

# COLLABORATIVE STRATEGIC PLANNING & RESOURCE ALLOCATION WORKSHOP

June 15 – 17, 2010  
Denver, CO



ACADEMIC · IMPRESSIONS

## OVERVIEW

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Institutions are operating in an increasingly dynamic market, regulatory, and economic environment. The ones that succeed will be those who can meaningfully engage multiple stakeholders to generate and implement effective solutions — solutions that are unique to their campus culture, complexity, and challenges.

Join two leading experts (with over 60 years combined experience) in strategic planning and resource allocation to learn proven techniques necessary to design, organize, and implement a planning and resource allocation process that can successfully engage stakeholders in almost any campus environment.

## KEY PROGRAM TAKEAWAYS

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This program is right for you if you are looking for practical strategies to:

- Facilitate an open, honest, and collaborative strategic planning process
- Engage the campus community in “horizon thinking”
- Inform planning decisions with external perspectives
- Effectively and efficiently distill large quantities of information to surface the best ideas
- Build a highly effective planning task force
- Allocate resources in ways that are consistent with established priorities and institutional values
- Develop measurable outcomes

## WHO SHOULD ATTEND

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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. Please register early.

Note: Participation in this program is only open to institutional representatives. Consultants and other corporate interests will not be allowed to register but can contact Academic Impressions if they are interested in sponsoring the program.

## A UNIQUE, HANDS-ON FORMAT

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This is a highly immersive program that offers an active learning opportunity. At the event, you will use a multi-faceted case study to apply the lessons learned and grapple with tough planning decisions.

You will also simulate various planning activities that you can replicate back on campus. With a focus on practice and application, you will leave this program with the tools, processes, and skills to meaningfully engage stakeholders on campus.

**You're  
working in  
a new era  
of higher  
education; one  
that will be  
less forgiving  
of a lack of  
strategy.**

## BUILD YOUR PROFESSIONAL LIBRARY – INCLUDED IN YOUR REGISTRATION!

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Because of the depth and breadth of the subject matter, we are including three key resources that you must have as part of your professional library. These resources are included in your registration at no additional cost!

*Collaborative Strategic Planning in Higher Education* – Patrick Sanaghan

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 meaningfully engage large swaths of the campus community in short periods of time.

*Essentials of College & University Budgeting* – Larry Goldstein

Larry Goldstein, nationally recognized higher education finance expert, offers a comprehensive review of the budget process in this book. This practically-focused book contains information on budget types, techniques, and processes to allocate your limited funds.

*Planning and Assessment in Higher Education: Demonstrating Institutional Effectiveness* – Michael Middaugh

Written by noted expert in the field Michael Middaugh, this book is an essential resource for college and university leaders and staff charged with the task of providing evidence of institutional effectiveness.

## WHAT YOU NEED TO BRING

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Because of the working-nature of the program, we recommend that you bring:

- A laptop
- Flash drive to store files

Not all participants will need these items but they will be used throughout the group working sessions.

## INSTRUCTORS

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### **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 has co-authored several publications including *Presidential Transitions*.

Immediately prior to establishing Campus Strategies, LLC, 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 over a hundred organizations and sixty campuses over the last twenty five years. He has taught strategic planning to over a 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 most recent book, *Presidential Transitions*, was published by ACE/Praeger in 2007. His book on collaborative strategic planning will be published by NACUBO in 2008. He is currently writing a book on exceptional leadership.

## CONFERENCE AGENDA

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TUESDAY, JUNE 15, 2010

- 8:00 – 8:30am **Continental Breakfast & Registration**
- 8:30 – 9:00 a.m. **Welcome / Introductions / Agenda Review**
- 9:00 – 10:00 a.m. **An Integrated Approach**  
*Institutions must take an integrated approach to planning, resource allocation, and assessment. You will begin the program with an overview of these concepts and how they are linked and offer an organizing framework that can guide your efforts back on campus.*
- 10:00 – 10:20 a.m. **Working Break**
- 10:20 – 11:00 a.m. **Planning activity – Reaching agreement on the most critical elements of the case**
- 11:00 – 11:30 a.m. **Tapping into the Collective Intelligence of the Campus Community**  
*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 data-gathering activity. You will also conduct a SWOT analysis based on the information provided in the case and the knowledge you bring to the program.*
- 11:30 – 11:45 a.m. **Planning activity – Applying the results of the SWOT analysis to the case**
- 11:45 a.m. – 12:30 p.m. **Engaged Planning Processes**  
*Plans are most often not implemented due to the 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 prizes efficiency and progress.*
- 12:30 – 1:30 p.m. **Lunch (included in registration)**
- 1:30 – 2:15 **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 ten years.*
- 2:15 – 2:30 p.m. **Planning activity – Considering the implications of the horizon thinking results on the case**
- 2:30 – 3:15 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 can also be used to more effectively engage the campus in important discussions.*
- 3:15 – 3:30 p.m. **Refreshment break**
- 3:30 – 3:45 p.m. **Planning activity – Selecting the strategic themes to be pursued in the case**
- 3:45 – 3:55 p.m. **Setting the Vision**  
*Setting and articulating the vision for the institution is a critical stage in the planning process. In this session you will learn a tried and true process that builds on the data already gathered and engages a diverse set of internal and external stakeholders to define the preferred future for the institution.*
- 3:55 – 4:30 p.m. **Planning activity – Identifying strategic initiatives to support the case's strategic themes**
- 4:30 – 4:45 p.m. **Wrap-up / Homework Assignment (Short Reading)**
- 5:00 – 6:00 p.m. **Networking Reception (included in registration)**

