Monday, July 7

12:00 noon–2:00 p.m.
Registration and Support Desk Open
Sound Room Foyer

2:00–4:00 p.m.
Opening Session
Sound Room
Lisa Trubitt, Assistant CIO for Policy and Communications, University at Albany, SUNY

The Institute faculty will set the stage for the week's agenda. This essential session provides the foundation for the content of the institute. Attendees should make every effort to arrive in time for this vital session.

Objectives:
- Place the Management Program into the context of EDUCAUSE, its Professional Development programs and the EDUCAUSE Institutes
- Set expectations for the week
- Explain how the curriculum functions as a whole

4:00–4:15 p.m.
Refreshment Break
Sound Room Foyer

4:15–5:30 p.m.
Team Formation & Case Assignment
Sound Room
Helen Chu, Director of Academic Technology, University of Oregon

The EDUCAUSE Institute Management Program is structured to encourage all participants to actively engage with each other in several different team activities. Participants will be divided into small work groups to work on highly interactive problem-solving activities. Teams will be introduced to the case study they will work on during the week. On the final evening of the Management program, teams will present their case study solutions in creative and innovative ways.

Objectives:
- Get to know one another
- Break down barriers to communication and sharing in an accelerated manner
- Practice team strategies of planning, collaboration and execution of goals
- Work together to accomplish a specific outcome
- Experience and observe one another in the team dynamic
- Experience the impact of change in resources or leadership

6:00–8:00 p.m.
Reception and Dinner
Rooftop and Maritime Event Center
Tuesday, July 8

7:00–7:45 a.m.
Breakfast
Sound Room Foyer

7:45–8:00 a.m.
Announcements/Community
Sound Room

8:00–9:30 a.m.
Developing Your Strengths
Sound Room
Helen Chu, Director of Academic Technology, University of Oregon

This session will help you identify and build on your strengths, manage around your weaknesses, and recognize your team’s strengths. You will learn how to put your strengths to work, how to build a more balanced team, and how to become a more effective leader. All participants will receive an access code to Strengths Quest and complete an online assessment prior to this interactive session.

Objectives:
- Understand your strengths and explore ways to manage your weaknesses
- Learn ways to leverage your strengths
- Learn strategies for creating a strong team

9:30–10:00 a.m.
Refreshment Break and Office Hours
Sound Room Foyer

10:00–11:30 a.m.
Managing with Emotional Intelligence
Sound Room
Keith McIntosh, Vice Chancellor for Information Technology, Pima County Community College District

Researchers have recognized that while IQ has been a good predictor of academic success, many exceptionally bright people remain remarkably ineffective and unproductive in their professional lives. Emotional Intelligence is notably a characteristic of successful leaders and managers. In this session participants will actively engage in discussion and introduction and reinforcement of the emotional intelligence concept when delegating, communicating and executing in the workplace.

Objectives:
- Define "emotional intelligence" and the associated competencies
- Recognize behavioral strategies that can improve emotional intelligence
- Describe the impact of emotional intelligence in the workplace
- Describe the impact and influence of diversity in the workplace

11:30 a.m.–12:00 noon
Team Study
Various Breakout Rooms

12:00 noon–1:15 p.m.
Lunch
Harbor Dining Room
1:15–2:45 p.m.
Time Management and Delegation
Sound Room
Kathy Monday, Vice President of Information Services, University of Richmond

Successful delegation and effective time management are essential skills that will help managers and their teams succeed. These skills should be practiced daily to achieve individual and team objectives and to accelerate strengths. We will discuss how to focus on the right things at the right time and ways to improve your own delegation skills. We will also share ideas on how to avoid procrastination and manage the inevitable stress that arises in our jobs today.

Objectives:
- Learn how more focused attention on effective time management and delegation can improve personal and organizational performance
- Learn about the most common barriers to effective delegation and how to deal with these
- Better understand how to choose what tasks and responsibilities to delegate
- Discuss and learn ways to effectively coach and support employees to whom you have delegated tasks
- Identify common barriers to effective time management and techniques for addressing these
- Create a framework for making decisions about how to most effectively spend your time
- Learn one or more practical techniques you can use to improve effectiveness

2:45–3:15 p.m.
Refreshment Break and Office Hours
Sound Room Foyer

3:15–4:45 p.m.
Developing a Positive Organizational Culture
Sound Room
Helen Chu, Director of Academic Technology, University of Oregon;
Lisa Trubitt, Assistant CIO for Policy and Communications, University at Albany, SUNY

Culture is a set of behaviors and practices specific to a group of people and has the potential to play a key role in your team’s success or failure. In this session, we will learn to recognize the attributes and behaviors that describe an organization's culture, identify possible solutions for transforming a negative workplace environment into a positive one, and develop strategies for cultivating the positive culture to which you aspire.

