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 even the most skeptical members of your campus community in the planning effort
  • Build trust by using an open and transparent planning process
  • Jump start a stalled planning effort
  • Free-up resources to fund new plan initiatives
  • Allocate resources in ways that are consistent with established priorities and institutional values

LEARNING OUTCOME

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

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 to 50.

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.

**Strategic Planning Monograph**

Register for the Best Value to receive a copy of Strategic Planning: 5 Tough Questions, 5 Proven Answers written by one of our conference presenters, Pat Sanaghan, in addition to your conference registration.

In this monograph Pat shares five difficult questions around strategic planning and presents real-life, practical solutions that have actually worked at real institutions. The monograph also contains more than 30 pages of supplemental resources and exercises that can help you turn his advice to action at your own institution.

Register today!

**TESTIMONIALS**

“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
AGENDA

MONDAY, JANUARY 28, 2013

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 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 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.

10:30 - 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 simple tools and techniques to build cohesion among this critical group.

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)
AGENDA

MONDAY, JANUARY 28, 2013 (CONTINUED)

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 fee)

TUESDAY, JANUARY 29, 2013

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 - 10:45 a.m.  Strategic Resource Allocation
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 allocation that works across both academic programs and administrative functions.

10:45 - 11:00 a.m.  Break

11:00 a.m. - 12:00 p.m.  Operational Planning
Many institutions have compelling visions and strategic plans but don’t engage in disciplined operational planning, and so plans sit on the shelf while the institution’s leadership loses credibility. In this session, you will learn what effective operational plans look like, how to coordinate this planning across campus, and strategies for freeing up critical staff time so that plans actually get implemented.

12:00 - 1:00 p.m.  Lunch (included in registration fee)
AGENDA

TUESDAY, JANUARY 29, 2013 (CONTINUED)

1:00 - 3:00 p.m.  Exploring Existing Research and Best Practices
In this interactive session, you will explore a range of 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.

3:00 - 3:15 p.m.  Refreshment break (included in registration fee)

3:15 - 3:45 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.

3:45 - 4:30 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.
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, 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 +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 recent book on collaborative strategic planning was published by NACUBO, in 2009. His 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:
Hyatt Regency Mission Bay
1441 Quivira Rd
San Diego, CA 92109

To reserve your room, call 888-421-1442. Please indicate that you are with the Academic Impressions group to receive the room rate of $189 for single or double occupancy, plus applicable tax.

A room block has been reserved for the nights of January 27 & 28, 2013. Reservations must be made by January 3, 2013. There are a limited number of rooms available at the conference rate. Please make your reservations early.

Drink in the view, relax on a deck chair, and watch the boats in the marina, or luxuriate in our new eco-friendly Blue Marble spa - you can do it all at Hyatt Regency Mission Bay Spa and Marina. Now the premier choice among San Diego resort destinations, this coastal chic property is located on Mission Bay - the largest aquatic preserve in the US - and surrounded by the serenity of azure blue water. Eight acres of lush landscaping are dotted with serene gardens, three freestyle swimming pools with the only water slides offered at a San Diego hotel, and observation decks with a panoramic view of the Pacific Ocean and Mission Bay.

When you’re ready to explore, Mission Beach is close by, and so are SeaWorld, the San Diego Zoo and Wild Animal Park, Belmont Park, championship golf courses, Old Town San Diego, and the Gaslamp District. You can also stroll the boardwalk and discover treasures in the shops located throughout Mission Beach. This hotel is located approximately five miles, or 15 minutes, from San Diego International Airport (SAN).
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, access to the networking reception on Monday, breakfast and lunch on Tuesday, and breakfast on Wednesday, as well as refreshments and snacks throughout the conference.

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**EARLY BIRD PRICING**

Postmarked on or before January 11, 2013. For registrations postmarked after January 11, 2013, an additional $100 fee per registrant applies.

**REFUND/CANCELLATION POLICY**

Refunds will be issued only if cancellations are received in writing by November 2, 2012. A $100 processing fee will be assessed. After November 2, 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.

By submitting this registration form, you agree to the terms and conditions of the above cancellation policy.

Visit our website to register online:


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**CONFERENCE ONLY**

- $1495 USD

**CONFERENCE + MONOGRAPH**

- $1595 USD

**Best Value**

Conference + Monograph - $1595 USD

__ # of attendees

Total________________

**Conference**

Conference only - $1495 USD

__ # of attendees

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**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.**

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

## ADDITIONAL CONTACT INFORMATION

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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)

CHECK/INVOICE

☐ My check is included and covers _______ registration(s) Check # ________________________________

☐ Please invoice me, Purchase Order # ________________________________ (PO # not required to receive invoice)

FREE HIGHER ED NEWS AND ANALYSIS

Each conference registration includes a subscription to Higher Ed Impact, a free industry scan of news, trends, and research on higher education, delivered in an easy-to-scan email. Higher Ed Impact (HEI) includes:

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

List the names of the registrants you’d like to sign up:

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