

**CYCLE OF EXCELLENCE  
CES 2003 PROVIDER CONFERENCE**

**MAY 7, 2003**

**CONVENTION CENTER  
SAN DIEGO, CALIFORNIA**

# CYCLE OF EXCELLENCE CES 2003 PROVIDER CONFERENCE (Schedule)

---

**Welcome - 8:00 am**

**Summary of Core Values**

**The AIA/CES Provider's Conference will address the following:**

## **1. Commitment and Support**

### **Introduction of Commitment and Support Leadership Involvement**

Some of the issue that will be addressed:

- \* How do senior leaders set direction for the education program?
- \* How does leadership address performance expectations and long-term educational programs?
- \* How does leadership review the education program's overall performance?
- \* How does leadership take into account the needs and expectations of key personnel?

### **Strategic Education Plan**

Some of the issue that will be addressed:

- \* How does the education plan support the organization's strategic business plan?
- \* What would a strategic development process look like?
- \* How are the forecasts, models, projections, etc., used to determine the organization's education strategy?
- \* How do expectations address new educational opportunities and/or prepare for new requirements?

## **2. Planning and Analysis**

### **The Assessment Pyramid**

#### **Needs Assessments**

Some of the issue that will be addressed:

- \* How are educational needs identified?
- \* How is a plan developed to address those needs?
- \* How do you determine the most appropriate educational means for missing skills and knowledge?
- \* How do architects' participate in the needs assessment process?

#### **Means to Needs**

Planning & Performance Projection

Some of the issue that will be addressed:

- \* How do you determine what your benchmarks for success will be?
- \* What are measurable goals and projections for the education program in terms of data?

## **3. Design and Implementation**

### **The Architect's Education Universe**

#### **Goal Setting**

Some of the issue that will be addressed:

- \* How do you set overall educational goal so that they are current with changing business needs and maintained to benefit the architects' educational growth and professional development?
- \* What is an education program goal?
- \* Do your education program/service goals change annually?

#### **Learning Objectives**

Some of the issue that will be addressed:

- \* How do you determine what the learning objectives will be?
- \* Is there standard language or a format for learning objectives?

#### **Program Design**

Some of the issue that will be addressed:

- \* How do you design your overall programs and activities?
- \* How are education activities and services designed and who designs them?
- \* How are HSW activities determined?
- \* How are program-delivery processes determined, including methods, topics, and resources used?

## **Scholarship Sponsors Lunch and Presentations 12:00 – 1:00**

### **Implementation/Delivery Processes**

Some of the issue that will be addressed:

- \* How are educational activities delivered to the target audience?
- \* How does your organization manage education to ensure that they meet the needs of architects?
- \* How are HSW programs monitored to ensure they meet requirements?

### **Marketing & Promotion**

Some of the issue that will be addressed:

- \* How are educational marketing plans developed and what are the strategies used?
- \* How are the specific promotional and advertising vehicles used?

## **4. Resources and Records**

### **Human Resources**

Some of the issue that will be addressed:

- \* How does the organization identify, develop, and support program designers and faculty?
- \* What qualifications do you look for?
- \* Who is involved: e.g., program designers, instructors, facilitators; what are their qualifications?
- \* How do you train the trainers and evaluate them?
- \* How do you support trainers and help them improve their performance?

### **Record Keeping and Reporting**

Some of the issue that will be addressed:

- \* How are the learning records processed?
- \* Who is responsible for record keeping?
- \* How does the system/process ensure timeliness and accuracy?
- \* What measures are in place to ensure proper documentation for AIA and/or state licensing?

## **5. Evaluation and Improvement**

### **Evaluation of Individual Events**

Some of the issue that will be addressed:

- \* For individual events what is the process for determining how the learning reach stated objectives.
- \* How do you determine the architects' satisfaction?
- \* How do you follow up with architects to ensure prompt and actionable feedback?
- \* How do you ensure that event problems are resolved, including tracking and documenting improvement?

### **Evaluation of Organization's Education System**

Some of the issue that will be addressed:

- \* How do you evaluate professional development's contribution to the organization's performance?
- \* What are the processes you use to evaluate performance of its educational system?
- \* What are your performance results for education, service, program, and licensure compliance?
- \* How do you update your evaluation process to keep current with changing educational needs?

### **Continuing Education Financial Results**

Some of the issue that will be addressed:

- \* How is the PD program evaluated and improved in terms of the organization's financial performance?
- \* How are the summary of revenues and expenses evaluated?
- \* How are the organization's financial resources expended on educational programs?

### **Q & A Summary, Panel of Faculty**

### **Conference Summary 3:45 – 4:00 pm**

## **The 2003 CES Provider Conference Faculty:**

Marge Anderson, Energy Center of Wisconsin, winner of the 1998 & 2002 Professional Organization Award  
manderson@ewc.org

Tony Bartorillo, TRACO  
tony.bartorillo@traco.com

Ron Blank, Ron Blank Associates, winner of the 2002 Stakeholder-Commercial Award  
ron@ronblank.com

Jill Brown, FreemanWhite, winner of the 2001 Large Firm Award  
jbrown@freemanwhite.com

Bill Dexter – W.F. Dexter Company  
wdexter@pacbell.net

Audrey V. Goodwin, Gresham, Smith & Partners, winner of the 2002 Large Firm Award  
audrey\_goodwin@gspnet.com

Amy Kobe- AIA Columbus, winner of the 2001 AIA Component Award  
akobe@aiacolumbus.org

Thom Lowther, Ed.S., AIA-Continuing Education Systems  
tlowther@aia.org

Jean Valence, FSMPS, Blackridge Ltd.  
jrvalence@blackridge.com

Mike Waldinger- AIA Illinois  
mike\_waldinger@ameritect.net

Sonja Winburn – Rosser International, winner of the 2000 Large Firm Award  
swinburn@rosser.com