

Fall 2016 Workshop Series

October 4-6, 2016 | 8:30 a.m. –
4:30 p.m. Hyatt Regency Orange
County



JOIN US FOR
PROFESSIONAL DEVELOPMENT WORKSHOPS

Build Your Own Schedule: 1-Day, 2-Day, and 3-Day Options

Choose from the following six
Professional Development Workshops
offered over three days!

- New to Higher Education (1 day)
- Human Resources (HR) Toolkit (1 day)
- Lean Process Improvement (1 day)
- Higher Education Budgeting Basics:
Concepts, Creation and Connections (2 day)
- Change and Project Management (2 day)
- Beyond the Basics: Higher Education
Accounting and Reporting (2 day)



Fall 2016 Workshop Series Schedule

Tuesday 10/4/16	Wednesday 10/5/16	Thursday 10/6/16
<p>A Beyond the Basics: Higher Education Accounting and Reporting (Tu/W) 8:30 am – 4:30 am Jeff West and Margaret Henry</p>		
	<p>B Higher Education Budgeting Basics: Concepts, Creation, and Connections (W/Th) 8:30 am – 4:30 pm Lisa Frace and Linda Kosten</p>	
<p>C Lean Process Improvement (Tu) 8:30 am – 4:30 am Robyn Pennington and Alexis Naiknimbalkar</p>		
<p>D New to Higher Education (Tu) 8:30 am – 4:30 pm Glen Nelson</p>		
		<p>E HR Toolkit (Th) 8:30 am – 4:30 pm Carina Celesia Moore and Lisa Terry</p>
	<p>F Change and Project Management (W/Th) 8:30 am – 4:30 pm Bridget Wikidal/Scott McAllister <i>*Prerequisite Lean Process Improvement</i></p>	

<p>Beyond the Basics: Higher Education Accounting and Reporting (2-Day) Jeff West and Margaret Henry</p> <p>Course Description: Get beyond the basics of accounting and reporting and expand your knowledge and effectiveness as a leader in higher education finance with this workshop from WACUBO. This workshop offers the attendee a solid review of the theoretical framework of higher education accounting and reporting. Operational, investing, and financing activities of the institution are reviewed – along with the impact of these activities on the financial statements. Additional information on analyzing and interpreting financial statements will be provided, along with excellent networking opportunities with fellow colleagues throughout the WACUBO region and beyond who will be in attendance.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> Understand the purpose of fund accounting systems and its relevance in today’s reporting formats Explain differences among operating and non-operating activities Analyze recognition issues pertaining to revenue and expenses Hear about relevant laws and account standards that govern endowments, gifts, and restrictions Learn the differences between financing capital activities and operating activities Identify the basic financial statements and information included in the financial reports Identify how to read and understand the basic financial statements <p>Who Should Attend: This course is intended for those who already have a basic understanding of the principles, but want to brush up on or expand their knowledge in the arena – including updated information and pronouncements from FASB, GASB, and the AICPA. Suggested Prerequisite: NACUBO’s Essentials of College & University Accounting (ECUA).</p> <p>CPE Information: Attendees of the workshop will earn 15 CPE units in accounting. Note: CPE’s are subject to adjustment due to minor schedule modifications.</p>	<p>Higher Education Budgeting Basics: Concepts, Creation, & Connections (2-day) Lisa Frace and Linda Kosten</p> <p>Course Description This highly interactive workshop will focus on basic 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 their day-to-day work.</p> <p>Learning Objectives</p> <ul style="list-style-type: none"> 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 Recognize connections between the budgeting process and institutional mission and goals. <p>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 departmental and academic units and who want to enhance their knowledge in budgeting processes and fiscal stewardship.</p> <p>CPE Information: Attendees will be eligible to earn approximately 7.5 CPE units in budgeting. Note: CPE’s are subject to adjustment due to minor schedule modifications.</p>	<p>Lean Process Improvement (1-Day) Robyn Pennington and Alexis Naiknimbalkar</p> <p>Course Description: Every organization is a collection of processes. These processes are the natural business activities you perform that produce value, serve customers and generate results. Many organizations follow dated policies and procedures because of the tradition. Process improvement techniques can greatly increase productivity and efficiency and/or reduce the cost of operations by eliminating waste and non- value added steps and uncovering the root causes of systematic quality issues.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> Understand Lean Thinking Create “current state” and “future state” process maps with metrics Identify and reduce non- value added steps (Waste) Apply Lean tools/methodologies (Waste Walk, A3 Thinking) <p>Key Takeaways:</p> <ul style="list-style-type: none"> Templates and strategies that you can use right away Knowledge and tools for creating a process map Tools for reducing waste and increasing efficiency Ways to document potential improvements <p>Who Should Attend: The workshop is designed for those new to lean concepts and process mapping. Participants should come prepared to map/analyze one of their processes. No prerequisites required.</p> <p>CPE Information: Attendees of this workshop will be eligible to earn approximately 7.5 CPE units in Management Advisory Services. Note: CPE’s are subject to adjustment due to minor schedule modifications.</p>
<p>New to Higher Education (1-day) Glen Nelson</p> <p>Course Description: If you are new to higher education and have experience working in a private company or publically traded company, you have no doubt noticed a number of similarities and differences in how business is conducted within your institution. Corporations, whether privately or publically held, operate with one primary outcome-maximize shareholder wealth. Universities and Colleges are large organizations which operate like a business, but with many different motivations and desired outcomes. This workshop, designed for the new higher education employee, will explore the similarities and differences faced by a professional when beginning a career at a college or university. This includes anyone interested in enhancing their knowledge of the higher education enterprise, processes, and stewardship.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> Understand where we came from, who we are, and where we are headed Explore concepts and components of higher education Explore shared governance and board relationships Identify processes occurring around the college and university in addition to those involved in the “business transactions” Gain a basic understanding of authoritative guidance governing unique legal, human resources, and fiscal activities of colleges and universities <p>Who Should Attend: Individuals of all levels and from all divisions within a college or university who have a desire to improve performance by gaining a better understanding of their operating environment will benefit from participation. The workshop is designed for those who are new to higher education or those who wish to gain a better understanding of the higher education environment.</p> <p>CPE Information: Attendees of the workshop will earn 7.5 CPE units in personal development. Note: CPE’s are subject to adjustment due to minor schedule modifications.</p>	<p>HR Toolkit (1-day) Carina Celesia Moore and Lisa Terry</p> <p>Course Description: Whether you supervise others or are an individual contributor in your organization, building an essential human resources toolkit means focusing on the people side of the work equation. This highly interactive workshop offers you a day to bolster your people management skills through interactive and reflective activities. You will leave with a new network of colleagues, greater skills and a greater understanding of how to put your own development plan into action.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> Assess your thinking and working styles using the Whole Brain model and explore how all styles contribute positively to the workplace Explore how to create and increase team motivation Discover how to master difficult conversations Manage the chaos of change <p>Who Should Attend: This workshop is designed for higher education professionals who want to increase their human resource knowledge and skill in the areas of working styles, team motivation, communication and change management. Managers, supervisors and individual contributors will all benefit from this workshop.</p> <p>CPE Information: Attendees of this workshop will be eligible to earn approximately 7.5 CPE units in Business Management and Organization. Note: CPE’s are subject to adjustment due to minor schedule modifications.</p>	<p>Change and Project Management (2-day) Bridget Wikidal and Scott McAllister</p> <p>Course Description: Today’s higher education environment is confronted with challenges and forces for change that are rapid and constant. How “change ready” is your university and how effective are your change initiatives? Successful organizational change requires that individuals embrace change and strategic initiatives more quickly and effectively, and adopt new technology with less productivity impact. Establishing project and change management methods and strategies reduces risk, cuts costs and significantly improves business outcomes. A university-wide project management and change management capability means effective practices are embedded into your institution’s roles, structures, processes, projects and leadership competencies. Many higher education institutions are successfully building change management capability using the Prosci ADKAR Model, providing best practices, skills and tools to senior executives, faculty, middle managers and staff.</p> <p>PREREQUISITE: Attendees must have already taken Lean Process Improvement</p> <p>Key Takeaways:</p> <ul style="list-style-type: none"> Templates and strategies that you can use right away Knowledge of essential project management and change management concepts and terminology Knowledge and tools for initiating, planning, executing, controlling and closing a project Knowledge and tools for developing and executing a change management strategy and plan Intro to a model for individual and organizational change <p>Who Should Attend: This workshop is designed for those who attended the LPI Workshop. It is designed for individuals at all levels of the institution with a desire to manage a process improvement project. Participants should come prepared to use their process improvement work from the Lean Process Improvement workshop as a foundation.</p> <p>CPE Information: Attendees of this workshop will be eligible to earn approximately 15 CPE units in Management Advisory Services. Note: CPE’s are subject to adjustment due to minor schedule modifications.</p>

