

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

July 13 - 15, 2020 | Vail, CO



Learn to better define your Chief of Staff role, decide upon the skill sets that your institution needs, and identify your areas of strength and growth for success in your role.

OVERVIEW

The role of chief of staff looks very different at each institution and requires a unique skill set for continued success. During this 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 six current and former chiefs of staff to help you:

- Define the right role for yourself
- Navigate the massive and ambiguous workload with the appropriate tools
- Mitigate stress, maintain energy, and keep a positive attitude
- Establish and maintain critical internal and external relationships
- Handle presidential transitions, conflicts, and crises with confidence

PRE-CONFERENCE WORKSHOP

Ensuring Smooth Presidential Transitions

As 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.

WHO SHOULD ATTEND

This program is designed for those with a higher level of experience (three or more years) in the position.

AGENDA

Day One

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

8:30 - 9:00 a.m.

Pre-Conference Workshop: Ensuring Smooth Presidential Transitions

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

As 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.

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

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.

Defining Your Role on Campus

1:30 - 2:30 p.m.

We will discuss how the role of Chief of Staff can have a wide variety of models and structures. Your university size and the needs of your President and Board will largely determine the role you serve. In this hour, you will learn which questions to ask to clarify of your role and methods you can use to help others on campus understand your function from the start.

Strategies to Meet Your President's Goals

2:30 - 3:30 p.m.

As 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.

AGENDA

Day One (CONTINUED)

Break

3:30 - 3:45 p.m.

Working Session/Day 1 Close

3:45 - 4:30 p.m.

In this final session of the day, 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.

Networking Reception (included in registration fee)

4:30 - 5:30 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

Continental Breakfast (included in registration fee)

8:30 - 9:00 a.m.

Five Paths to Leadership: Understanding How You Manage Stressful Situations

9:00 - 10:15 a.m.

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.

Break

10:15 - 10:30 a.m.

AGENDA

Day Two (CONTINUED)

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. In this session, 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 registration fee)

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

Challenging Situations: Managing Internal Conflicts and External Crises

1:00 - 2:15 p.m.

Despite your best efforts to mitigate 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

2:15 - 2:45 p.m.

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.

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.

AGENDA

Day Two (CONTINUED)

Option 2: Working with Your Board and Executive Cabinet

You will 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.

Option 3: Marketing Your Skills as Chief of Staff

This session will focus on skill sets you are building as you serve as Chief of Staff and how you can use those in other capacities, both present and future. We will discuss transferable skills, options, and furthering your development for success.

Day 2 Wrap Up

4:15 - 4:30 p.m.

Day Three

Continental Breakfast (included in registration fee)

8:30 - 9:00 a.m.

Presidential/Executive Panel

9:00 - 10:15 a.m.

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.

Break

10:15 - 10:30 a.m.

Panel Discussion: Handling the Workload

10:30 - 11:15 a.m.

During this panel discussion, 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.

AGENDA

Day Three (CONTINUED)

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.

Conference Wrap Up

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

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.

INSTRUCTORS

Nate Bryant, Ed.D.

Chief of Staff, Salem State University

Dr. Nate Bryant currently serves as the Chief of Staff to the President at Salem State University in Salem, MA. As Chief of Staff, Nate is responsible for the oversight of the president's office including the day-to-day activities of the President's Office, coordinating the work of the president's senior leadership team, and coordinating the University's strategic planning efforts. Additionally, Nate oversees the areas of Enrollment Management, Marketing and Communications, Public Relations, Center for Civic Engagement, External Affairs, and Grants.

Nate has over 30 years of experience in higher education and during that time, has overseen the areas of admissions, financial aid, multicultural affairs, academic advising, tutoring, and both institutional and federally funded college retention programs. Nate also has considerable experience in the areas of crisis management, fundraising, and strategic planning.

In addition to his work in higher education, Nate has worked with many non-profit organizations. Nate is currently serving on the Board of Trustees for the North Shore Medical Center, Board of Directors for the Salem Boys and Girls Club, Board of Directors for the Salem Chamber of Commerce, Executive Committee for the Salem Partnership, Corporator for Marblehead Bank, volunteer for Haven from Hunger Food Pantry, and was a two-term School Committee member for the Salem Public Schools.

Nate received his Bachelor of Science in Business Administration and Master of Education from Salem State University, and his Doctorate in Education from the University of Massachusetts Boston.

Christopher Romano

Vice President of Enrollment Management and Student Affairs, Ramapo College of New Jersey

Christopher leads the Division of Enrollment Management, including the offices of admissions, advising and first-year experience, career services, financial aid, marketing and web administration, athletics, residence life, the Educational Opportunity Fund, public safety, and the division of student affairs. Christopher chairs the Strategic Enrollment Management Planning Committee. He serves as a member of the president's cabinet as well as other administrative bodies to ensure that institutional conversations and decisions consider the impact not only on incoming student enrollment, but also on the way those decisions impact the perception, experience, and ultimate success of current students. Previously, Christopher has served as the associate vice president of enrollment management and as the special assistant to the president of Ramapo College.

Christopher earned his bachelor's degree in international relations from Saint Joseph's University (PA) and a master's in higher education administration from Harvard University. He has presented nationally on strategic enrollment management as a model for implementing change, the student engagement project at Ramapo, marketing/branding in the context of enrollment management, developing an institutional model for student success and utilizing data, and modeling to predict student retention. His professional work concentrates on strategic planning, student success, higher education leadership, student engagement, and using data to drive decision making.

