

Integrated Planning and Budgeting

Delta Ottawa Hotel and Suites

October 21 and 22, 2011

**Academic, Capital and Financial Planning:
How to Achieve Integrated Planning and Budgeting in your institution**

Introduction

The need and importance of integrated planning within post-secondary institutions is critical. Every day governing boards and senior executive teams are faced with the issues of advancing strategic and operational priorities, while working collectively to achieve the common vision, mission and goals of the institution; all of this within an environment of great uncertainty and a time when resources are extremely limited.

The key to the development of an integrated institutional plan is a sound academic plan, driven by the institution's vision, mission and values. These activities must then be integrated with faculty/unit plans which provide the necessary detail to permit the development of the capital plans and financial plans.

Objectives

This two day workshop will cover all aspects of integrated planning and budgeting within higher education.

The workshop will fully illustrate how integrated planning can effectively link an institution's academic, financial and capital plans across all levels of the organization from the faculties and administrative units all the way up to the institution's vision and mission. The participants will have the tools to position their organization to more effectively advance their academic priorities, ensure maximum benefit from limited resources, attract new resources, increase their competitive advantage, achieve effective performance measurement, and demonstrate comprehensive accountability to all stakeholder groups.

- ◆ *Provide participants with a detailed understanding of integrated planning and budgeting.*
- ◆ *Present tools and strategies that will enable participants to develop, implement and maintain an integrated planning framework at their institution.*
- ◆ *Share real life stories, pitfalls and lessons learned.*
- ◆ *Workshop provides access to resources that will assist participants with integrated planning and budgeting.*
- ◆ *Build a network of colleagues.*
- ◆ **Have Fun!**

Who Should Attend

The workshop is targeted at academic, capital and resource planning senior and mid-level staff. Anyone who is involved in planning and budgeting or who has been tasked with preparing a plan for the institution, Faculty or department should attend. Examples of participants would include the provost or vice president academic, vice-presidents, deans, chairs, staff from capital planning or budget units, leaders of ancillary units, and senior administrative staff responsible for planning and budgeting. Participants will leave knowing the core elements of a comprehensive integrated plan, successful processes and strategies for institutional engagement, pitfalls to avoid, and strategies for the implementation, operationalization and evaluation of the institution's plans.

Why Should You Take This Course?

The most common statements made by institution's who are trying to plan is that they do so in the absence of a clearly articulated academic plan, or if there is an academic plan there is no linkage between that plan, the capital plan and budgets.

Post-secondary institutions can no longer function effectively, be strategic or maximize limited resources with this lack of integration. The need and importance of integrated planning within post-secondary institutions is critical. Every day governing boards and senior executive teams are faced with the issues of advancing academic and operational priorities, working collectively to achieve the common vision/mission of the institution, competing for limited resources and demonstrating performance and accountability to a broad range of funding agencies and stakeholders. Integrated planning which brings together academic, capital and financial plans is a tool that can be used throughout the institution to enable the Provost, the management team and academic leaders to address planning issues in a logical, comprehensive and transparent way.

Workshop Topics

Overview

This section will address what is integrated planning and budgeting including what an integrated planning framework looks like, what are the core components, the length of the planning horizon, the key players and their responsibilities.

Environmental Scan

Before any detailed planning can be undertaken, an institution must complete an environmental scan. This part of the workshop will describe what should be included in an environmental scan, how to undertake one and sources of information to complete the environmental scan.

Identify the core

This workshop is adjusted for the knowledge base and level of understanding of the participants. As such, participants will learn the importance of vision, mission and value statements, what should be included in each statement and what makes good vision, mission and values statements.

The Academic Plan

An academic plan must be developed based on the institution's vision and mission. Participants will learn about what is an academic plan, the information that should be contained in an academic plan and who should be engaged within the community when developing the academic plan.

The Capital Plan

The capital plan must be prepared in direct support of the institution's academic plan. Participants will learn about the core components, key drivers of the capital plan and financing of an institution's capital.

Budgeting

Ultimately it is the budget process and the resources that are made available that will enable an institution to drive the academic plan to institutional vision. This section will address various budget and resource allocation models, the importance of consolidated budgeting, how restricted funding can drive unrestricted funding and the importance of transparency in budgeting processes.

Structures and Processes

This is all about the soft issues including how to engage the institution's communities, what type of committee structures you need, who should lead the process, what is the role of the Board, how do you communicate with your communities, what people and resources do you need, and how can you achieve a cultural change.

Performance Measurement

There is no point in developing an integrated planning and budgeting framework if you have no way of measuring and tracking your success. Participants will learn about the different types of performance measures, how performance measures can be linked to the planning processes and examine examples of different performance measures.

Group participation and Case Studies

The workshop will allow for substantial group participation throughout and will include the introduction of case studies to apply the skills learned throughout the workshop.

Workshop Leader



Philip Stack

With 20 years in the health care and post-secondary education sectors, Philip Stack has gained extensive experience in risk management, integrated and

strategic planning, project management, process improvement, organizational change, and financial and budget administration.

Currently Philip holds the position of Associate Vice-President (Risk Management Services) at the University of Alberta. Previously he was the university's Director of Resource Planning, where he led the development and implementation of the University of Alberta's integrated planning framework and prepared the university's \$1.3 billion annual consolidated budget.

Philip has presented at national and international conferences and professional development seminars, and has been invited to numerous institutions to speak on integrated planning and resource allocation models. He is also a faculty member of the Society for College and University Planning where he teaches Step I of the Planning Institute on integrated planning and budgeting. His academic qualifications include a Diploma in Business Administration, BA in Economics & Political Science and Masters in Health Services Administration.

Learn how integrated planning and budgeting can effectively link an institution's academic, financial and capital plans across all levels of the organization from the faculties and administrative units all the way up to the institution's vision and mission.

The Setting

The Delta Ottawa Hotel and Suites

The Delta Ottawa Hotel and Suites is located right in the heart of downtown Ottawa. It is a short walk to Parliament and the Byward Market. The Delta Ottawa Hotel and Suites offers comfortable rooms, a new salt water pool and Jacuzzi and a state of the art fitness facility, all of which will make your stay enjoyable.

To make reservations, please call 1-800-268-1133 or email your reservation to ccampeau@deltahotels.com specifying that you are with the University of Manitoba, CHERD group.

Registration information can be found on our website
<http://umanitoba.ca/centres/cherd/workshops.html>