

# Shared Services with Change and Continuous Improvement

August 15 - 17, 2016 | 8:30 a.m. – 4:30 p.m.  
The Benson Hotel, Portland OR



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PROFESSIONAL DEVELOPMENT WORKSHOPS



**The Shared Services with Change and Continuous Improvement workshop is presented through a collaborative partnership between WACUBO and NCCI (Network for Change and Continuous Innovation: Higher Education's Network for Change Leadership).**

## **Workshop Description:**

Colleges and universities across the country are facing the daunting task of transitioning to a shared services model. Two change leaders from the University of California (Davis and Berkeley) will share best practices developed over the past several years that address the challenge of designing, implementing, and sustaining a shared services center. Through an interactive session, you will learn the key points about building a model that meets the needs of your campus, managing the migration from the old organization to the new, and embedding a culture of continuous change to reap the full benefits of your investment.





## Learning Objectives

- Develop knowledge of shared services, including what “is” and what “isn’t” shared services
- Compare models of shared services and difference from centralization
- Describe steps to implement shared services
- Understand role of stakeholders in implementing shared services
- Explore concepts related to success factors for managing shared services
- Assess your organization’s capacity for change
- Understand the roles in making successful change
- Learn several approaches for engaging change leaders on your campus
- Manage resistance and other change behaviors
- Make a compelling case for change
- Sustain change and establish a culture of continuous improvement

## Key Takeaways

- Key concepts related to what “is” shared services and what “isn’t”
- Why implement shared services
- Challenges and opportunities in implementation and in management of shared services
- Knowledge of why organizational change is so challenging
- Knowledge and tools to help you develop a roadmap for effectively managing change in your organization
- Knowledge and tools to make change stick
- Templates and strategies that you can use right away

## Who Should Attend Full Jumbo Workshop

- Individuals at all levels who have responsibility in the decision, design, and/or implementation of a successful shared services center at a college or university. Project managers, change managers, change agents, decision makers, administrative leaders will all benefit from this workshop.

## Workshop begins each day at 8:30 a.m. and ends at 4:30 p.m.

Day 1: Shared Services – full day

Day 2: Shared Services wrap-up and transition to Change and Continuous Improvement

Day 3: Change and Continuous Improvement – full day

## Meet the Instructors



**Sara Reed,  
Ed.D.**

Dr. Sara Reed is the Director of the UC Davis Shared Services Center. She joined UC Davis in 2012 as the Chief Administrative Officer for the BFTV Cluster, supporting four academic departments. In July 2014, Sara became the Director of the Shared Services Center, providing partner-focused support services, including human resources, payroll, purchasing, accounts payable, and customer service for 8,000 employees and over 200 departments.

Sara has served the UC Davis community by serving in a leadership role for the Administrative Managers Group, leading the foundation of a Veteran Constituency group, working to create a networking program across the Davis/Sacramento campuses, and teaching leadership workshops for undergraduate students. She was recognized in 2016 as a Chancellor STAR for her efforts.

Sara served as an active duty military officer, leading teams across the globe, and continues to serve as a Reserve officer. She earned a doctorate from Drexel University, MA.Ed. from CSU – Sacramento, M.S. from Troy State, and BA from University of Minnesota.



**Peggy Huston,  
MBA**

Peggy Huston is an expert in organizational development in higher education. She has more than 25 years of experience in leadership, project management, change management, informational technology, and business management. Peggy has been employed at UC Berkeley for 15 years. She currently holds the position of the Chief Operating Officer for Campus Shared Services where she is managing the continuous improvement of this relatively new campus organization. Previously she was the Director of the Operational Excellence Program, a 4-year effort to improve the effectiveness and efficiency of campus administrative operations.

Peggy holds a BS in Business Administration and Computer Information Systems, as well as an MBA in International Business from California State University, East Bay. She holds a Project Management certification from UC Extension. In 2014, she received the Leaders of Change award from the Network for Change and Continuous Innovation (NCCI) in Higher Education.

# WACUBO Workshop Registration

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

Workshop Options	Member	Non-Member
<b>SINGLE WORKSHOP OPTION</b> (3-Day Workshop)	\$600	\$650

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

## Plus, Enjoy Portland Amenities After Class!

- Shopping, dining, and entertainment are all within walking distance of hotel.
- Visit the Pearl District, Pioneer Square, or stroll around downtown.
- Local points of interest include; Washington Park, Oregon Zoo, Pittock Mansion, Tom McCall Waterfront Park, Portland Art Museum, and much, much more.

## Workshop Contact:

Dee Wendler: [Dee.Wendler@oregonstate.edu](mailto:Dee.Wendler@oregonstate.edu)

Linda Cordier: [lcordier@pima.edu](mailto:lcordier@pima.edu)

Monica Kane: [mekane@uaa.alaska.edu](mailto:mekane@uaa.alaska.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 – August 15, 16, and 17

## CPE Information



Attendees of this workshop will be eligible to earn approximately 22 CPE units in Management Advisory Services.

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).

# the benson

a coast hotel - portland, oregon

309 SW Broadway  
Portland, Oregon 97205



Courtesy of the Benson Hotel

## Book Your Room

- **WORKSHOPS FILL QUICKLY, please reserve Workshop before booking room and/or travel**
- **Room rate for WACUBO guests: \$189 per night\* Rate guaranteed until July 15, 2016**
- **To reserve room: Call 888-523-6766 or email [reservation@bensohotel.com](mailto:reservation@bensohotel.com)**  
**IMPORTANT - Please identify yourself as part of WACUBO.**

\*Based on double occupancy. Current Multnomah County room tax of 12.5% & 2% City of Portland Tourism Improvement District assessment will be charged in addition to the room rates set forth above.

## Transportation from Airport

Taxi, shuttle service, and MAX Light Rail is available from Portland International Airport.

## Parking at the Hotel

Valet parking is \$40 per night.