

WACUBO

Western Association of College and University Business Officers

Workshop Series

September 19-21, 2016 - Salt Lake City, Utah

Attend One or Both of the following workshops

Negotiation

Negotiation skills are critical throughout all aspects of colleges and universities especially in creating value for your unit. Competition for resources, space, funding, equipment, and opportunities require techniques for successful negotiation. This workshop is designed to help business managers understand the negotiation process while learning strategies for analysis, develop decision making processes, and define methods for negotiations. You will learn how to define interests, set priorities, and develop mutually beneficial strategies for all parties.

See the following pages for more details

Unit & Academic Business Officer (UABO)

The world of the academic and unit business officer is changing—are you prepared? Attend this interactive workshop to build your foundation for success. Discover new ways to support and advance your organization.

See the following pages for more details

Online Course Registration

www.wacubo.org/workshops

Workshop	Member	Non-Member
Both Workshops (September 19-21, 2016)	\$600	\$650
Negotiation ONLY (September 19-20, 2016)	\$400	\$450
UABO ONLY (September 20-21, 2016)	\$400	\$450

Please advise at the time of registration if special accommodations are required.

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.

Workshop Contacts:

Betsy Clark Betsy.Clark@usu.edu

Jeannette Taylor jeannette.taylor@utah.edu

Marriott Downtown at City Creek

Group rate of \$189 per night.

Rate will be offered based on availability and is only available until August 29, 2016.

For reservations call (800) 228-9290 or Click [here](#)



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Negotiation (September 19-20, 2016)

Instructors



Nichol Luoma is the Associate Vice President of University Business Services, Sustainability Officer and Chief Procurement Officer for Arizona State University. In 2015 under her leadership, ASU earned the National Procurement Institute's Achievement of Excellence in Procurement award for the seventh consecutive year. She served as President of the National Association of Educational Procurement Pacific Region in 2014/2015 and has over 16 years of supply chain experience. Nichol's past positions include: Vice President of Operations for Boon Inc. and Keen Distribution; Senior Supply Chain Consultant at Clarkston Consulting; and multiple supply chain roles at Intel Corporation.

Nichol holds the Project Management Professional (PMP) credential; earned her Master's in Business Administration from Duke University, graduating Summa Cum Laude, where she was honored as a Fuqua Scholar; and, is an alumni of ASU where she graduated Summa Cum Laude with a Bachelor's degree in Supply Chain Management and was selected as the WP Carey Outstanding Graduating Senior.



Kathleen Prunty is the Director of Procurement & Support Services for California State Polytechnic University Pomona. She joined the campus in 2007 after working in logistics and material handling for Interlake Material Handling, Inc. and Crown Lift Trucks, Inc. In recent years she has served as president of the Procurement & Support Services Officers Association and currently serves WACUBO on the Professional Workshops Development Committee. The university was selected in 2015 to present on 'Continued Pursuit of Excellence' at the National Purchasing Institute annual conference in concert with receiving the 9th Achievement in Excellence in Procurement Award.

Kathleen completed her Bachelor's in Organizational Development. She volunteers as an associate advisor for a Boy Scouts of America Venture Crew enjoying backpacking, rock climbing, snow shoeing and other high adventure outings.

Course Description

This workshop is designed to help business managers understand the negotiation process while learning strategies for analysis, develop decision making processes, and define methods for negotiations.

Date/Time

Monday, September 19, 2016 8:30am-4:30pm
Tuesday, September 20, 2016 8:30am-Noon
(Included: continental breakfast both days and lunch on Mon. Lunch provided Tues. for those attending both workshops)

Learning Objectives

- Learn business interactions that involve negotiation and understand the many negotiation styles and strategies available to you to improve business relationships and outcomes
- Develop and practice techniques and skills to enhance your understanding of potential negotiated outcomes including ability to chart decision points, alternate solutions, and exit strategies
- Refine your understanding of positions, strength/weakness, and win/win tactics to improve outcomes in a shared governance model like higher education
- Understand elements of agreement, contract, and implementation
- Build a network of colleagues who have similar roles and responsibilities and who face many of the same challenges and opportunities

Key Takeaways

- Improved approach to professional and personal interactions that involve negotiation and give and take
- Toolkit for common interactions that involve everyday negotiation—personnel issues, budget/resource requests
- Understanding of common pitfalls in negotiations and how to mitigate those pitfalls

Who Should Attend

This workshop is designed for higher education professionals responsible for business administration in a college, division, department or other units including central administration. Individuals who regularly negotiate both internally for resources across campus and externally with third parties will gain perspective and strategies that will support needs of higher education officers.

