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HDI Higher Education Leadership Forum Meeting
July 16 - 19, 2018
Montana State University | Bozeman, MT
Housing: Hapner Hall
Reservations: http://starbright.msu.montana.edu/StarRezConferences
HDI Facilitator: Allyson Rollins | Phone: 719-439-9742 | Email: allyson.rollins@ubm.com
Please Bring: Any necessary information related to the topics on the agenda

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Monday July 16, 2018

	Arrivals: Travel Manifest link to be added for ride sharing
4:00 pm – 6:00 pm	**Montana State University Site Tour**
6:00 pm – 7:30 pm	**Networking Reception**

Tuesday July 17, 2018

7:45 am – 8:00 am	**Meet as a group and travel to campus**
8:00 am – 8:30 am	**Breakfast**
8:30 am – 8:45 am	**Montana State University Welcome** **Presenter: CIO Jerry Sheehan**
8:45 am – 9:00 am	**Welcome to HDI Leadership Forums** **Presenter: Allyson Rollins**
9:00 am – 12:00 pm	**Time Management Workshop** **Presenter: Fancy Mills** Time has become a very valuable commodity for all of us and most feel that there is not enough time in each day to execute on all the tasks and projects in front of us. If we learn to manage our time well, our effectiveness and work life balance will improve. This session will provide time management techniques regarding prioritization, curbing interruptions, planning, scheduling, delegating, conquering procrastination and meeting management. Participants will leave the session with specific techniques for maximizing their time better.

12:00 pm – 1:00 pm	**Lunch**

1:00 pm – 1:45 pm	**Debate: Centralized IT vs. Decentralized IT** **Facilitator: Allyson Rollins** **Team Captains: Mark Fitzgerald and Bill Vriesema** **For context on this session, I** will be sending an **article to review. The group will be spilt into two and expected to actively participate in this debate.** **When leaders think about reorganizing IT, they usually start with two options: To centralize or to decentralize IT. Which organizational design is best? Is there another option? Who decides on the structure?**

1:45 pm - 2:00 pm	**Break**

2:00 pm – 3:30 pm	**Panel Discussion: Centralized IT vs. Decentralized IT** **Facilitator: Allyson Rollins** **Montana State University Panelists:** **Terry Leist: Vice President, Admin and Finance** **Michael Trotter "Trotter": Director of Strategic Initiatives UIT** **Peter Martinson: Manager, Facilities Services IT** **Michael Wright: Director of IT, College of Letters and Sciences** **Joshua Turner: Director User Services, UIT** **This session will give each person an opportunity to ask questions regarding central vs. decentralized IT from panelist.** **For example: What strategy led to the decision to centralize or decentralize IT? How does this impact security? How are the departments set up? What are some strategies to unify IT? What's Worked well, what has been a challenge?**

3:30 pm – 4:00 pm	**Performance Management: Celebrating Success** **Presenter: Lauren Nelson of Southern Methodist University** **Over the past several months, we have implemented a performance management framework for our customer service teams at SMU. By utilizing as much automation as possible, we've provided our teams with the tools needed to easily identify strengths and areas for improvement. Our efforts have yielded more engaging coaching opportunities and improved overall team performance, while increasing employee accountability.**

4:00 pm – 5:00 pm	**Open Discussion / Parking Lot**
	Facilitator: Allyson Rollins
	This is an opportunity for open discussion regarding challenges faced, successes experienced, tools, etc. Take this time to ask questions of your peers, share ideas or generate topics that are not mentioned on the agenda. Use your post it notes to capture your thoughts throughout the day not pertaining to the agenda items. Utilizing the parking lot area in the meeting room.
5:00 pm – 6:00 pm	**Free Time**
6:00 pm – 6:30 pm	**Meet as a group and travel to dinner**
6:30 pm - 8:30 pm	**Dinner**
8:30 pm	**Travel back to Hapner Hall**

Wednesday July 18, 2018

7:45 am – 8:00 am	**Meet as a group and travel to campus**
8:00 am – 8:30 am	**Breakfast**
8:30 am – 10:15 am	**Knowledge Management** **Presenter: Julie Mohr** **Where is everyone in the process, Julie will take you through and exercise of writing content or a Knowledge article, amongst other tools.** **How do you gain buy in? How do you make it a habit? Who maintains the process? What do you do if you do not have a dedicated knowledge manager? Who does what and when? How do this with a small team?** **How do you maintain the quality and accuracy? How do keep it fresh? What about outsourcing KB with other universities?**

