



Business Management Institute

Track 2 Intro to Case Study Format & Leadership Lessons

10:30am – 12:00pm

August 4, 2026

Loma Palona 1108



Business Management Institute – Track 2

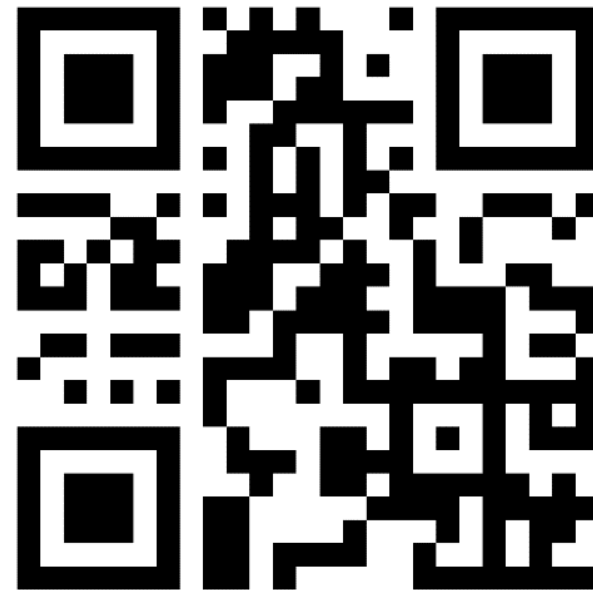
Welcome - Track 2

CHECK-IN POINT

- Point your phone's camera at the QR code
- or*
- Navigate to <https://wacubo.cnf.io>
- Tap session matching this room
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WACUBO 2026

Business Management Institute





Facilitator Introductions

About Us!!!

Dr. Yolanda Anglin (Track 2 Lead), CSU Monterey Bay (Retired), AVP Finance & Director of Budget & Planning

Amber Blakeslee, UC Santa Cruz, Associate Vice Chancellor for Budget Analysis and Planning

Melissa (Missy) Jarnigan, CSU Monterey Bay, VP of Administration & Finance/CFO

Dr. Queen King, Bakersfield College, VP of Finance & Administrative Services



Participant Introductions



About You!!!



Group Dynamics

The **psychological forces** and **interaction patterns** that occur within and between social groups.



Stages of Group Development (5 stages)

Bruce Tuckman's model outlines five primary phases a group experiences:

- 1) Forming**
- 2) Storming**
- 3) Norming**
- 4) Performing**
- 5) Adjourning**



Core Elements (4)

- 1) Roles
- 2) Norms
- 3) Cohesion
- 4) Communication



Impact on Performance

- 1) **Positive Dynamics**
- 2) **Negative Dynamics**



Track 2 – What to Expect

Case Studies

- Importance of team dynamics
- Benefits
- Possible topics
- Help you think broadly



Track 2 – Role of Facilitators

Case Studies

- Guide
- Suggest
- Timekeeper
- Things to remember



Breakout Session

Sample Cases



Key Takeaways from Yesterday's Presentation

- 1) Clarity is kindness**
- 2) Lead with facts**
- 3) Stay curious**
- 4) Address issues early**
- 5) Follow through**



Breakout Groups (15 minutes)

- 1) Federal Funding in Jeopardy**
- 2) Yvonne & Alexander**
- 3) Budget Challenges, Solutions & Unintended Consequences**



Case Study

Sign-ups



Looking to Obtain CPEs?

**Don't forget to
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the system!**