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Unit & Academic Business Officer (September 20-21, 2016)

Instructors



Rondi Stein is the Assistant Dean of Finance and Administration for the School of Leadership and Education Sciences at the University of San Diego. Serving as an integral member of the School's leadership team, Ms. Stein provides administrative leadership and oversight for SOLES's non-academic administration including budget and finance, and human resource, event and facilities management to enhance services and quality support of student learning and faculty achievement. In her role, she participates in long-term planning, policy setting and implementing organizational strategies and policies. She works collaboratively with and is the SOLES liaison to key administrators in campus departments including: Human Resources, Controller's Office, Budget and Treasury, Student Financial Services, Purchasing, Provost's Office, and Facilities Management offices.

Ms. Stein received her Master's in Business Administration with an emphasis in international business and marketing from the University of San Diego.



Jeffrey Ratje is the Associate Dean, Finance and Administration, and Treasurer, Arizona Experiment Station at the University of Arizona's College of Agriculture and Life Sciences (CALs). In these roles, he is the chief finance and strategy officer for a land grant organization with 1,500 employees, the steward of 140,000 acres of land, and oversees all business activities for an operation located in every county in Arizona. Prior to CALs, he held professional business positions in the UA's Rogers College of Law, Budget Office, and Sponsored Projects Services.

He's excited to co-present this course to expand the partnership between academic and business leaders, and enhance the collaboration between units and central administration.

Jeffrey is a gubernatorial appointee to the State's 529 college savings plan committee, and holds an MPA in Public Finance and a BS in Business Administration from the Eller College at the UA.

Course Description

The world of the academic and unit business officer is changing—are you prepared? Attend this interactive workshop to build your foundation for success. Discover new ways to support and advance your organization. This workshop is geared toward early and mid-career professionals.

Date/Time

Tuesday, September 20, 2016 1:00pm-4:30pm
Wednesday, September 21, 2016 8:30am-4:30pm
(Included: continental breakfast both days and lunch on Wed.
Lunch provided Tues. for those attending both workshops)

Learning Objectives

- Develop an action plan for adding value to your organization
- Raise your awareness about challenges and ethical issues faced by academic and unit business officers
- Develop your role as a strategic partner to lead change
- Practice techniques for interacting and communicating effectively with faculty, administrators, students and your peers
- Explore ways to improve processes in complex environments
- Build a network of colleagues who have similar roles and responsibilities and who face many of the same challenges and opportunities

Key Takeaways

- Strategies and an action plan for advancing your knowledge, expanding your skill set and adding value to your organization
- Approaches for collaborating with central administration on common issues
- Road map for success beyond compliance and transactions
- Financial presentation techniques

Who Should Attend

This workshop is designed for higher education professionals responsible for business administration in a college, school, division, department and other units. Individuals from central administration who are interested in better understanding unit operations are encouraged to attend as well.

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Marriott Downtown at City Creek

75 South West Temple
Salt Lake City, UT 84101

Marriott Downtown at City Creek is located in the heart of the dining, entertainment, historic and shopping districts of Salt Lake City. Only 15 minutes from Salt Lake International Airport.

Hotel guest parking rates are \$15 per day for self-parking and \$20 for valet parking.



Things to do in Salt Lake City

Red Butte Garden & Arboretum
Abravanel Hall, home of Utah Symphony
Biking, hiking, and more outdoor activities

Natural History Museum of Utah
Temple Square, including Mormon Tabernacle Choir
Shopping and dining at the adjacent City Creek Center



**NATURAL HISTORY
MUSEUM OF UTAH**
Rio Tinto Center,
The University of Utah



CPE Information

Attendees of **Negotiation** workshop will be eligible to earn approximately 11.5 CPE units in Management Advisory Services.

Attendees of **Unit and Academic Business Officers** workshop will be eligible to earn approximately 11.5 CPE units in Business Management and Organization.

CPE hours are subject to adjustment due to minor schedule modifications.



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.