Objectives:
- Recognize the importance of a positive organizational culture
- Develop strategies for cultivating the positive organizational culture to which you aspire
- Brainstorm activities you can implement when you return to your organization strategies for cultivating the positive organizational culture to which you aspire

4:45–5:00 p.m.
Community Discussion
Sound Room

5:45–9:30 p.m.
Offsite Dinner
Dinner reservations will be provided; the meal expense is the attendee’s responsibility. Sign up for dinner will take place on Tuesday during breaks.
Wednesday, July 9

7:00–7:45 a.m.
Breakfast and Team Study
Sound Room Foyer

7:45–8:00 a.m.
Announcements/Community
Sound Room

8:00–9:30 a.m.
Organizational Communication
Sound Room
Michael Cato, Chief Information Officer, Vassar College

Communication is a vital part of your success as a manager, helping not only to inform the university community about IT services and plans but also to build relationships with key constituencies.

Objectives:
- Incorporate listening and telling as strategies for effective communication
- Practice the tailoring of messages to an audience for maximum impact
- Identify modes of communication that are most effective for a campus environment
- Define and incorporate principles of good written communication
- Develop communication plans for complex projects

9:30–9:45 a.m.
Refreshment Break
Sound Room Foyer

9:45–11:30 a.m.
Dollars and Sense
Sound Room
Kathy Monday, Vice President of Information Services, University of Richmond

There is growing anxiety in America and the world about the rising cost of higher education. This session will discuss how that concern translates to our world as IT and library managers. It is our job to be careful stewards of the resources entrusted to us to help ensure that we are delivering the best value and return on investment possible. This session will review the major revenue and expense categories common to our institutions and explore some strategies for being effective budget managers.

Objectives:
- Become familiar with the major revenue and expense drivers common to institutions of higher education
- Discuss common IT and library budget challenges and strategies to mitigate these
- Gain an understanding of the goals and value of the budget development process
- Understand how budget and project planning cycles can be coordinated
- Review and discuss models for budget projections
- Discuss how to prepare and present a budget proposal

11:30 a.m.–12:30 p.m.
Lunch
Harbor Dining Room
12:30–3:15 p.m.
Effective Teams
Sound Room
Diane Butler, Director of Information Technology and Access Services, Rice University

This session will teach the basics of effective teams. Through a simulation, you will determine how effective you are and then your team is at planning a project. You will then learn how to improve the team and team dynamics to be able to arrive at effective solutions for any problem or project.

Objectives:
- Define what an effective team is
- Define what each member’s role and responsibility to the team is
- Define, recognize and build a synergistic team for any project
- Within a team, learn how to arrive at effective solutions for problems

3:15–4:00 p.m.
Team Study
Various Breakout Rooms

4:00 p.m.
Dinner on your own
Thursday, July 10

7:00–8:15 a.m.
Breakfast and Team Study
Sound Room Foyer

8:15–8:30 a.m.
Announcements/Community
Sound Room

8:30–10:00 a.m.
Ethics and Core Values
Sound Room
Lisa Trubitt, Assistant CIO for Policy and Communications, University at Albany, SUNY

This interactive session will explore the meaning and importance of ethics for the IT manager. Through the use of scenarios and case studies, several ethical challenges will be examined.

Objectives:
- Understand the complexity of personal ethics
- Recognize that while ethics are a shared concept, individuals may interpret them in unique, personal ways
- Understand the importance of establishing organizational values
- Give examples of ethical dilemmas

10:00–10:30 a.m.
Refreshment Break and Office Hours
Sound Room Foyer

10:30 a.m.–12:00 noon
Employee Life Cycle (Hire, Inspire, Admire, Retire)
Sound Room
Diane Butler, Director of Information Technology and Access Services, Rice University;
Keith McIntosh, Vice Chancellor for Information Technology, Pima County Community College District

This session will discuss the basic concepts of managing the life cycle of an employee, from hiring her to inspiring her to want to perform well, to admiring her by providing feedback, to hopefully retiring her after a long career with your organization.

Objectives:
- Learn how to recruit and hire good employees
- Learn the proper way to onboard new employees and inspire them to do well
- Develop SMART goals and understand how to use them in performance management
- Complete the life cycle of an employee: retiring (hopefully), firing (never fun), or planning for succession (employee leaving)

12:00 noon–1:15 p.m.
Lunch
Harbor Dining Room
1:15–3:00 p.m.  
Employee Life Cycle (Hire, Inspire, Admire, Retire) continued  
Sound Room  
Diane Butler, Director of Information Technology and Access Services, Rice University;  
Keith McIntosh, Vice Chancellor for Information Technology, Pima County Community College District  

3:00–3:30 p.m.  
Reflection Exercise  
Sound Room  
Diane Butler, Director of Information Technology and Access Services, Rice University;  
Keith McIntosh, Vice Chancellor for Information Technology, Pima County Community College District  

Participants will have an opportunity to reflect in an exercise designed to support their return-to-work transition.

