

# Next Generation Chief Business Officer

San Diego, California

November 3, 2016 | 8 a.m. – 5 p.m.  
Hilton San Diego Airport/Harbor Island



JOIN US FOR  
PROFESSIONAL DEVELOPMENT WORKSHOPS

## Join us in beautiful San Diego for an interactive workshop with Larry Goldstein

Higher education is experiencing tremendous turnover due to retirements and transitions. A recent NACUBO study indicates that a sizable number of CFOs identify retirement as their next job change. And of those, more than a third plan to do so within three years. WACUBO recognizes the value of preparing current staff to make the leap to top business/finance positions and is offering this workshop to further that effort. We'll address a variety of issues of concern to those aspiring to move to these positions. **Who should attend? This workshop is targeted to non-CFO senior staff in the finance/business division of colleges and universities.**

### Workshop Description

Through a combination of presentations and interactive sessions, participants will gain insights to help them assess whether they are ready for what's expected from the CFO. What have we learned about how successful CFOs operate? What are the key responsibilities and relationships critical to a CFO's success? How do people effectively address the challenges of interacting with others who operate differently from themselves? What steps will help me move to the next level on my career journey? These and other topics will be explored in this intensive one-day program.

### Learning Objectives

- Development of strategic thinking skills including getting beyond the day-to-day operational challenges encountered in a higher education institutional setting
- Finding comfort with and appropriately dealing with the level of ambiguity existing in today's complex organizations
- Exploration of the range of issues confronting CFOs in academic settings
- Understanding how to deal with complex ethical issues with multifaceted and complementary solutions
- Exploration of leadership style and its implications for the strategic challenges confronting institutions

WESTERN ASSOCIATION OF COLLEGE AND UNIVERSITY BUSINESS OFFICERS





## Workshop Agenda

- 8:00 – 8:30 Registration and Breakfast**
- 8:30 – 9:00 Introductions**
- 9:00 – 10:00 Leadership Overview**  
A presentation covering the roles, skills, and qualities required for success in higher education leadership positions.
- 10:00 – 10:15 Break**
- 10:15 – 11:15 Future Timeline**  
An interactive session requiring participants to consider issues, events, and trends that will affect higher education over the next 10 years.
- 11:15 – 12:00 The CFO's Role**  
This session examines the typical responsibilities of a chief business officer.
- 12:00 – 1:00 Lunch**
- 1:00 – 2:00 Understanding Our Differences**  
This session utilizes a tool that helps participants understand their operating style and the impact it has on their ability to influence.
- 2:00 – 3:00 Keeping the President Off the Front Page**  
This session utilizes vignettes that portray potential ethical issues and requires participants to develop solutions to the challenges presented. A short presentation of preventive measures is offered.
- 3:00 – 3:15 Break**
- 3:15 – 3:45 Career Mapping**  
During this interactive session participants will examine the path that brought them to their current position and, working with a thought partner, chart the path to their future.
- 3:45 – 4:15 Exceptional Teams Survey**  
This session examines the critical success factors for teams. Insights will be shared based on the results of the participants' completion of an assessment tool.
- 4:15 – 4:45 Meeting Effectiveness**  
This session examines the critical elements of effective meetings. It relies on an instrument developed to assess meeting effectiveness.
- 4:45 – 5:00 Wrap-up**



## Meet the Instructor

**Larry Goldstein**  
President  
Campus Strategies, LLC

Larry Goldstein is the president of Campus Strategies, LLC, a higher education management consulting firm. Campus Strategies, LLC clients include community colleges, liberal arts colleges, research universities, as well as numerous higher education associations and companies serving higher education.

He also is involved in various professional activities and has served on national committees and boards including the Governmental Accounting Standards Advisory Council, the American Institute of Certified Public Accountants' Not-for-Profit Organizations Expert Panel, and the Advisory Board for the The Center at Arizona State University.

Goldstein writes and speaks frequently on various subjects related to higher education accounting, finance, and management. He is the author of *A Guide to College and University Budgeting*, fourth edition and has co-authored several publications including NACUBO's *Financial Accounting and Reporting Manual for Higher Education* and *Presidential Transitions: It's Not Just the Position, It's the Transition*. He is a recipient of the Daniel D. Robinson Award for his contributions to higher education accounting and financial reporting.

Immediately prior to establishing Campus Strategies, LLC, Goldstein served as senior vice president and treasurer of the National Association of College and University Business Officers (NACUBO). He joined NACUBO after spending 20 years in higher education financial administration. In his last campus position, he served as the University of Louisville's chief financial officer. Before that, he held administrative appointments with The University of Chicago, the School of the Art Institute of Chicago, and the University of Virginia. Prior to entering higher education financial administration, he was a tax associate with Touche Ross & Company.