INSTRUCTORS

Dr. Karen M. Whitney

President Emerita, Clarion University

Throughout her 40 year career in higher education, Dr. Karen Whitney has held a variety of executive and leadership positions with increasing levels of responsibility, beginning as a Director to Associate Vice President, Vice Chancellor, President, and Chancellor. Karen is also a nationally recognized organizational and leadership development writer, speaker, consultant and advisor. She holds a doctorate from the University of Texas at Austin in Higher Education Administration and is a certified coach through the Center for Executive Coaching.

Most recently, Karen served as Interim Chancellor for the Pennsylvania State System of Higher Education (PASSHE), providing strategic leadership to a 14-university system serving over 100,000 students and employing more than 12,000 faculty and staff with a \$2.3 billion annual operating budget. As the chief executive officer of a system, she worked with the 14 university presidents to ensure the success of each University. She advised the system board and 14 university boards on policy development and policy implementation. Her other responsibilities included: budget planning & state appropriation; academic program approval; comprehensive planning; negotiating collective bargaining agreements; representing the system to the public including elected and civic leaders; and serving as a champion for higher learning public policy.

Karen served as President of Clarion University, a large public masters comprehensive university for 7 years. During this time, she led the university through a period of great operational challenge and change including a transformational reorganization of colleges, departments and academic priorities. Most notably, she focused the university as a leader in offering innovative professional programs in business, education, health and human services.

Karen also has extensive leadership experience at different types of institutions. She served as Vice Chancellor for Student Life at Indiana University Purdue University Indianapolis (IUPUI). She also held leadership positions at the University of Texas at San Antonio (UTSA) and the University of Houston. She held clinical appointments in teaching from the Indiana University School of Education.

After a very accomplished career as a leader and executive in higher education, Karen is now passionately focused on working with other leaders, executives and board members to ensure their success in service to their students and institutions. She advocates for courageous and confident leadership that is needed now more than ever in higher education, particularly since the challenges and threats to leadership success seem to be increasing. In working with every leader to succeed, Karen's approach is to combine a proven track-record of higher education leadership with a variety of engagement approaches, including advising, coaching, facilitating and training. Drawing on her vast experience at every level of leadership, she customizes an individual structured process to ensure each leader achieves their highest professional and institutional priorities.

INSTRUCTORS

Brittany Williams-Goldstein, Ed.D.

Chief of Staff & Board Liaison, Ramapo College

Dr. Williams-Goldstein serves as the President's primary liaison to the Senior Cabinet and the Board of Trustees. She is responsible for the strategic development, implementation, and coordination of Cabinet and Board activities as well as the coordination of the Office of the President. She chairs the Space Management and Allocation Committee and also leads the College's Administrative Assessment Committee. During her tenure at Ramapo, she has served as a member of the Campus Facilities Master Plan Steering Committee, Accreditation Steering Committee, Position Review Committee, and two Strategic Planning Task Forces.

Dr. Williams-Goldstein began her professional career as a journalist and later transitioned into higher education as an instructor of Spanish and English as a Second Language. She has also fulfilled roles as Designated School Official, chief human resources officer, and executive assistant to the president. She has presented nationally on board of trustees development and was awarded the Professional Board Staff Member Award (Northeast) by the Association of Community College Trustees.

She earned her Ed.D. in Educational Leadership with a focus on Public Policy from Rowan University, her M.S.Ed. in Higher Education Management from the University of Pennsylvania, and her B.A. in Communications/Journalism from William Paterson University. She is a graduate of the Chair Academy for Leadership, is certified in Affirmative Action Complaint Processing, and is a trained Title IX investigator. She is a member of the Public Relations Society of America and the Board Professionals Network of the Association of Governing Boards.

INSTRUCTORS

Dr. Wendy Wilson

Vice President of University Relations/Chief of Staff, Albany State University

Wendy Wilson is a native of Detroit, Michigan. She holds a Doctorate (Ed.D.) in Curriculum Leadership from Columbus State University, a Master of Science in Human Resource Management from Central Michigan University, and a Bachelor of Science in Organizational Management from Bluefield College.

Wilson currently serves as Albany State University's vice president of university relations, interim vice president of student affairs, and chief of staff. Her primary responsibilities include facilitating strategic management processes and interacting with members at all levels of the internal and external university community for the purpose of defining, advancing, and assessing the work of the Office of the President in support of effective institutional alignment and synergy.

Her higher education experience spans over 16 years and includes the roles of executive director of the ASU Cordele Center, special assistant to the president for strategic communications and university relations, interim director of university communications, and director of alumni affairs. She is noted in the southwest Georgia community as the host of Realizing Potential a television show highlighting the accomplishments of Albany State alumni and community leaders.

Wilson civic and community engagement is equally impressive. She serves as a board member for the Partnership for Excellence in Education, Albany Civil Rights Institute, a member of Alpha Kappa Alpha Sorority Inc., and past president of Girls Inc. of Albany.

Dr. Wilson is highly sought for her expertise and training in the areas of professional and leadership development. In 2012, Wilson launched a public relations firm. W2 Consulting examines and develops branding, image, and professional development strategies.

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

Institute for Experienced Chiefs of Staff

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Hotel:

Vail Marriott

715 W Lionshead Circle

Vail, CO 81657

970.479.6941

Room rate:

\$189 + tax

Room block dates:

The nights of July 12, 13 and 14, 2020.

Room block cutoff date:

June 16, 2020.

Reserve Your Room: Please call (904) 970.479.6941 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