

INTEGRATED STRATEGIC PLANNING, BUDGETING, AND IMPLEMENTATION FOR HIGHER EDUCATION

January 27 - 28, 2020 | Seattle, WA



90% of strategic plans in higher education don't get implemented; join us to learn why and what to do about it.

OVERVIEW

Most strategic plans in higher education are beautifully written, capture the imagination, and pursue noble goals. And yet most don't get implemented. Join us in Seattle to learn why and hear about a practical approach to ensuring alignment between individual stakeholders and the institutional vision. Specifically, you will learn how to:

- Bring in a diverse set of talent to ensure an inclusive planning process for everyone
- Design a process that can gather input from thousands of stakeholders
- Ensure the planning process doesn't lose momentum
- Assess your capacity for implementation to anticipate the most challenging areas
- Align resources and prioritize funding for implementation
- Visualize and measure your progress on an integrated dashboard to foster accountability and alignment across the institution
- Build problem solving capacity amongst your stakeholders throughout the process

Because of the interactive nature of this program, participation is limited to only 50 registrants.

WHO SHOULD ATTEND

This program will highly benefit teams of Provosts, Chief Financial Officers, Chief Planning Officers, and other cabinet level officials who are charged with stewarding institution-wide planning processes. Presidents may also join and support their planning teams as a key champion. We strongly recommend and encourage bringing a strategic planning team that includes members from the areas mentioned above. Individuals attendees are also welcome.

BRING YOUR TEAM AND SAVE!

Save over 15% when you register three or more colleagues.

IS THIS PROGRAM RIGHT FOR ME?

If you answer **yes** to at least one of the following questions, you will find this training valuable:

1. Did a lot of folks say or think “Here we go again” when the planning process was announced?
2. Has your plan or planning process stalled, and are you struggling to revive momentum?
3. Do you have a lot of activity without the alignment with the most important goals in the plan?
4. Have you experienced a recent leadership transition that is creating a new sense of urgency around planning?
5. Do you have a strategic plan in place without a process for implementation?
6. If you have a plan in place now, are you looking for ways to measure progress and align resources?

INCLUDED IN YOUR REGISTRATION: STRATEGIC PLANNING GUIDEBOOK

Given the focus on tactics and techniques that you can use immediately back on campus, we are including a copy of *Collaborative Strategic Planning in Higher Education* with your registration.

As part of the program, you will also get:

- **Proven planning techniques and practices** to help you engage hundreds of stakeholders without bogging down the process
- **Templates and real university examples** of implementation plans, budget alignment, and platforms for tracking and communicating progress
- **A validated assessment** to measure your capacity for implementation; this will be taken and analyzed during the event so that you can identify growth areas before you get started

FOLLOW THROUGH WITH SUCCESS COACHING

Have you ever gone to a training only to find that you came back with great ideas but don't have the time, support, or skills needed to make the changes?

Academic Impressions has produced thousands of trainings and we have learned that utilizing a coach after attending a conference helps provide accountability and bridges the training with the on-the-ground work of getting the job done.

As a result, we are now offering success coaching on select conferences.

- Purchase this training + 3 one-hour follow up success coaching calls
- Work with an assigned coach who has extensive experience in higher ed
- Get individualized support to help you follow through on what you've learned
- Workshop your plans, run your ideas by someone, and get additional help or practice

To learn more, contact Patricia Sandler at patricia@academicimpressions.com or purchase the Premium Pass with success coaching.

AGENDA

Day One: Monday, January 27, 2020

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.

A Five-Phase Model for Collaborative and Integrated Planning

9:00 - 9:45 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.

University Perspective: How to Adapt a Planning Framework for Your Campus

9:45 - 10:30 a.m.

Institutions must take an integrated approach to aligning plans, people, and resources. We'll begin the program with an overview of how our expert has successfully implemented a strategic planning process at two institutions including Northern Kentucky and Ball State. Through these examples, you will learn how institutions adapt a framework for their specific culture and regions.

Break

10:30 - 10:45 a.m.

