INTEGRATED STRATEGIC PLANNING AND RESOURCE ALLOCATION

January 24-26, 2011
San Antonio, 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
LEARNING OUTCOME
Participants will be able to successfully facilitate an integrated collaborative planning and resource allocation process on their 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
• Allocate resources in ways that are consistent with established priorities and institutional values
• Develop measurable institutional goals that can be assessed

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, registration will be limited.

A UNIQUE, HANDS-ON FORMAT
This is a highly immersive program and offers an active learning opportunity. At the event, you’ll use a multi-faceted case study to apply the lessons learned and grapple with tough planning decisions. You’ll also simulate various 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.
AGENDA
MONDAY, JANUARY 24, 2011

8:00-8:30 a.m.  Registration and Continental Breakfast (included in registration)
8:30-9:00 a.m.  Welcome, Introductions, and Review of Agenda
9:00-10:00 a.m. An Integrated Approach
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.
10:00-10:15 p.m.  Working Break
10:15-11:15 a.m.  Engaged Planning Processes
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 prizes transparency, stakeholder engagement, and efficiency.
11:15 a.m.-12:00 p.m.  Planning Activity: Reaching Agreement on the Most Critical Elements of the case
12:00-1:15 p.m.  Lunch (included in registration)
1:15-2:15 p.m.  Planning Activity: Incorporating Diverse Thinking Styles in Your Planning Effort
2:15-3:15 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 data-gathering activity. You also will conduct a SWOT analysis based on the information provided in the case and the knowledge you bring to the program.
3:15-3:30 p.m.  Refreshment Break (included in registration)
3:30-4:30 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.
4:30-5:00 p.m.  Planning Activity: Considering the Implications of the Horizon Thinking Results on the Case
5:00-5:15 p.m.  Wrap-Up and Homework Assignment
5:15-6:15 p.m.  Networking Reception

TUESDAY, JANUARY 25, 2011

8:00-8:30 a.m.  Continental Breakfast (included in registration)
8:00-8:45 a.m.  What’s on Top?
8:45-10:30 a.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 critical concepts in the areas of planning, resource allocation, assessment, and anticipatory thinking. 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.
AGENDA

TUESDAY, JANUARY 25, 2011 (CONTINUED)

10:30-10:45 a.m.  Refreshment Break (included in registration)
10:45-11:00 a.m.  Planning Activity: Applying Lessons from the Articles to the Case and Discussing Implications for Your Campus’ Planning Effort
11:00-11:45 a.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.
11:45 a.m.-12:30 p.m.  Planning Activity: Selecting the Strategic Themes to be Pursued in the Case
12:30-1:45 p.m.  Lunch (included in registration)
1:45-2:00 p.m.  Setting the Vision
Setting and articulating the vision for the institution is a critical stage in the planning process. In this session, you will learn a tried-and-true process that builds on the data already gathered and engages a diverse set of internal and external stakeholders to define the preferred future for the institution.
2:00-3:00 p.m.  Strategic Resource Allocation
Aligning an institution’s budget with its top priorities results in more effective allocation of limited resources and allows for sustainable progress through a variety of economic conditions. In this session, you will learn key principles and tools required for linking resource allocation decisions with planning priorities.
3:00-3:15 p.m.  Refreshment Break (included in registration)
3:15-4:30 p.m.  Planning Activity: Identifying Strategic Initiatives to Support the Case’s Strategic Themes
4:30-5:00 p.m.  Data-Gathering Techniques
Planning task forces are charged with the enormous task of gathering input and data from hundreds, if not thousands, of campus stakeholders. In this session, you’ll learn about and practice two techniques that allow you to gather input in a disciplined but efficient manner.
5:00-5:15 p.m.  Wrap-Up

WEDNESDAY, JANUARY 26, 2011

8:00-8:30 a.m.  Continental Breakfast (included in registration)
8:30-8:45 a.m.  What’s on Top?
8:45-9:15 a.m.  Planning Tools
In this session, you’ll learn about two important tools to aid your planning process. First, you’ll use a simple tool to assess your institution’s capacity for collaborative and effective planning. The tool is meant to be used with your planning task force and can surface important strengths to build on and weaknesses to manage.

