE CEDITS

Recommended CPE Credits: 15.0

Program Field of Study: Specialized Knowledge and Applications

Delivery Method: Group-Internet

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



AGENDA

DAY ONE: MONDAY, JANUARY 29, 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 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.

10:15 - 10:30 a.m.

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 rapidly and continuously changing? 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

A planning process is 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.



AGENDA

DAY ONE: MONDAY, JANUARY 29, 2017 (CONTINUED)

2:30 - 2:45 p.m.

Break

2:45 - 3:45 p.m.

Horizon-Thinking

Plans must not only serve the institution well in the near future, they must position it to succeed in the long run. 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 ten 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)

DAY TWO: TUESDAY, JANUARY 30, 2017

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 - 10:30 a.m.

Strategic Plan and Budget Alignment Process

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, new budget request process, timelines, decision models, etcetera—to help ensure key resources are aligned with the plan's objectives.

10:30 - 10:45 a.m.

Break



AGENDA

DAY TWO: TUESDAY, JANUARY 30, 2017 (CONTINUED)

10:45 - 11:15 a.m.

Measuring Progress and Refreshing Plans

Most plans don't have clear measures and, when they do, they often evaluate 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.

11:15 a.m. - 12:15 p.m.

Assessing Your Capacity to Implement

Strategic planning is inherently aspirational and 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.

12:15 - 1:15 p.m.

Lunch (included in registration fee)

1:15 - 2:00 p.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.

2:00 - 2:30 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.

2:30 - 2:45 p.m.

Break

2:45 - 3:30 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.

3:30 - 4:00 p.m.

Final Q&A and Program Wrap-Up



INSTRUCTORS

Steven Kreidler, Vice President for Administration and 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*.



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

January 29 - 30, 2018 :: Denver, CO

HOTEL:

Magnolia Hotel Denver
818 17th Street
Denver, CO 80202

To reserve your room, please call 303.607.9000. Please indicate that you are with the Academic Impressions group to receive the group rate.

ROOM RATE:

The rate is \$149 for single or double occupancy, plus applicable tax.

ROOM BLOCK DATES:

A room block has been reserved for the nights of January 28 and 29, 2018.

RATE AVAILABLE UNTIL:

Make your reservations prior to January 8, 2018. 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:

Comfortable and inviting, the hotel is close to everywhere you want to be, including Coors Field, Mile High Stadium and the Pepsi Center.

TRANSPORTATION:

- Super Shuttle provides transportation from the airport for \$40 per person one way. To make arrangements with Super Shuttle, call 1-800-258-3826.
- Uber / Lyft: Fare is approximately \$40 one-way. Rates will vary.



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 Monday, breakfast and lunch on Tuesday, as well as refreshments and snacks throughout the conference.

CONFERENCE + BOOK	CONFERENCE
Get the Conference as well as the book, Strategic Planning: 5 Tough Questions, 5 Proven Answers by Pat Sanaghan.	Integrated Strategic Planning and Resource Allocation
\$1,595	\$1,495

EARLY BIRD PRICING

Postmarked on or before January 12, 2018. For registrations postmarked after January 12, 2018, 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.

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

**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.