

INSTITUTE FOR EXPERIENCED CHIEFS OF STAFF: IMPROVING YOUR PROCESSES, COMMUNICATIONS, AND RELATIONSHIPS

June 5 - 7, 2019 | New Orleans, LA



Improve your processes and relationships to ensure success in the chief of staff role.

The role of chief of staff looks very different at each institution and requires a unique skill set for continued success. During this three-day workshop, we will look at how you can maintain a balance in your professional life while managing a varied and often unpredictable role. We have assembled two current and two former chiefs of staff to help you:

- Manage and communicate your role to your constituents
- Mitigate stress, maintain energy, and keep a positive attitude
- Establish and maintain critical internal and external relationships
- Handle crises with confidence

This program is designed for current chiefs of staff who have been in the role three or more years. If you are a current chief of staff and are looking to explore options for your future career path, we recommend also attending our post-conference workshop.

PRE-CONFERENCE WORKSHOP: ENSURING SMOOTH PRESIDENTIAL TRANSITIONS

As a Chief of Staff, you will often be looked to for providing calm consistency during presidential transitions. The incoming President will likely look to you as he or she acclimates to a new environment, while your colleagues will rely on you to convey the new President's priorities. Learn how you can best serve in your role during these times of change. In this workshop, you will hear from two current Chiefs of Staff who have served through several presidential transitions. Max and Karen will share their processes, strategies, and tips for helping organizations stay focused during these times of transition.

POST-CONFERENCE WORKSHOP: CAREER PATHS FOR CHIEFS OF STAFF

This post-conference program will focus on paths you may take after you have served as Chief of Staff. Presented by Alex Whitaker, a college President who was formerly a Chief of Staff, and Josh Jacobs, Vice President of Advancement & Alumni Relations and former Chief of Staff, we will discuss transferable skills, options, and furthering your development for success.

WHO SHOULD ATTEND

This program is designed for those with a higher level of experience (3 or more years) in the position. Those who are new or emerging chiefs of staff who have been in the role for 3 years or less, as well as professionals aspiring to the chief of staff position, will benefit from our sister training: Fundamentals for Chiefs of Staff: Understanding Your Role and Ensuring Success from the Start.

If you have questions about which level is right for you, please reach out to our Senior Program Manager, Elizabeth Ross Hubbell.

AGENDA

Day 1 | June 5, 2019

Continental Breakfast for Pre-Conference Attendees (included in workshop registration)

8:30 - 9:00 a.m.

Pre-Conference Workshop: Ensuring Smooth Presidential Transitions

9:00 a.m. - 12:00 p.m.

As a Chief of Staff, you will often be looked to for providing calm consistency during presidential transitions. The incoming President will likely look to you as he or she acclimates to a new environment while your colleagues will rely on you to convey the new President's priorities. Learn how you can best serve in your role during these times of change. You will hear from two current Chiefs of Staff who have served through several presidential transitions. Max and Karen will share their processes, strategies, and tips for helping organizations stay focused during these times of transition.

Lunch for Pre-Conference Attendees (included in workshop registration)

12:00 - 1:00 p.m.

Main Conference Registration

12:30 - 1:00 p.m.

Welcome and Introductions

1:00 - 1:30 p.m.

In this opening activity, you will meet your facilitators and engage in an activity to define your current challenges and what you most hope to get out of this conference.

Articulating Your Role on Campus

1:30 - 2:30 p.m.

One of the most frustrating challenges for Chiefs of Staff is helping constituents better understand his or her role. By helping others on campus to know the role you play as you work with the President, you can help to manage expectations, delineate your voice vs. when you are speaking for the President, and help others know when they can come to you with questions or concerns.

Afternoon Break

2:30 - 2:45 p.m.

Strategies to Meet Your President's Goals

2:45 - 3:45 p.m.

As the Chief of Staff, you are often faced with implementing changes and initiatives set by the President, Board, and Executive Cabinet. This role can be challenging as those around you express concerns and questions regarding changes. By utilizing key negotiation and communication strategies, you can help implement these initiatives while also hearing and addressing concerns of staff and faculty.

Working Session/Day 1 Close

3:45 - 4:30 p.m.

In this final session, you will have an opportunity to discuss what you have learned in Day 1, strategies you plan to adapt or adopt, and share with colleagues for feedback.

AGENDA

Day 1 | June 5, 2019 (CONTINUED)

Networking Reception (included in conference registration)

4:30 - 5:30 p.m.

Day 2 | June 6, 2019

Continental Breakfast (included in conference registration)

8:30 - 9:00 a.m.