WACUBO Workshop Registration

Register online at: www.wacubo.org/workshops

1-Day Workshop Options: (\$275 members / \$325 non-members)

- D: New to Higher Education (Tu)
- C: Lean Process Improvement (Tu)
- E: HR Toolkit (Th)

2-Day Workshop Options (\$400 members / \$450 non-members)

- A: Beyond the Basics: Higher Education Accounting & Reporting (Tu/W)
- B: Higher Education Budgeting Basics (W/Th)
- F: Change and Project Management (W/Th)
- DE: New to Higher Education (Tu) / HR Toolkit (Th)
- CE: Lean Process Improvement (Tu) / HR Toolkit (Th)

3-Day Workshop Options (\$600 members / \$650 non-members)

- AE: Beyond the Basics: Higher Education Accounting & Reporting (M/Tu) / HR Toolkit (Th)
- BE: Beyond the Basics Higher Education Budgeting Basics (W/Th) / Lean Process Improvement (Tu)
- BD: Higher Education Budgeting Basics (W/Th) / New to Higher Education (Tu)
- FC: Change and Project Management (W/Th) / Lean Process Improvement (Tu)
- FD: Change and Project Management (W/Th) / New to Higher Education (Tu)

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

Plus, Enjoy these Orange County Amenities After Class!

- Disneyland Parks and Downtown Disney
- Knotts Berry Farm
- Much, much, more...

Workshop Contacts:

Jeanette Perez: perezjr@asu.edu
Betsy Clark: betsy.clark@usu.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 - October 4-6, 2016



CPE Information

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

Please visit 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.



Photo courtesy of Hyatt Regency

Hyatt Regency Orange County

11999 Harbor Blvd,
Garden Grove, CA 92840

Book Your Room

- WORKSHOPS FILL QUICKLY, please reserve Workshop before booking room and/or travel
- Room rates for WACUBO guests: \$185 per night* - **Room rate is valid through Sept 12, 2016**
- To reserve room: 888-421-1442 and mention WACUBO or book room online at: <https://resweb.passkey.com/go/wacubooct2016>

*Based on single occupancy plus applicable state and local taxes 17% (tax subject to change and a \$2.00 CA Tourism Tax), will be charged in addition to the room rates set forth above.

Parking at the Hotel:

\$14 daily

Transportation from the Airport:

Taxi: Taxi service is available at the hotel. Rates may vary.

Rental Car: Enterprise Rent-A-Car offers discounted rates for hotel guests. Reserve your car online for this deal.

Super Shuttle: \$11 per person/one way