FALL 2017 WORKSHOP
Lean Process Improvement *with* Fundamentals of Project and Change Management

November 7-9, 2017 | 8 a.m. – 5 p.m.

Hyatt Palm Springs, Palm Springs, California

Participants will learn practical tools to implement process   improvement projects at their institution. Day 1 is spent learning the tools of process improvement. Day 2 provides a carry-through from Lean Process Improvement to implementation via Project and Change Management. Day 3 is concentrated on building your project and change management skills.

Lean Process Improvement

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 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
- Understand the value of creating a lean culture to achieve organization excellence
- Apply Lean Six Sigma principles and tools to remove waste and improve processes
- Identify client value and collect critical to quality requirements
- Map current state end to end processes to visualize the value stream
- Utilize data to evaluate the speed, quality, and cost of services

Who Should Attend

Individuals interested in learning lean concepts and process mapping with a 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 processes.

Instructor

Tomika Coates is the Director of Shared Services at University of California, Riverside (UCR). She is responsible for creating a roadmap for change, which serves as a model for an optimized lean shared services environment. During her 25 year career in Human Resources and Payroll, she has lead individuals and teams through transformative change, to achieve organizational excellence, in both public and private sector environments. Prior to joining UCR, Tomika worked as a Learning and Organizational Development Manager and Certified Compensation Consultant. In these roles, she facilitated the development of a sales and service culture, implemented market competitive total cash compensation programs, and designed lean processes and systems. She is a Lean Six Sigma trainer at UCR and serves as a Board member for the Network for Change and Continuous Innovation (NCCI).

Fundamentals of Project and Change Management

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.

Attendees who have completed the Lean Process Improvement Workshop have an Action Plan to track and drive a "real live" improvement effort at their university. So what are the next steps? The Project and Change Management Workshop is designed to walk attendees through step by step processes and best practices to successfully define, plan and implement their process improvement projects. This program will explore the Project Management Institute's (PMI) PMBOK best practices and the Prosci ADKAR Model and demonstrate how your university can build a structured and effective project and change management capability.

Learning Objectives:

- Understand the project management life cycle and core processes including project initiation, planning, execution, control and closing
- Understand the change process. Understand the Prosci ADKAR Model of change management and how it can benefit your institution.
- Take away a project management toolkit that includes templates, tools, and checklists.
- Take away a 3-phase Change Management Process to use for organizational change and change projects.
- Take away a model to help individuals transition from a current state to a future state.
- Understand change management critical roles including sponsor, manager/supervisor, change manager and project manager.
- Understand how change management integrates with project management

Key Takeaways:

- 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
- Introduction to a model for individual and organizational change

Who Should Attend?:

- This workshop is proposed as a next step for those who attended the Lean Process Improvement Workshop but it is open to 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 or a real life project from their university.

Instructors

Bridget Wikidal, PMP
Director Project and Change Management Office,
California State University
Bridget has over 25 years of experience in information technology and project management in both public and private sector. She is a certified Project Management Professional (PMP), a Prosci certified Change Management Practitioner and Trainer and is a fellow of the Council on Library and Information Resources (CLIR)/Educause 2015 Leading Change Institute. She is a co-founder of the Network for Change and Continuous Innovation (NCCI) Change Management Community of Practice and a national leader and advocate for change management in higher education. Bridget has been with the California State University Chancellor's Office for 11 years where she has built a Project and Change Management Office that provides specialized support, consulting services and training to the University system in the areas of project management, change management, business analysis, facilitation, documentation and content management.

Scott McAllister
Vice President of Growth, Prosci
Scott McAllister is a results-driven leader with a passion for change management. Scott leads Prosci's growth efforts by partnering with clients to architect outcome-oriented change management solutions based on his 15 years of Lean consulting expertise, helping clients initiate transformational change through a combination of strategy, operational excellence and innovation platforms. He has worked across a broad range of industries, ranging from healthcare, higher education and biotech, to financial services and telecom, and has to date delivered services for more than 80 clients in over 28 countries.

WACUBO Workshop Registration

Register online at: www.wacubo.org/workshops

Hyatt Palm Springs
285 North Palm Canyon Drive
Palm Springs, CA 92262

Workshop	Member	Non-Member
Three-Day Workshop November 6-8, 2017	$600	$650

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

Plus, Enjoy Palm Springs Amenities After Class!

- Downtown Palm Springs
- Palm Springs Aerial Tramway
- Palm Springs Desert Art Museum

https://palmsprings.hyatt.com/en/hotel/activities/area-activities/localattractions.html

Workshop Contacts:

Kathleen Prunty: kaprunty@cpp.edu
Cesar Portillo: cportillo@csusb.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:

CPE Information

Attendees of **Data Visualization and Predictive Analytics** will be eligible to earn approximately 24 CPE units in Management Services. 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 (QAS) 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.
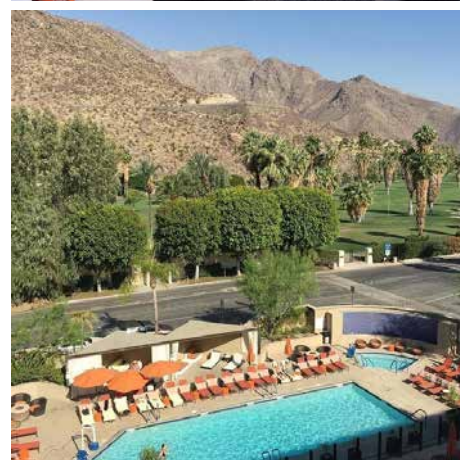
Book Your Room

- **WORKSHOPS FILL QUICKLY, please reserve Workshop before booking room and/or travel**
- **Room rate for WACUBO guests: $119 per night***
- **To reserve room: 1-888-591-1234 (reservations) and mention 06WA or book room online at:**
  https://aws.passkey.com/go/06WA

* Based on single occupancy. Rooms are available at this rate 3 days before and 3 days after the conference.

Transportation from Airport

- **Complimentary shuttle to and from Palm Springs airport.**