Planning Activity: Incorporating Diverse Thinking Styles in Your Planning Effort

10:45 - 11:45 a.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)

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

AGENDA

Day One (CONTINUED)

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

1:00 - 1:30 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.

Leveraging the Campus Community's Knowledge

1:30 - 2:15 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

2:15 - 2:30 p.m.

Horizon-Thinking/Future Timeline

2:30 - 3:30 p.m.

Plans must not only serve the institution well in the near future, but they must also 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

3:30 - 4:15 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

4:15 - 4:45 p.m.

Synthesizing all the data gathered into a multi-year vision is challenging and politically complex for institutions. 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

4:45 - 5:00 p.m.

AGENDA

Day One (CONTINUED)

Networking Reception (included in registration fee)

5:00 - 6:00 p.m.

This informal reception is your chance to decompress, have some refreshments on us, and expand your network of connections. Our programs are intentionally designed for smaller groups, so this is a great time to catch-up with attendees and speakers whom you may not have connected with yet.

Day Two: Tuesday, January 28, 2020

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. 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.

AGENDA

Day Two (CONTINUED)

Lunch (included in registration fee)

12:00 - 1:00 p.m.

Implementation Protocols

1:00 - 2:15 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 several tools and protocols that you can deploy to address these challenges.

Reflection

2:15 - 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.

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

Sue Hodges Moore

Chief Strategy Officer, Ball State University

Sue joined Ball State University as its first chief strategy officer in March 2018. She currently assists with the development of a new strategic plan for the University and supports the plan's successful implementation. She also assists divisions, colleges, and units with developing and successfully implementing their own individual plans, while ensuring that those plans align with the University's priorities. In addition, Sue oversees the Offices of Institutional Research and Decision Support, Community Engagement, and Institutional Diversity.

Sue arrived at Ball State after dedicating nearly 40 years of her higher education career to the people of Kentucky. Sue began her career at her alma mater, Northern Kentucky University, where she returned as an administrator in 2005. Most recently, she served as NKU's senior vice president of administration and finance. Before NKU, she worked for the Kentucky Council on Postsecondary Education and held previous leadership positions at East Carolina University and the University of Louisville.

In addition to a Bachelor of Science from NKU, Sue has earned an MBA from Xavier University and a doctorate in education administration from the University of Louisville.

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.

ACADEMIC IMPRESSIONS STAFF

Amit Mrig

President, Academic Impressions

Amit co-founded Academic Impressions in 2002 to provide research, publishing, and training on issues that directly impact the sustainability of higher education. Under his direction, AI has published hundreds of articles and papers, interactive training programs, and topical and timely webcasts, serving over 50,000 academic and administrative leaders across 3,500 colleges and universities.

Amit leads and manages AI's research, programming, and publications on higher ed leadership development. Many of AI's research and thought leadership papers have been authored by Amit, including *The Future of Higher Education* (2018), *The Skills Higher Ed Leaders Need to Succeed* (2017), *Shifting from a Scarcity Mindset to an Opportunity Mindset* (2017), and *The Other Higher Ed Bubble* (2013).

Amit has consulted with dozens of higher ed leaders, cabinet members, and board members—discussing current challenges and practical solutions while helping to identify which issues they can address to best impact change at their institution. He also leads our Presidential Dialogues series, discussing higher ed strategy and leadership with college and university presidents. Amit is a frequent contributor to *Forbes*, discussing issues in higher education. He also serves as an active board member of The Challenge Foundation, an organization helping low-income students successfully earn a college degree.

Amit frequently speaks at cabinet and board meetings, retreats, workshops, and conferences on trends and innovations in higher ed, leadership development, and capacity building. He is also a certified Gallup Strengths coach.

LOCATION

January 27 - 28, 2020 | Seattle, WA

Hotel:

Hyatt Regency Seattle

808 Howell Street

Seattle, WA 98101

206.973.1234

Room rate:

\$179 + tax

Room block dates:

The nights of January 26 and 27, 2020.

Room block cutoff date:

January 6, 2020.

Reserve Your Room: Please call 206.973.1234 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