

COMPREHENSIVE INSTITUTIONAL PLANNING FORUM

WEDNESDAY | FEBRUARY 16, 2022



PRESENTERS: TIM FULLER, FOUNDER | FULLER HIGHER ED SOLUTIONS, ABHE SR. FELLOW
JEFF SPEAR, FOUNDER | CFO COLLEAGUE

Overview: Every college needs a strategic plan. Accreditors require them. Board members and donors expect them as a window into where the institution is heading. Faculty and staff are looking for focus and direction; to know there's a plan behind their daily activities. But how do plans like a campus master plan, strategic enrollment plan, budget plan and operational plan . . . how do they all fit with your comprehensive strategic plan?

- ▶ Understanding the various types and parts of institutional planning
- ▶ Seeing the whole picture along with the essential parts
- ▶ Knowing who should do what planning

8:00 – 8:15 **Welcome & Instructions**

8:15 – 9:30 **SESSION 1 — THE CONTEXT FOR INSTITUTIONAL PLANNING**

Overview: Besides the strategic plan, which other plans should a college have? How do they fit together? What's the ideal timing for what happens on a comprehensive planning agenda?

9:30 – 10:15 **Refreshment Break — Regency Foyer**

10:15 – 11:45 **SESSION 2 — STRATEGIC PLANNING 101**

Overview: Who should be involved in creating a strategic plan? What are the right number of planning themes and initiatives to include to strike the correct balance between too many and not enough? How do colleges ensure plans get implemented?

12:00 – 1:00 **Buffet Lunch — Regency Foyer**

1:00 – 2:15 **SESSION 3 — FINANCIAL PLANNING**

Overview: Creating a comprehensive financial plan which guides annual expenditures and future projections is an important task and must be tied to the strategic plan. How should such a plan be created, monitored, and measured? And what other information is needed beyond standard reports to better guide the institution over multiple years?

2:15 – 3:00 **Refreshment Break — Regency Foyer**

3:00 – 4:15 **SESSION 4 — THE REST OF THE PLANNING AGENDA**

Overview: Strategic enrollment and campus master plans are other critical elements of a thriving college. What should be included in each of these plans? How do they get tied to the strategic plan? How should they be monitored, funded, and updated?

4:15 – 4:30 **Wrap Up**

6:00 – 8:30 **CONNECTIONS DINNER — SAK COMEDY LAB — *Sponsored by Columbia International University***
Ballroom B/C/D