

### WACUBO Pacific Rim Workshop Series – *Nine Workshops to Choose From!*

Honolulu Hawaii, March 17-19, 2020

Join us in Honolulu Hawaii for an opportunity to expand your knowledge and network with peers from all over the West coast and Pacific Islands. This workshop series will take place over three days at **Kapi'olani Community College**, with meals being provided by their award winning culinary program. Attendees will have the option to choose up to three courses to register for. Please see the available courses below, and the corresponding schedule afterwards. We are excited to host these wonderful workshops and for everyone to experience the beautiful campus.

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

- Higher Education Accounting for Non-Accountants
- From Supervisor to Leader
- Strategy for Higher Education
- Coach Approach to Performance Management
- Grants Management
- Inclusive University Ethics
- Design Thinking
- Facilities & Administration (Long-form)
- Facilities & Administration (Short-form)

#### Higher Education Accounting for Non-Accountants

*Cheryl L. Wiescamp & Lupe Valencia*

March 17 or 18

7.5 CPE units in Accounting

##### Course Description

This class will help you expand your knowledge and effectiveness as a leader in higher education by understanding the basic principles of financial and fund accounting. Understanding the basics of accounting in higher education will allow you to better converse with your accounting and budget staff and will show you how accounting can help with making management decisions. We will also present several recent cases of fraud that have occurred in higher education, including what you can do to watch out for the newest scams.

##### Learning Objectives

- Demonstrate how to read financial statements
- Explain fund accounting
- Differentiate between cash basis accounting and accrual accounting
- Describe straight line depreciation
- Discuss internal controls and the fraud triangle

##### Who Should Attend

Higher Education professionals who are not accountants and who do not have a background in accounting. Basic information on accounting principles, terminology and financial statements will be presented, along with an overview of accruals and deferrals, and depreciation, as well as fraud and internal controls.

#### From Supervisor to Leader: Taking your leadership skills to the next level for your institution

March 17

*Sara Reed*

7.5 CPE units in Management Advisory Services

##### Course Description

Within higher education, we need to be both resource managers with a sense of stewardship, and leaders helping move our teams forward through engaged leadership. This workshop will cover theory and practical application, through the use of case studies and reflection, to explore how a leader within higher education can both manage resources smartly and lead people with intent and vision.

##### Learning Objectives

- Identify supervisor, manager, and leader behaviors and how to do so intentionally
- Express individual leadership values and behaviors
- Discuss how to practically apply concepts to case studies
- Complete a leader development plan to continue individual leadership learning beyond the workshop

##### Who Should Attend

Anyone interested in learning more about balancing the need to be both leader and manager within higher education. The workshop is structured to be flexible and utilize the expertise and experience within the workshop. The workshop is appropriate for both current and aspiring leaders.

## Strategy for Higher Education

*Jeff Aird*

March 17

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 different case studies from different higher education sectors to glean lessons for workshop participants. By the end of the day you will have a tool box of approaches for creating meaningful strategies that can accomplish institutional goals.

### 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

### 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.

---

## The Coach Approach to Performance Management

*Carina Celesia Moore*

March 18

Approximately 7.5 CPE units in Management Advisory Services

### Course Description

A manager's role in the most innovative, engaging, and productive organizations, is that of "coach" – someone who enables a culture where performance management is an on-going professional development practice throughout the year, rather than just an annual appraisal event. This workshop focuses on the "coach approach" to performance management, and will build skills that lead to conversations employees welcome, and that inspire their best work. Participants will explore the core coaching competencies and how to set the foundation for powerful coaching conversations built on trust and effective communication.

### Learning Objectives

- Compare the role of "coach" to other roles (e.g., mentor, advisor)
- Review core coaching competencies (based on International Coach Federation - ICF)
- Discuss what it takes to create a trusted relationship
- Explore and apply communication skills that inspire others

### Who Should Attend

Higher education professionals who want to increase their HR knowledge and skills for enabling a performance management culture. Program leads, supervisors and managers will especially benefit from this workshop as they increase their "coach approach" effectiveness in their performance management efforts.

---

## Grants Management

*Andres Chan, Ken Erickson, Lupe Valencia*

March 18

Approximately 7.5 CPE units in Accounting

### Course Description

This workshop is designed to provide business officers a solid grants management and administration foundation. Understanding key concepts, overarching policy, related methodologies and identifying value-added activities are key to successfully managing sponsored research.

### Learning Objectives

- Know the governing regulations and compliance requirements for Sponsored Research at your institution.
- Capability to manage the "Grants and Contracts Life Cycle" for Sponsored Research.
- Identify applicable Data Analytics that should / could be employed at your institution.
- Understand elements of sponsored agreements and arching applicable guidance.
- Learn value added activities to improve Internal Controls that assist the compliance process.

### Who Should Attend

Higher education professionals responsible for grants management in a college, division, department (or other units), including central administration. Specifically, individuals who are regularly tasked with data analysis and compliance efforts in the daily management of sponsored funds.

## Inclusive University Ethics

*Jessica Ludescher Imanaka*

### Course Description

This interactive workshop will provide a foundation for identifying and addressing ethical challenges in the university context. We will examine university ethics cases, including those experienced by participants in their respective workplaces. Participants will practice working through problems in activities and devising customized techniques for enhancing their ethics competencies in practical application. An appreciation for the diverse traditions that inform ethical outlooks will be emphasized so as to heighten mutual respect when conflicts arise. We will combine creative problem solving with reflection in practice sessions aimed at finding novel and effective ways of approaching moral quandaries at work.

### Learning Objectives

- Identify principles and values to guide ethical decision making
- Describe diverse ethical traditions that inform decisions
- Practice addressing moral conflicts in the workplace
- Demonstrate awareness of common pitfalls to avoid

### Who Should Attend

Since ethics spans divisional boundaries and applies broadly, all members of WACUBO are invited to attend. Participants will benefit from listening to and engaging with diverse voices and views.