Goldstein, a certified public accountant, earned a Bachelor of Accountancy degree from Walsh College and a Master of Science degree from the University of Virginia.

# WACUBO Workshop Registration

Register online at: [www.wacubo.org/workshops](http://www.wacubo.org/workshops)

Workshop Options	Member	Non-Member
Next Generation Chief Business Officer	\$375	\$425

**If special accommodations are required, please advise at the time of your registration.**

San Diego offers every kind of activity imaginable; from world-renowned attractions, unlimited outdoor recreation, a thriving arts and culture community, sightseeing tours and award-winning restaurants, you're sure to find a host of things to entertain and inspire. Enjoy some of these San Diego amenities after class!

- Shop at Horton Plaza or Seaport Village
- Soak up the sun at Mission Bay or take a run on Pacific Beach
- Visit the San Diego Zoo or experience Sea World
- Stroll through the historic Gaslamp Quarter or Old Town San Diego

## Workshop Contact:

Linda Cordier: [lcordier@pima.edu](mailto:lcordier@pima.edu)  
Nancy Herbst: [NHerbst@ucsd.edu](mailto:NHerbst@ucsd.edu)

## Cancellation Policy

Refunds will be given upon written request 30 days prior to program, less a \$50 cancellation fee. Substitutions are allowed at any time at no additional charge.

Registration in this workshop includes the following:

- Breakfast, lunch, and snacks – November 3, 2016



### CPE Information

Attendees of this workshop will be eligible to earn approximately 8.4 CPE units in Personal Development.

Note: CPE's are subject to adjustment due to minor schedule modifications.

Please visit [www.wacubo.org/cpe](http://www.wacubo.org/cpe) for more information. The Western Association of College and University Business

Officers (WACUBO) is registered with the National Association of State Boards of Accountancy (NASBA), as a Quality Assurance Service sponsor of continuing professional education. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding QAS program sponsors may be submitted to NASBA through its website: [www.learningmarket.org](http://www.learningmarket.org).

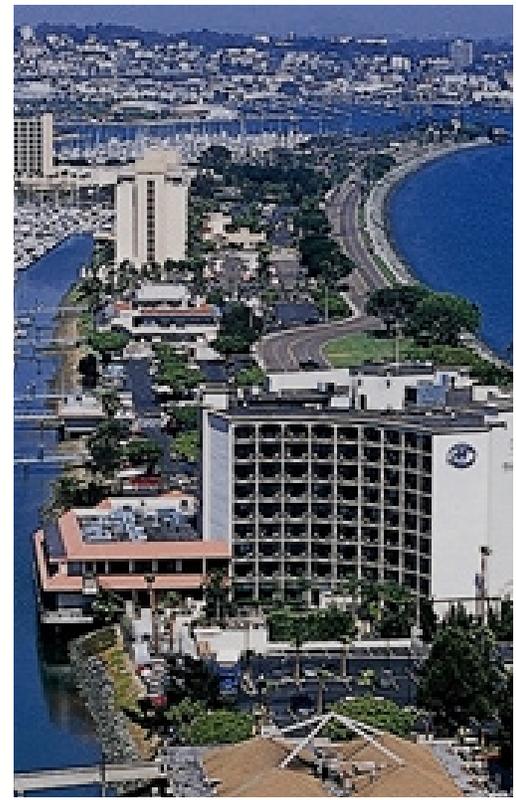


Photo courtesy of Hilton San Diego Airport/Harbor Island

## Hilton San Diego Airport/Harbor Island

1960 Harbor Island Drive  
San Diego, CA 92101

### Book Your Room

- WORKSHOPS FILL QUICKLY, please reserve workshop before booking room and/or travel
- Room rate for WACUBO guests: \$179 per night\* rate guaranteed until October 14, 2016
- Reserve room at [http://www.hilton.com/en/hi/groups/personalized/S/SANAH-HF-WACUBO-20161102/index.jhtml?WT.mc\\_id=POG](http://www.hilton.com/en/hi/groups/personalized/S/SANAH-HF-WACUBO-20161102/index.jhtml?WT.mc_id=POG)
- Or call 619-542-5130 and mention group code: WACUBO

\* Based on single occupancy. Rate is exclusive of applicable state and local taxes, fees, and assessments. WACUBO rate will be honored for 2 days before and after workshop, based on availability.

Information on transportation from airport can be found by visiting <http://www.san.org/parking-transportation>

Parking at the Hotel:

Self parking \$18 overnight/\$5 day use