

INTEGRATED STRATEGIC PLANNING AND RESOURCE ALLOCATION

January 14 - 15, 2019 | New Orleans, LA



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; this 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.

CPE CREDITS

Recommended CPE Credits: 15.5

Program Field of Study: Specialized Knowledge

Delivery Method: Group Live

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

Program Level: Intermediate

AGENDA

Day One: Monday, January 14, 2019

Registration and Continental Breakfast (included in registration fee)

8:00 - 8:30 a.m.

Welcome, Introductions, and Program Walkthrough

8:30 - 9:00 a.m.

An Integrated Planning Model to Ensure Implementation

9:00 - 9:30 a.m.

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.

A Five-Phase Model for Collaborative and Integrated Planning

9:30 - 10:15 a.m.

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.

Break

10:15 - 10:30 a.m.

Environmental Scanning

10:30 - 11:00 a.m.

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? We'll explore a model for scanning the environment for clues to potential futures, helping to build the resilience and adaptability of a campus.

Planning Activity: Incorporating Diverse Thinking Styles in Your Planning Effort

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

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. Through this activity, you will learn simple tools and techniques to build cohesion among this critical group.

Lunch (included in registration fee)

12:00 - 1:15 p.m.

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

1:15 - 1:45 p.m.

During 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.

AGENDA

Day One (CONTINUED)

Leveraging the Campus Community's Knowledge

1:45 - 2:30 p.m.

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.

Break

2:30 - 2:45 p.m.

Horizon-Thinking

2:45 - 3:45 p.m.

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

Distilling the Most Important Information

3:45 - 4:30 p.m.

Planning committees often generate volumes of data but struggle with surfacing the most critical information. 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.

Setting the Vision

4:30 - 5:00 p.m.

Synthesizing all of the data gathered into a multi-year vision for the institution is challenging and politically complex. You'll learn how to create a preferred future for the institution that is reflective of stakeholder input and worthy of their commitment.

Wrap-Up and Homework Assignment

5:00 - 5:15 p.m.

Networking Reception (included in registration fee)

5:15 - 6:15 p.m.

AGENDA

Day Two: Tuesday, January 15, 2019

Continental Breakfast (included in registration fee)

8:00 - 8:30 a.m.

Reflections from Day 1 and Q&A

8:30 - 9:00 a.m.

Assessing Your Capacity to Implement

9:00 - 10:00 a.m.

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.

Short Break

10:00 - 10:05 a.m.

Strategic Plan and Budget Alignment Process

10:05 - 11:00 a.m.

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, etc.—to help ensure key resources are aligned with the plan's objectives.

Measuring Progress and Refreshing Plans

11:00 a.m. - 12:00 p.m. (includes breaks)

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

Lunch (included in registration fee)

12:15 - 1:15 p.m.

Implementation Protocols

1:15 - 2:00 p.m.

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. We'll explore a number of tools and protocols that you can deploy to address these challenges.

Reflection

2:00 - 2:30 p.m.

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

AGENDA

Day Two (CONTINUED)

Break

2:30 - 2:45 p.m.

Next Steps and Action Planning

2:45 - 3:30 p.m.

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

Final Q&A and Program Wrap-Up

3:30 - 4:00 p.m.

INSTRUCTORS

Steven Kreidler

Vice President of Finance/CFO, Colorado School of Mines Foundation

Steven's prior career was in economic development, non-profit management, and fund raising. Since then, he's served extensively in senior financial leadership positions for several institutions including most recently Vice President for Administration at MSU Denver and Executive Vice President for the University of Central Oklahoma.

His responsibilities have included budget and finance, accounting and audit, talent management, facilities, grants and contracts, extended campus, project management, process transformation, and institutional research.

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*. Dr. Sanaghan also serves as a board member of the College of Saint Benedict in St. Joseph, MN.

LOCATION

January 14 - 15, 2019 | New Orleans, LA

Hotel:

Renaissance Pere Marquette
817 Common Street
New Orleans, LA 70112
504.525.1111

Room rate:

\$139 + tax

Room block dates:

The nights of January 13 and 14, 2019.

Room block cutoff date:

December 17, 2018.

Reserve Your Room: Please call 504.525.1111 and indicate that you are with the Academic Impressions group to receive the group rate. Please book early - rooms are limited and subject to availability.

The Academic Impressions Experience



Intimate, workshop-style trainings with personalized attention



Trainings are practical and action oriented so you can hit the ground running



Carefully-vetted expert instructors who are also practitioners in the field



Learner-centric and designed for interaction and collaboration



Highly recommended:
9 out of 10 participants recommend our trainings to colleagues