

WACUBO Workshop Series: Seven Workshops to Choose From!

Anaheim, California – November 4-6, 2019

Join us this November in Anaheim for an opportunity to expand your knowledge and network with peers from all over the West coast. This workshop series will take place over three days, and attendees will have the option to choose how many days and courses to register for. Please see the available courses below, and the corresponding schedule afterwards.

Build your own schedule with 1-Day, 2-Day, and 3-Day options!

- New to Higher Education
- University and Academic Business Officers
- Lean Process Improvement
- Shared Services
- Higher Education Accounting & Reporting
- Strategy in Higher Education
- Three C's of Higher Education Budgeting: Concepts, Creation, and Connections

New to Higher Education (A)

November 4

Glen Nelson & Mark Heil 7.5 CPE units in Personal Development

Course Description

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.

Learning Objectives

- 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

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.

Strategy for Higher Education (B)

November 4

Jeffrey Aird

Approximately 7.5 CPE units in Management Advisory Services

Course Description

Strategy in higher education looks different than in any other sector, yet it's just as essential. In this workshop we will learn together the essential elements of a higher education strategy and the processes to create one that can energize your team and advance your goals. We will evaluate case studies from different higher education sectors to glean lessons for workshop participants.

Learning Objectives

- Critique and evaluate the different elements of strategy in higher education
- Create the basic components of a higher education strategy for your needs
- Design a scalable participatory strategy development process that people want to engage in
- Design strategy assessments
- Engage in interesting family dinner conversations regarding higher education strategy

Who Should Attend

Anyone interested in improving organizational focus, engagement, and outcomes. We will provide insights for both the mid-level leader who is trying to align her work as well as to the executive trying to design a more comprehensive strategy for an entire college or university

Three C's of Higher Education Budgeting: Concepts, Creation, and Connections (C) November 5

Linda Kosten & Sarah Magnum 7.5 CPE units in Budgeting

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.

Learning Objectives

- Explore the concepts and components of a higher education budget process
- Create a budget for a sample program or department
- Review tools/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

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.

University & Academic Business Officers (E) November 6

Rondi Stein & Jeffrey Ratje Approximately 7.5 CPE units in Management Advisory Services

Course Description

The world of higher education is changing – are you prepared? The evolution of the business officer as a strategic partner is stressing fundamentals and infusing new thinking and techniques. Attend this interactive and applied workshop to build your foundation for success and add value to your organization. This workshop is geared toward early and mid-career professionals.

Learning Objectives

- Develop an action plan for adding value to your organization
- Raise your awareness about challenges and ethical issues
- Develop your role as a strategic partner to lead change
- Practice techniques for interacting and communicating effectively with faculty, administrators, students and 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

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 understanding unit operations and the faculty mindset are encouraged to attend as well.

Lean Process Improvement (D) November 6

Robyn Pennington & Alexis Naiknimbalkar

Approximately 7.5 CPE units in Personal Development

Course Description

Many organizations follow dated policies and procedures because of the tradition of "That's how it's always been done." 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. In most cases, only a small percent of all activities supporting business processes add value for customers and end-users.

Learning Objectives

- Manage/communicate a process improvement effort
- Create "current state" and "future state" process maps
- Identify and reduce non-value added steps (Waste) Apply Lean tools/methodologies (Value-stream map with Metrics, Waste Walk, A3 Thinking)
- Create an Action Plan to track and drive improvement efforts

Who Should Attend

Individuals interested in learning Lean concepts and process mapping with desire to improve performance. This session is highly interactive and the concepts are presented using games, exercises, and demonstrations. Participants will leave prepared to map/analyze their own process. No prerequisites required.

Shared Services (F) November 4-5

Megan Villasenor & Jon Marchetta

Approximately 15 CPE units in Management Advisory Services

Course Description

Colleges and universities across the country are facing the daunting task of transitioning to a shared services model. The University of California, Davis will share best practices developed over the past several years that address the challenge of designing, implementing, and sustaining a shared services center.

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 design, build, and implement shared services
- Understand role of stakeholders in implementing shared services
- Explore concepts related to success factors for managing shared services

Who Should Attend

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.