## Design Thinking: Developing Your Toolkit for Customer-Focused Solutions

*Carina Celesia Moore*

### Course Description

Join us to explore the fundamental phases in the Design Thinking process (e.g., What Is? What If? What Wows? and What Works?), as well as rediscover tools through the lens of Design Thinking. In this interactive workshop, you will participate in several exercises designed to build skills in human-centered design, practice applying the concepts, and develop your own toolkit for future use. Participants will discover how to make Design Thinking a habit that drives organizational performance and continuous improvement. You will leave with renewed creativity to engage your customers!

### Learning Objectives

- Compare Design Thinking to traditional problem-solving methods
- Employ a variety of Design Thinking tools aimed at unlocking creativity and innovation
- Practice using Design Thinking activities that can be applied at any higher education institution
- Develop a Design Thinking toolkit that leads to customer-focused solutions

### Who Should Attend

Managers and individual contributors interested in learning how to apply design thinking tools and customer-focused, innovative solutions in their organizations.

## Facilities & Administration - Long Form

*Andres Chan, Ken Erickson, Lupe Valencia*

### Course Description

This workshop is designed to help business officers understand the basic concepts for building a long form F&A proposal at a high level. Learn the concepts, methodologies and applicable guidance to provide you with a general background of the costing world. In addition, we will provide you with an overview of the negotiation process and key issues that may impact your institution's rates.

### Learning Objectives

- Refine your understanding of the facilities and administrative ("F & A") cost proposal process and the related negotiations with cognizant agencies for long form schools.
- Understand when F & A Rate Proposals must be prepared and then reviewed by cognizant agencies.
- Discuss the negotiation process and recent key costing negotiation issues that may be relevant to your institution.
- The principles and terminology of the facilities & administrative rates according to the Federal Uniform Guidance.

### Who Should Attend

Higher education professionals who's institution requires the Long Form methodology for F&A rate preparation. Also those responsible for grants management, and specifically individuals who are regularly tasked with cost/management accounting and indirect cost recovery fund management.

# Facilities & Administration - Short Form

March 19

Andres Chan, Lupe Valencia

Approximately 3.5 CPE units in Accounting

## Course Description

Are you an F&A short form school? This workshop is the one for you. Learn the details behind creating an F&A proposal using the simplified methodology. Understand the various costing principles and adjustments that are necessary for your proposal submission. We can walk you through the concepts to get you ready for your upcoming submission.

## Learning Objectives

- Understand the F & A cost proposal process and the related negotiations with cognizant agencies for short form schools.
- Learn how the F & A Research Rates are calculated and negotiated with the federal government.
- Understand when F & A Rate Proposals must be prepared and then reviewed by cognizant agencies.
- Discuss the negotiation process and recent key costing negotiation issues that may be relevant to your institution.

## Who Should Attend

Higher education professionals working in an educational institution which requires the short form methodology for F&A rate preparation. Also for those responsible for grants management in a college, division, department (or other units), including central administration. Individuals who are regularly tasked with cost/management accounting, indirect cost recovery fund management and those who want to learn the principles and terminology of the facilities & administrative rates according to the Federal Uniform Guidance

## SCHEDULE AT A GLANCE

Each course takes place throughout the entire day (8am-5pm) with the exception of Facilities & Administration, which are both half-day courses (Long Form will be taught in the morning, and Short Form in the afternoon).

Attendees can build their ideal schedule based on their allotted time.

### Tuesday, March 17

- Higher Education Accounting for Non-Accountants
- From Supervisor to Leader: Taking your leadership skills to the next level
- Strategy for Higher Education

### Wednesday, March 18

- Higher Education Accounting for Non-Accountants
- Coach Approach to Performance Management
- Grants Management

### Thursday, March 19

- Inclusive University Ethics
- Design Thinking
- Facilities & Administration - Long Form
- Facilities & Administration - Short Form  
\* may be combined with Long Form

**1-Day Workshop | Early-bird \$375 / After January 28: \$425\*\***

**2-Day Workshop | Early-bird \$525 / After January 28: \$575 \*\***

**3-Day Workshop | Early-bird \$675 / After January 28: \$725\*\***

\*\* Early-bird is prior to January 28, 2020. 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*

## WACUBO Scholarships are Available!

WACUBO offers professional development scholarships to employees of WACUBO member institutions. These scholarships will go toward all or a portion of the registration fees of an annual conference, professional development workshop, or other WACUBO sponsored professional development programs.

Scholarships DO NOT cover other expenses (e.g. travel, incidentals, etc.)

[Apply Here](#)



### Book Your Room

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

[Booking Link](#) | **Booking Code: WACTWO**

### Room Rates

Starting at \$187/night, and available 3 days before/3 days after the workshop.

### Parking at the Hotel

All parking is \$20/day with in/out privileges

### Transportation from the Airport

Speedi Shuttle, VIP Transportation, Roberts Hawaii

### Transportation from the Hotel to Kapi'olani Community College will be provided by WACUBO

### Contact information (Workshop Leads)

Betsy Clark: [betsy.clark@usu.edu](mailto:betsy.clark@usu.edu) | Brian Furuto: [bfuruto@hawaii.edu](mailto:bfuruto@hawaii.edu) | David Tamanaha: [davidt@hawaii.edu](mailto:davidt@hawaii.edu) |  
Jake O'Connor: [jake.oconnor@utah.edu](mailto:jake.oconnor@utah.edu) | Mike Unebasami: [mune@hawaii.edu](mailto:mune@hawaii.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.



The Western Association of College and University Business Officers (WACUBO) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).