3:30–4:00 p.m.  
Refreshment Break and Office Hours  
Sound Room Foyer  

4:00–4:30 p.m.  
Team Study  
Various Breakout Rooms  

5:45–7:00 p.m.  
Reception and Dinner  
Rooftop and Maritime Event Center  

7:00–9:30 p.m.  
Team Study Presentations  
Sound Room  

Participants will put the team skills to use and practice management, communication, and negotiation skills. Participants will increase the likelihood of creating a strong lifelong professional network of associates through their work with teammates on the Case Study.  

Objectives:  
- Demonstrate retention of concepts introduced in all sessions of the Management Program  
- Apply and validate the concepts of an effective team  
- Create an entertaining group presentation
Friday, July 11

7:00–7:30 a.m.
Breakfast
Sound Room Foyer

7:30–9:00 a.m.
Leadership: The Art of Possibility
Sound Room
Michael Cato, Chief Information Officer, Vassar College

Leadership is the unique ability to achieve extraordinary things through the efforts of a dedicated team of professionals. It is the art of turning visions into realities through the chemistry of teamwork. The ability to build and lead a team of professionals is a prime determinant of success for aspiring leaders. A natural tension exists between the fast-paced culture of IT and the slower-paced culture of higher education. The challenge for leaders, administrators and IT professionals is to develop strategies that resolve that cultural tension in ways that create new opportunities, sustain a vibrant learning environment and accelerate the art of possibility. This session will focus on the nature of leadership and the characteristics of truly effective leaders.

Objectives:
- Recognize the definition of leadership, and the fundamental purpose of a leader
- Relate the essential components of truly effective leaders
- Associate the nature and integral relationship between leadership, types of power, and change
- Consider how to assess one's own leadership potential and find opportunities to become better leaders
- Describe the highly dynamic nature of higher education and the challenges facing institutions and leadership

9:00–10:00 a.m.
Professional Development
Sound Room
All Faculty; Joan F. Cheverie, Manager, Professional Development Programs, EDUCAUSE

Professional development can be an afterthought, an optional activity pursued if time is left over from regular job duties. Join the faculty for a panel discussion about how to make ongoing growth an integral part of your professional responsibilities.

Objectives:
- Place the Management Program into the context of EDUCAUSE, its professional development programs, and the EDUCAUSE Institutes
- Broaden the definition of what constitutes professional development
- Identify means of professional networking, including EDUCAUSE programs and resources
- Develop strategies to better address professional and career development needs, for oneself and one's staff

10:00–10:30 a.m.
Closing Session
Sound Room
Lisa Trubitt, Asst. CIO/Policy & Communications, University at Albany, SUNY

This session will provide participants with an opportunity to reflect on the week, express appreciation for teammates, think about the transition back to the work place, and say goodbye.
Diane Butler
Diane Butler is Director of Information Technology and Access Services in Fondren Library at Rice University. She provides visionary leadership, management, planning, policy development, budgeting, and strategic direction for the library’s Information Technology department, Access Services (Circulation, ILL, Front door security, Shelving), and User Experience. Diane’s service to EDUCAUSE includes conference presentations at the local and national level as well as a member of the 2009 Annual Program Committee and the 2011 West/Southwest Regional Committee Chair. She is currently on the faculty for the EDUCAUSE Management Program. She is also actively involved with ALA and the library community by serving and presenting at the LITA National Forum. In her 18 years at Rice University, she has worked in Central IT in various roles, which include Manager for Client Services; she currently works in the library. Diane was a fellow in the 2006 Frye Leadership Institute. She is currently an ARL Leadership Fellow for the class of 2013-2015. She holds a Masters in Business Administration.

Michael Cato
As CIO Michael leads Vassar College’s Information Technology strategy and operations through the Computing & Information Services (CIS) department. Vassar is a selective liberal arts college consistently ranked among the top in the country. CIS is responsible for academic computing, technical infrastructure, faculty and staff support, student computing resources, and administrative information systems. Finding the right opportunities and approaches to integrate technologies into a highly successful curriculum remains one of the great challenges facing IT.