	Resource: https://www.comaround.com/en/ComAround-higher-education-eBook-Knowledge-on-campus/
10:15 am – 10:30 am	**Break**
10:30 am – 12:00 pm	**Automation and Artificial Intelligence (AI)** **Presenter: Julie Mohr** **How do you get started? What is the framework? How do you prepare for it? It's not about removing the help desk, it is another tool set, how do you best implement? How can AI be used within any business, what are the capabilities of AI? What are the main elements of AI? How can we shape the future of AI and execute on that? What are some quick wins to implement now? This session will provide a roadmap or guide to walk you through what to think about next in the AI Journey!** **Resource: https://www.brighttalk.com/webcast/15289/311995/feed-the-bots-strategies-to-improve-chat-bots-through-knowledge**
12:00 pm – 1:00 pm	**Lunch**
1:00 pm – 2:15 pm	**The Authentic You** **Presenter: Julie Mohr** **Five Steps to Becoming a More Effective, Engaging, and Authentic Leader. Authenticity in the workplace can create distinction for leaders. But what is authentic leadership and why is it so important? During this session, we will discuss the tenants of authentic leadership and help you develop better insight to your skills as a leader, manager and team player. We will also discuss some of the fallacies about authenticity. Join us in the highly engaging, fun, and introspective journey of how to develop the authentic leader in you.**
2: 15 pm – 2:30 pm	**Break**
2:30 pm – 3:15 pm	**Show and Tell: Service Catalog Tips and Tricks** **Presenters: Group** **How do you categorize? Review the language, how do you name your services? Can you come prepared to share your analytics, how many requests come through the online self – service portal vs. phone or email, chat walk in etc. Do you use your customer base to gain feedback from the quality of your offerings, the language, the**

ease of use, and other factors that make the service catalog meaningful to the customer?

***We will have one volunteer to kick off this discussion and share their service catalog with the group

3:15 pm – 4:30 pm	**Virtual Lab Management**
	Presenter: Josh Turner
	Montana moved to VDI, we will explore what is being done currently and what are the pros and cons.

4:30 pm – 5:00 pm	**Virtual Lab Tour: Montana State University**
	Tour Guide:

5:00 pm – 6:00 pm	**Free Time**

6:00 pm – 6:30 pm	**Meet in the hotel lobby and travel to dinner**

6:30 pm – 8:30 pm	**Dinner**

Thursday July 19, 2018

7:45 am – 8:00 am	**Meet in the hotel lobby and travel to campus**

8:00 am – 8:30 am	**Breakfast**

8:30 am – 9:00 am	**November Meeting Host**
	Presenter: Eliza Mathis from University of South Carolina
	Eliza will share some University and Columbia highlights with the group as she prepares to host the HDI Higher Education group on campus in November.

9:00 am – 10:00 am	**Roundtable Discussion: Deployment Practices**
	Facilitator: Allyson Rollins
	Hardware and Software deployment strategies. Tools and methods used for deployment? Do you utilize a vendor in your deployment practices? Are you using VPP? How do you handle apple IDs? What are you using JAMF, Airwatch etc.? MAC, Chrome books, iPad…How does procurement play into deployment?

Do you follow agile practices? Do you have a deployment checklist? If so what is included on the list? What deployment tools do you use? Do you use continuous integration server? Continous delivery? What KPIs do you monitor for a deployment? Is the deployment process automated?

*If you have a checklist and documented process please be ready to share the information with the group.

10:00 am -10:15 am	**Break**

10:15 am – 11:30 am	**Roundtable Discussion: Organization Initiatives** **Facilitator: Allyson Rollins** What initiatives do you support, or have you executed? Where are you now? What implementations are you working on? Have you come up with any solutions? What recent successes have you experienced? Some examples are: moving to Team Dynamix, Blackboard to Canvas, software purchasing process change, other department support, CRM campus wide, smart boards etc.

11:30 am – 12:00 pm	**Topics Discussion: What is the one thing you found the most value in from this meeting and what would you like to discuss at a future meeting in 2018.**

12:00 pm	**Meeting Concludes**