## CONFERENCE AGENDA

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WEDNESDAY, JUNE 16, 2010

- 8:00 – 8:30am **Continental Breakfast**
- 8:30 – 8:45 a.m. **What's on Top?**
- 8:45 – 10:45 a.m. **Exploring Existing Research & Best Practice**  
*In this interactive session, you will share key takeaways from the articles you read the previous evening. The articles highlight critical concepts in the areas of planning, resource allocation, assessment, and anticipatory thinking. 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.*
- 10:45 – 11:00 a.m. **Refreshment Break**
- 11:00 a.m. – 12:15 p.m. **Strategic Resource Allocation**  
*Aligning an institution's budget with its top priorities results in more effective allocation of limited resources and allows for sustainable progress through a variety of economic conditions. In this session you will learn key principles and tools required for linking resource allocation decisions with planning priorities.*
- 12:15 – 1:15 p.m. **Lunch (included in registration)**
- 1:15 – 2:15 p.m. **The Power of Diverse Thinking Styles**  
*Engagement is a difficult task with like-minded people and even more so when the various stakeholders view the world differently. In this session you will utilize the Hermann Brain Dominance Instrument (HBDI) to recognize the power of diverse thinking styles and the implications for meetings, decision making, and communication.*
- 2:15 – 3:00 p.m. **Planning activity: Using the case to decide how to make strategic decisions**
- 3:00 – 3:15 p.m. **Refreshment break**
- 3:15 – 3:45 p.m. **Planning activity: Sharing the various groups' strategic initiatives**
- 3:45 – 4:30 p.m. **Using Mind Mapping to Aid Decision Making**  
*In this unique session, you will be engaged in a mind mapping exercise, facilitated with a software application, to help identify the most important stakeholders to be engaged directly through the planning process. This activity will demonstrate a collaborative and strategic way to think systemically when analyzing a situation.*
- 4:30 – 4:45 p.m. **Looking into the Future**  
*You will close the second day with a short video that reviews some significant data about the future and the challenges it will bring. This presentation can help others on your campus understand the complexity and pace of change in the future.*
- 4:45 – 5:00 p.m. **Wrap-up**

## **CONFERENCE AGENDA**

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THURSDAY, JUNE 17, 2010

- 8:00 – 8:30am **Continental Breakfast**
- 8:30 – 8:45 a.m. **What's on Top?**
- 8:45 – 9:15 a.m. **Data-gathering Techniques**  
*Planning task forces are charged with the enormous task of gathering input and data from hundreds if not thousands of campus stakeholders. In this session you will learn about and practice two techniques that allow you to gather input in a disciplined but efficient manner.*
- 9:15 – 9:45 a.m. **Planning Tools**  
*In this session you will learn about two important tools to aid your planning process. First, you will use a simple tool to assess your institution's capacity for collaborative and effective planning. The tool is meant to be used with your planning task force and can surface important strengths to build on and weaknesses to manage.*  
  