Course Description

Get beyond the basics of accounting and reporting and expand your knowledge and effectiveness as a leader in higher education finance. This workshop offers a solid review of the theoretical framework of higher education accounting and reporting. Additional information on analyzing and interpreting financial statements will be provided, along with excellent networking opportunities with fellow colleagues throughout the WACUBO region.

Learning Objectives

- 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 standard that govern endowments, gifts, and restrictions
- Learn the difference between financing capital and operating activities
- Identify the basic financial statements and information included in financial reports

Who Should Attend

This course is intended for those who already have a basic knowledge 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 AICPA.

Suggested Prerequisite: NACUBO's Essentials of College and University Accounting (ECUA) – online self-study course.

1-Day Workshop Options | Early-bird \$375 / After Oct 1: \$425**

- A – New to Higher Education (Mon)**
- B – Strategy in Higher Education (Mon)**
- C – Three C's of Higher Education Budgeting: Concepts, Creation, and Connections (Tues)**
- D – Lean Process Improvement (Wed)**
- E – Unit & Academic Business Officers (Wed)**

2-Day Workshop Options | Early-bird \$525 / After Oct 1: \$575**

- F – Shared Services (Mon/Tues)**
- G – Higher Education Accounting and Reporting (Tues/Wed)**
- AC – New to Higher Education (Mon)/ Three C's of Higher Education Budgeting (Tues)**
- AD – New to Higher Education (Mon)/ Lean Process Improvement (Wed)**
- AE – New to Higher Education (Mon) / University & Academic Business Officers (Wed)**
- BC – Strategy in Higher Education (Mon) / Three C's of Higher Education Budgeting (Tues)**
- BD – Strategy in Higher Education (Mon) / Lean Process Improvement (Wed)**
- BE – Strategy in Higher Education (Mon) / University & Academic Business Officers (Wed)**
- CD – Three C's of Higher Education Budgeting (Tues) / Lean Process Improvement (Wed)**
- CE – Three C's of Higher Education Budgeting (Tues)/ University & Academic Business Officers (Wed)**

3-Day Workshop Options | Early-bird \$675 / After Oct 1: \$725**

- AG – New to Higher Education (Mon)/ Higher Education Accounting and Reporting (Tues/Wed)**
- BG – Strategy in Higher Education (Mon) / Higher Education Accounting and Reporting (Tues/Wed)**
- FD – Shared Services (Mon/Tues)/Lean Process Improvement (Wed)**
- FE – Shared Services (Mon/Tues)/University & Academic Business Officers (Wed)**
- ACD – New to Higher Education (Mon)/ Three C's of Higher Education Budgeting (Tues)/Lean Process Improvement (Wed)**
- ACE – New to Higher Education (Mon)/ Three C's of Higher Education Budgeting (Tues)/University & Academic Business Officers (Wed)**
- BCD – Strategy in Higher Education (Mon)/ Three C's of Higher Education Budgeting (Tues)/Lean Process Improvement (Wed)**
- BCE – Strategy in Higher Education (Mon)/ Three C's of Higher Education Budgeting (Tues) University & Academic Business Officers (Wed)**

** Early-bird is prior to October 1, 2019. Rates listed are for WACUBO Institution members | Non-members pay an additional \$100 in registration**

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



Book Your Room

WORKSHOPS FILL QUICKLY, please reserve Workshop before booking room and/or travel.

Room Rates

\$139 per night.* Room rate is valid through Sunday, October 13, 2019 - or until room block is filled.

To reserve room: **714-750-1234** and mention **WACUBO** or book room online at [WACUBO Anaheim Series Workshop](#)

*Based on single occupancy plus applicable taxes 14.5% Occupancy Tax; 2.5% GGTID Assessment Fee and a \$0.92 CA Tourism Tax will be charged in addition to the room rates set forth above.

Parking at the Hotel

\$28 daily – Discounted to \$22 per day self-park

Transportation from the Airport

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

Contact information (Workshop Leads)

Jeanette Perez: perezjr@asu.edu | Betsy Clark: betsy.clark@usu.edu

Cancellation information

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.



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