Five Paths to Leadership: Understanding How You Manage Stressful Situations

9:00 - 10:15 am

One of the keys to success is having an awareness of how you manage stress, being prepared for your strengths and challenges during stressful situations, and being aware of how your President and close co-workers manage stress. In this session, you will use the results from an assessment you will complete on-site to engage in a discussion on how you act when under stress and how to manage potential pitfalls.

Morning Break

10:15 - 10:30 a.m.

Spotting Trends and Issues

10:30 - 11:45 a.m.

One of your hardest, yet most critical, roles is to be an “ear to the ground” so that you are aware of emerging trends and issues on and outside of campus. By noticing trends, you can capitalize on them early and help your constituents to be proactive in preparing for emerging developments. By being able to spot potential issues, you can be a catalyst in mitigating a situation before it becomes a crisis. You will learn ways other Chiefs of Staff have successfully connected themselves across campus so that they have a hyper-awareness of happenings.

Lunch (included in conference registration)

11:45 a.m. - 1:00 p.m.

Challenging Situations: Managing Internal Conflicts and External Crises

1:00 - 2:15 p.m.

In spite of your best efforts of mitigating issues, you will likely be faced with a conflict or crisis on campus during your tenure as Chief of Staff. Managing internal conflicts requires you to work with parties with different opinions while maintaining focus on initiatives set by the President. Crisis management requires key communication skills with both external and internal audiences and close collaboration with the President to ensure your messages are in sync. The lessons provided will help you prepare for these challenges and give you resources for when you need them.

Working Session/Break

2:15 - 3:00 p.m.

In this session, you will have an opportunity to reflect on and discuss what you have learned and begin outlining action steps to take once you return to campus.

AGENDA

Day 2 | June 6, 2019 (CONTINUED)

Break

2:45 - 3:00 p.m.

Breakout Session

3:00 - 4:15 p.m.

In this session, you will have an opportunity to break into two groups, depending on your needs.

Option 1: Serving Someone Other than the President

Not all Chiefs of Staff serve a University President. We will give you strategies for working within your department while also connecting across campus.

Option 2: Working with your Board and Executive Cabinet

Gain strategies and tips for best working with your Board and Executive Cabinet. Setting clear expectations, leading productive meetings, and establishing clear communication guidelines will be discussed.

Day 2 Wrap Up

4:15 - 4:30 p.m.

Day 3 | June 7, 2019

Continental Breakfast (included in conference registration)

8:30 - 9:00 a.m.

Presidential/Executive Panel

9:00 - 10:15 a.m.

In this session, we have invited local Presidents and those at the executive level to join us for a panel discussion. You will have an opportunity to ask questions to gain insights on working with Presidents and others on the panel.

Morning Break

10:15 - 10:30 a.m.

Panel Discussion: Handling the Workload

10:30 - 11:15 a.m.

You will have a chance to hear from all speakers on their strategies for maintaining balance with their professional and personal lives while performing at their best on a daily basis.

Final Working Session

11:15 - 11:45 a.m.

In this final working session, you will have an opportunity to set goals and actions for your return to campus.

AGENDA

Day 3 | June 7, 2019 (CONTINUED)

Conference Wrap Up

11:45 a.m. - 12:00 p.m.

Lunch for Post-Conference Attendees (included in workshop registration)

12:00 - 1:00 p.m.

Post-Conference Workshop: Career Paths for Chiefs of Staff

1:00 - 4:00 p.m.

Many Chiefs of Staff wonder what career paths are open to them after they have served. In this post-conference event, you will have a chance to hear from a current President and current Vice President for Advancement & Alumni Relations who moved into their roles after serving as Chiefs of Staff. Alex and Josh will discuss their career paths and how they capitalized on their duties as Chief of Staff to succeed in their current roles. You will leave with action items to help you successfully make your transition from Chief of Staff to your next role, whether in the short-term or future plans.

INSTRUCTORS

Max Allen

Vice President and Chief of Staff, Clemson University

Since his arrival at Clemson University in June 2015, Max Allen has helped strengthen the overall national reputation and awareness of the Clemson brand. He serves as the chief advisor to President Clements and is the primary liaison with the vice presidents and other direct reports to the president. Under his leadership, he has helped design and implement the *Clemson Forward* strategic plan, coordinated a strategic reorganization of the campus diversity efforts, served as the primary liaison with key community leaders and partners, served as a member of the university's crisis decision team, and helped with the successful completion of the \$1 billion "Will to Lead" capital campaign.

