

# Winter 2016 Workshop

## Three C's of Higher Education Budgeting: Concepts, Creation, and Connections

January 13-14, 2016 | 8:30 a.m. – 4 p.m.

Phoenix, Arizona



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PROFESSIONAL DEVELOPMENT WORKSHOPS

### Course Description

This two-day highly interactive workshop will focus on higher education budgeting concepts, budget development and management, and its connection to an organization's mission and goals. Through budgeting process case studies presented at the workshop, participants will be provided with practical tools and strategies to apply to that they can immediately apply to their day-to-day work.

### Learning Objectives

By the end of this workshop participants will:

- Explore the concepts and components of a higher education budget process
- Create a budget for a sample program or department
- Review tools and techniques for on-going budget management
- Propose and evaluate budget options through workshop case studies

### Key Takeaways

- Recognize connections between the budgeting process and institutional mission and goals
- Learn about real world, complex examples from financial experts in higher education

### Who Should Attend

This workshop is designed for professionals who are new to higher education, those with little exposure to budgeting, and those responsible for financial oversight in department and academic units and who want to enhance their knowledge in budgeting processes and fiscal stewardship.

### Meet the Instructors

#### Lisa Frace

Lisa has over 25 years of experience in finance, treasury, strategic planning and budget management. She is currently the Associate Vice President for Budget and Planning and Chief Budgeting Officer for Arizona State University. Prior to joining ASU, Lisa spent 12 years with Amtrak. Lisa holds an MBA with concentrations in finance and marketing from the Smeal College of Business at Pennsylvania State University, as well as a BS in Health Planning and Administration from Penn State.

#### Linda Kosten, PhD

Linda is the associate provost of planning, budget, and analysis at the University of Denver. Linda has served DU for 22 years, in housing and residential education; arts, humanities, & social sciences; and since 2006 at the University level. She has a PhD and MA in higher education from DU. Linda's book, *Decentralized Budgeting and the Academic Dean: Perspectives on the Effectiveness of Responsibility Center Management* (2009), explores the effectiveness of RCM from the perspectives of 146 deans at 27 universities. Linda is adjunct faculty in the DU graduate program on higher education finance, institutional research, and enrollment management.



# WACUBO Workshop Registration

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

Workshop Options	Member	Non-Member
THREE C'S OF HIGHER EDUCATION BUDGETING	\$350	\$400

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

## Plus, Enjoy Phoenix/Scottsdale Amenities After Class!

- Chase Field
- ASU/Mill Avenue/Tempe Town Lake
- Old Town Scottsdale/Scottsdale Fashion Square
- Phoenix Zoo
- Camelback Mountain
- NCAA College Football Playoff National Championship game will be held at University of Phoenix Stadium on Monday, January 11, 2016!

## Workshop Contact:

Jeanette Perez: [perezjr@asu.edu](mailto:perezjr@asu.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

- Continental Breakfast, lunch, and snacks – January 13, 2016
- Continental Breakfast, lunch, and snacks – January 14, 2016

*Please advise as soon as possible if you have any dietary restrictions*

## CPE Information



Attendees of this workshop will be eligible to earn approximately 12 CPE units in Business Management and Organization.

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).

## Hilton Scottsdale Resort & Villas

6333 North Scottsdale Road  
Scottsdale, AZ 85250  
1 (480) 948-7750



## Book Your Room

- **WORKSHOPS FILL QUICKLY**, please reserve Workshop before booking room and/or travel
- Room rate for WACUBO guests: \$209\*
- To reserve room: [Click here](#) or call 480-948-7750 and mention WACUBO

\* Based on single occupancy. Rate guaranteed through December 12, 2015, subject to availability. WACUBO rates good for 3 days before and after workshop.

## Transportation from Airport

Super Shuttle – approx. \$18, Taxi's - \$38±

## Parking at the Hotel

Complimentary valet and self-parking is available

## Hotel Amenities

Complimentary Shuttle within 3 mile radius  
Hundreds of restaurants/shops within walking distance