*Second, you will work through an exercise designed to surface implementation challenges before you commit to your strategic plan. This type of activity can be instrumental in ensuring successful execution of your plans.*
- 9:45 – 10:15 a.m. **Anticipatory Thinking**  
*The planning task force and larger campus community must be able to recognize the moments, emerging trends, and disparate data that could have significant implications for the future. In this session you will learn how anticipatory thinking can support planning and how to engage campus stakeholders in this critical activity.*
- 10:15 – 10:30 a.m. **Refreshment Break**
- 10:30 – 11:30 a.m. **Assessment**  
*Effective assessment is the key to moving from periodic creation of plans to building a culture of planning. Join us to learn how to move from focusing on easy-to-measure outputs to the more significant outcomes institutions seek to achieve. Establishing the desired outcomes as part of the planning process helps enhance the likelihood of successful impacts resulting from your efforts.*
- 11:30 a.m. – 12:30 p.m. **Planning Activity: Identifying Outcomes Measures**
- 12:30 – 1:30 p.m. **Working Lunch (included in registration)**
- 1:30 – 2:30 p.m. **PowerPoint**  
*Your small group will have the opportunity to present your approach to addressing the case scenario including your strategic themes, initiatives, and outcomes.*
- 2:30 – 3:00 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 last three days.*
- 3:00-3:30 p.m. **Next Steps/Action Planning**  
*With a thought partner, you will identify specific steps that you will take when you return to your campus.*
- 3:30 – 4:00 p.m. **Wrap-up**

## HOTEL RESERVATIONS

The conference will be held at:

The Curtis Hotel  
1405 Curtis Street  
Denver, CO 80202

To reserve your room, call 303-571-0300. Please indicate that you are with the Academic Impressions group to receive the room rate of \$159 for single or double occupancy, plus applicable tax.

A room block has been reserved for the nights of June 13 – 16, 2010. Reservations must be made by May 21, 2010. There are a limited number of rooms available at the conference rate. Please make your reservations early.

The Curtis hotel in Denver is a boutique hotel located in the center of all the action, just two short blocks off the celebrated 16th Street Mall. Shopping, dining, entertainment, and the cultural scene are all right here in Denver. The hotel is directly across the street from the Denver Performing Arts Complex and a short block from the Colorado Convention Center. The Curtis is a one of a kind Denver hotel experience.



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Website:  
[www.nasba.org](http://www.nasba.org)

**Recommended CPE Credits:** 24.5

**Specialized Knowledge and Applications:** Group-Live

**Prerequisites:** Attendees should be familiar with the basics of conducting a strategic planning process. This program will build on that foundation by helping you understand how to meaningfully engage multiple stakeholders in the process in order to improve the end product and ensure ownership.

**Program Level:** Intermediate

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June 15 – 17, 2010 :: Denver, CO

Attend as a team – remember, if you register as a group, every 4th registrant is free.  
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](http://www.academicimpressions.com)**

## REGISTRATION FEES

Your registration fee includes: full access to all workshop sessions and materials, access to the networking reception on Tuesday, breakfast and lunch on Tuesday, Wednesday, and Thursday, as well as refreshments and snacks throughout the workshop.

Postmarked on or before June 4, 2010

Collaborative Strategic Planning & Resource Allocation Workshop \_\_\_\_\_ \$1295 USD  
(For registrations postmarked after June 4, 2010 an additional \$100 fee per registrant applies)

Check here if you have any dietary or accessibility needs. Please list any needs in the space below and we will do our best to accommodate you.

How did you hear about this event? (email from AI, colleague forwarded email, *The Chronicle*, etc.) \_\_\_\_\_

## CONFERENCE REGISTRATION INFORMATION (PLEASE PRINT CLEARLY)

Name \_\_\_\_\_ Name Preferred for Badge \_\_\_\_\_

\_\_\_\_\_

Job Title \_\_\_\_\_ Institution/Organization \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_ Country \_\_\_\_\_

(For registration confirmations and pre-conference communication. FOR ADDITIONAL REGISTRANTS PLEASE COMPLETE ADDITIONAL FORMS.)

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

Additional Contact Name \_\_\_\_\_ Additional Contact Phone \_\_\_\_\_

Additional Contact Title \_\_\_\_\_ Additional Contact Email \_\_\_\_\_

Emergency Contact Name \_\_\_\_\_ Emergency Contact Phone \_\_\_\_\_

(In case of emergency, we will contact this person on your behalf)

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Academic Impressions is happy to offer free higher education daily news updates and weekly analysis, delivered in an easy-to-scan email.

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## PAYMENT METHOD

We accept Visa, MC, and AmEx credit cards. To pay by check, include the check with this form or select the "invoice me" option. Fax form to 303.741.0849 or mail form along with payment to: Academic Impressions, 4643 S. Ulster St. Ste. 350, Denver, CO 80237.

### CREDIT CARD

Please charge my credit card: (Visa, MC, AmEx)

Name on Card \_\_\_\_\_

Account Number \_\_\_\_\_

Exp. Date \_\_\_\_\_

Billing Zip Code/Postal Code \_\_\_\_\_

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)

## REFUND/CANCELLATION POLICY

Refunds will be issued only if cancellations are received in writing by March 19, 2010. A \$100 processing fee will be assessed. After March 19, 2010 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.