Prior to Clemson, Allen served as the chief of staff at the University of North Carolina Wilmington and the executive assistant to the president and director of university relations at Georgia College & State University in Milledgeville, GA. A retired Navy Lieutenant Commander, Allen has had many successful years of challenging assignments as a Navy public affairs officer.

Allen holds a bachelor's degree from Jacksonville University in Florida and is a graduate of the Naval War College in Newport, Rhode Island, and the Leadership Georgia Class of 2000. Previous leadership service includes: Past President of the 100 Black Men of Coastal North Carolina and Past Chair of the National Association of Presidential Assistants in Higher Education. He is a member of Sigma Pi Phi (Delta Beta) fraternity. Allen serves on the Greenville, South Carolina Chamber of Commerce Board of Directors, the Clemson Chamber of Commerce Board of Directors, the Alliance Pickens Board, the UpState Alliance Board, and the BB&T Local Advisory Board in Greenville, SC.

Josh Jacobs

Vice President, Advancement & Alumni Relations, Central Methodist University

Jacobs serves as the Vice President for Advancement at Central Methodist University in Fayette, MO. He and his team focus on developing committed relationships and creating lasting opportunities that link the passions alumni and friends with the mission of Central. Jacobs has oversight of the annual fund, corporate and foundation relations, prospect research, major gifts, planned giving, comprehensive and capital campaigns, and alumni and constituent relations. Jacobs previously served as Chief of Staff to Murray State University President Randy J. Dunn. He was responsible for the daily operations of the institution and worked closely with campus constituency groups to advance the mission of the institution.

Alex Whitaker

President, King University

Alexander Whitaker became president of King University in August 2016, bringing with him strong academic and professional credentials, broad experience in higher education and law, and a long history of successful leadership in his professional, church, and civic endeavors.

President Whitaker came to King from Berry College, where he was a senior officer of the college for nearly a decade. He was chief of staff and board secretary and in charge of Berry's public relations, religious life, historical assets, and governmental relations. Previously he oversaw Berry's major gift fundraising and planned giving. The Berry College board of trustees granted him emeritus status upon his departure for King.

Before coming to King, he served three years on Georgia's Nonpublic Postsecondary Education Commission, appointed by Governor Nathan Deal. He is a member of the Georgia and Virginia bars and various higher education professional associations.

INSTRUCTORS

Karen Whitney, Ph.D.

President Emerita, Clarion University

Dr. Karen Whitney has held many leadership positions throughout her 37 year career in higher education. Whitney is a nationally recognized organizational and leadership development writer, speaker and consultant.

She most recently completed a one year (2017-18) appointment as Interim Chancellor which included providing strategic leadership to 14 universities serving over 100,000 students, making it the largest provider of higher education in Pennsylvania.

As Chancellor, she served as the chief executive officer of the System, which included:

- Working with the 14 university presidents to ensure the success of each University.
- Advises the system Board on policy development and oversees policy implementation.
- Provides recommendations to the Board on State System's overall budget.
- Reviews and recommends academic programs for the Board's approval.
- Conducts comprehensive planning for the role and scope of each university, instructional programs, research programs and public service programs in consultation with State System and university constituent groups.

Whitney was president of Clarion University, a large public masters comprehensive university, from 2010-2017. During this time, she lead the university through a period of great operational challenge and change including a transformational reorganization of colleges, departments and academic priorities.

ACADEMIC IMPRESSIONS STAFF

Elizabeth Ross Hubbell

Senior Program Manager, Academic Impressions

Elizabeth Ross Hubbell is an educator, author, and speaker with more than 20 years' experience across many levels of education. She serves as Program Manager for Student Affairs where she conducts market research on current trends and issues impacting Higher Education, collaborates with subject matter experts, and designs professional learning experiences. Her primary topics of interest include women in higher ed leadership and new innovations in advising and career services. Prior to joining Academic Impressions, Elizabeth served as a K12 consultant, focusing on instructional strategies and technologies. She has presented at ASCD, ISTE, Colorado TIE, Learning Forward, SREB, NSBA's T+L, and EARCOS conferences. Elizabeth is a former Montessori teacher.

LOCATION

June 5 - 7, 2019 | New Orleans, LA

Hotel:

Royal Sonesta New Orleans
300 Bourbon St
New Orleans, LA 70113
504.586.0300

Room rate:

\$179 + tax

Room block dates:

The nights of June 4, 5 and 6, 2019.

Room block cutoff date:

May 14, 2019.

Reserve Your Room: Please call 504.586.0300 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