Michael joined Vassar after serving for seven years at the University of North Carolina at Charlotte, most recently as the Interim Vice Chancellor for Information Technology and CIO. At UNC Charlotte Michael led efforts to reorganize and refocus the client facing aspects of the central IT division to better serve the campus community. He conceived and initiated the Future of Student Computing Initiative to dramatically expand services and support for student-owned technologies that expanded WiFi functionality, enabled wireless printing, and adopted an innovative approach to providing virtual access to computer lab systems and software. Successful and innovative endeavors at UNC Charlotte earned Michael the nomination for Employee of the Year in 2009. Prior to joining UNC Charlotte, Michael held several IT positions at UNC Chapel Hill where he was awarded the institution’s IT Award in 2003.

A Leading Change Institute (formerly Frye Leadership Institute) 2012 Fellow, Michael is an Educause Management Institute faculty member, a member of the Society for Information Management, a member of the Information Technology Senior Management Forum, an alum of Leadership North Carolina, and currently serves on the Board of the American Institute of Biological Sciences. Michael earned a Bachelor of Science in Zoology from Andrews University and a Master of Business Administration from Wake Forest University.

Helen Chu
Helen Chu is a Leading Change Leadership Institute Fellow with a background in web development and departmental computing support at Columbia University, instructional technology at UCLA, library information technology at Cal Poly San Luis Obispo. Helen is currently the director of academic technology at the University of Oregon. Her team manages the built and virtual learning environments for campus by providing LMS administration, instructional technology support, learning space design services, classroom technologies, broadcast and video production services. Previously, she managed the Help Desk, hardware repair shop, campus software site licensing, instructional and open access computer labs, and web development in central IT. Helen has a background in 20th Century French Literature and earned a bachelors and masters from UCLA in French. During her graduate years, she integrated technology in French language teaching and served as an instructional technologist during the first deployment of the learning management system at a U.S. university.
Keith W. McIntosh
Keith W. McIntosh (Mac) is the Vice Chancellor for Information Technology (IT) at Pima County Community College District. As Vice Chancellor, he serves as the Chief Information Officer (CIO) for the College and provides highly responsible and complex administrative support to the Chancellor. He leads multiple offices supporting 380 Faculty, 950 Staff, & 69,000 Students (annually). Prior to his role as CIO, Mac served as the Assistant Vice Chancellor (AVC) for IT in an acting role for 14 months at Pima, where he had primary responsibility for the IT departments, services and operations most directly impacting the College’s enterprise computing (instructional and administrative programs). Previously, he was the Director of Technical Services for IT at Pima starting in February 2008. Prior to this he held various progressive leadership and management positions within IT during his distinguished 24.5 year service in the United States Air Force.

Mac has a master’s degree in business administration from Trident University International and a bachelors degree in management information systems from Bellevue University. He is a EDUCAUSE Institute Leadership Program graduate from the class of 2009 and was the inaugural recipient of EDUCAUSE’s “Rising Star Award” in 2011.

Kathryn Joan Monday
Kathy Monday is the Vice President for information services at the University of Richmond. As the chief information officer, she is responsible for managing the university’s information resources and information technology infrastructure. She provides strategic leadership, planning, and management oversight for the information services division including Boatwright Memorial Library; the Center for Teaching, Learning, and Technology; the Digital Scholarship Lab; Systems and Networks; Web Services; Information Systems Security; Telecommunications; Multimedia Support Services; and User Services. Information Services partners with faculty, students, and staff to identify the needs of the university community; provides appropriate infrastructure, resources, and tools to enable work and promote discovery; and helps offices and individuals meet their goals. With the exception of one year when she worked as a consultant with Computer Professionals, Kathy has worked at the university since 1987 in a variety of positions, including programmer analyst, manager of applications services, director of academic technologies and user services, and director of network operations and user services. Kathy received her BS in business information systems from Virginia Commonwealth University. She is a 2002 Frye Leadership Institute Fellow.

Lisa Trubitt
Lisa Trubitt is the Assistant CIO for Policy & Communications at the University at Albany, SUNY, where she focuses on improving and administering IT services to the University community. Current responsibilities include: IT policy development; internal and external communications; fostering relationships and working with various stakeholder and advisory groups; and strategic planning. Her interests range from the professional development and mentoring of staff to exploring creative solutions for organizational challenges and rethinking the role of IT in higher education.

The leader of the EDUCAUSE IT Communications Constituent Group (ITCOMM), Trubitt has given numerous presentations and authored articles on the importance of IT communications. Policy-related activities include presentations and service on the former ICPL Advisory Committee. Trubitt is on the faculty of the EDUCAUSE Management Institute (2013-16) and has served on the EDUCAUSE Annual Conference Program and Professional Development Committees. She is currently a member of the NERCOMP Board and faculty for the Workshop Series for Managers Part 2. She is a trustee of the Capital District Library Council (CDLC) and a Frye Leadership Fellow (2007). Trubitt holds a bachelor of arts in English and Criminal Justice and a master of arts in Criminal Justice from the University at Albany.