Second, you will work through an exercise designed to surface implementation challenges before you commit to your strategic plan. This type of activity can be instrumental in ensuring successful execution of your plans.
### AGENDA

**WEDNESDAY, JANUARY 26, 2011 (CONTINUED)**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>9:15-9:45 a.m.</td>
<td>Planning Activity: Conducting a Planning Audit and Pre-Mortem Analysis</td>
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<tr>
<td>9:45-10:00 a.m.</td>
<td>Refreshment Break (included in registration)</td>
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<tr>
<td>10:00-11:00 a.m.</td>
<td>Assessment</td>
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<td>Effective assessment is the key to moving from periodic creation of plans to building a culture of planning. Join us to learn how to move from focusing on easy-to-measure outputs to the more significant outcomes institutions seek to achieve. Establishing the desired outcomes as part of the planning process helps enhance the likelihood of successful impacts resulting from your efforts.</td>
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<tr>
<td>11:00-11:30 a.m.</td>
<td>Planning Activity: Moving from Outputs to Outcomes</td>
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<td>11:30 a.m.-12:00 p.m.</td>
<td>Planning Activity: Identifying Outcomes Measures for the Case</td>
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<td>12:00-1:15 p.m.</td>
<td>Working Lunch (included in registration)</td>
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<td>1:15-2:15 p.m.</td>
<td>PowerPoint Presentations</td>
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<td>Your small group will have the opportunity to present your approach to addressing the case scenario, including your strategic themes, initiatives, and outcomes.</td>
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<td>2:15-3:00 p.m.</td>
<td>Anticipatory Thinking</td>
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<td>The planning task force and larger campus community must be able to recognize the moments, emerging trends, and disparate data that could have significant implications for the future. In this session, you will learn how anticipatory thinking can support planning and how to engage campus stakeholders in this critical activity.</td>
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<td>3:00-3:15 p.m.</td>
<td>Refreshment Break (included in registration)</td>
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<td>3:15-4:00 p.m.</td>
<td>Reflection</td>
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<td>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 three days.</td>
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<td>4:00-4:30 p.m.</td>
<td>Next Steps and Action Planning</td>
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<td>With a thought partner, you will identify specific steps that you will take when you return to your campus.</td>
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<td>4:30-5:00 p.m.</td>
<td>Final Q&amp;A and Wrap-Up</td>
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### WHAT YOU NEED TO BRING

Because of the working nature of the program, we recommend that you bring:

- A laptop
- A flash drive to store files

Note: Not all participants will need these items. They will be used in the final day to create and present your group’s PowerPoint presentation.
INSTRUCTORS

Larry Goldstein, President, Campus Strategies
Larry is the president of Campus Strategies, 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, 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 60 campuses over the past 25 years. He has taught strategic planning to more than one thousand 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. His most recent book on collaborative strategic planning was published by NACUBO, and he is currently writing a book on exceptional leadership.

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Recommended CPE Credits:
Main Conference: 26.5
Specialized Knowledge and Applications: Group-live
Prerequisites: Participants must be in a position to steward the planning process.
Program Level: Intermediate

HOTEL RESERVATIONS

The conference will be held at:
Hyatt Regency San Antonio
123 Losoya Street
San Antonio, Texas 78205

To reserve your room, call 210-224-1234. Please indicate that you are with the Academic Impressions group to receive the room rate of $179 for single or double occupancy, plus applicable tax.

A room block has been reserved for the nights of January 23-25, 2011. Reservations must be made by January 3, 2011. There are a limited number of rooms available at the conference rate. Please make your reservations early.

The Hyatt Regency San Antonio is in the heart of the Riverwalk area of San Antonio and is the only Riverwalk hotel directly overlooking the historic Alamo. The hotel is near the best dining and entertainment venues the Riverwalk has to offer and is only 12 miles from the airport.
Attend as a team – remember, if you register as a group, every fourth registrant is free.

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 and Wednesday, as well as refreshments and snacks throughout the conference.

Postmarked on or before January 7, 2011
☐ Integrated Strategic Planning and Resource Allocation $1495 USD
   (For registrations postmarked after January 7, 2011, 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 __________________________
   (In case of emergency, we will contact this person on your behalf)

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. Fax form to 303.741.0849 or mail form along with payment to: Academic Impressions, 4643 S. Ulster St. Ste. 350, 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 October 29, 2010. A $100 processing fee will be assessed. After October 29, 2010 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.