



FALL 2018 WORKSHOP

Three C's of Higher Education Budgeting: Concepts, Creation and Connections with Negotiation

August 15-17, 2018 | 8 a.m. – 5 p.m.

The Porter, Curio Collection by Hilton, Portland, Oregon

Negotiation

Days 1 & 2

Negotiations happen every day. Whether you are negotiating with your boss and budget officer to get another FTE or training budget, negotiating with facilities to get more space, or negotiating with your spouse on where you are going to dinner, having enhanced and purposeful negotiations strategy and skills are helpful and even required in achieving your desired outcome.

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.

Learning Objectives

By the end of this workshop participants will:

- 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

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

Instructors

Nichol Luoma is the Associate Vice President of University Business Services, Sustainability Operations Officer, Chief Procurement Officer for Arizona State University and President of the National Association of Educational Procurement. In 2016 under her leadership, ASU earned the National Procurement Institute's Achievement of Excellence in Procurement award for the eighth consecutive year. She serves as Executive Vice President of the National Association of Educational Procurement and has over 17 years of supply chain experience. 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 has served the California State University at two campuses. Her most recent appointment is the Director of Acquisition Management at San Jose State University. Previously, under her leadership at Cal Poly Pomona, her team was recognized by the California Higher Education Collaboration with the Collaborative Innovation Award for an e-marketplace platform utilized by 15 campuses. The campus also earned the National Procurement Institute's Achievement of Excellence in Procurement each year during her service. She currently serves WACUBO on the Professional Workshop Development Committee and Marketing Committee and previously served as president of the Procurement & Support Services Officers Association. Prior to higher education she worked in the material handling and logistics industry.

FALL 2018 WORKSHOP

Three C's of Higher Education Budgeting: Concepts, Creation and Connections

Days 2 & 3

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:

By the end of this workshop participants will:

- Understand the project management life cycle and core processes including project initiation, planning, execution, control and closing
- Explore the concepts and components of a higher education budget process
- Create a budget for a sample program or department
- Review tools and 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.

Key Takeaways:

- Recognize connections between the budgeting process and institutional mission and goals
- Learn about real world, complex examples from financial experts in higher education

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.

Instructors

Lisa Frace has over 25 years of experience in finance, treasury, strategic planning and budget management. She is currently the Associate Vice President for Budget and Planning and Chief Budgeting Officer for Arizona State University. Prior to joining ASU, Lisa spent 12 years with Amtrak. Lisa holds an MBA with concentrations in finance and marketing from the Smeal College of Business at Pennsylvania State University, as well as a BS in Health Planning and Administration from Penn State.

Linda Kosten, PhD is the Senior Associate Provost of Academic Administration at the University of Denver. Linda has served DU for 24 years, in housing and residential education; arts, humanities, & social sciences; and since 2006 at the University level. She has a PhD and MA in higher education from DU. Linda's book, *Decentralized Budgeting and the Academic Dean: Perspectives on the Effectiveness of Responsibility Center Management* (2009), explores the effectiveness of RCM from the perspectives of 146 deans at 27 universities. Linda is adjunct faculty in the DU graduate program on higher education finance, institutional research, and enrollment management.

WACUBO Workshop Registration

Register online at: www.wacubo.org/workshops

The Porter Portland,
Curio Collection by Hilton
1355 SW 2nd Ave.
Portland, Oregon, 97201

Workshop	Member	Non-Member
Three-Day Workshop August 15-17, 2018	\$600	\$650

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

Plus, Enjoy Portland Amenities After Class!

- Downtown Portland
- Portland Streetcar & Portland Aerial Tram
- Portland Keller Auditorium

<http://curiocollection3.hilton.com/en/hotels/oregon/the-porter-portland-curio-collection-by-hilton-PDXCUQQ/attractions/index.html>

Workshop Contacts:

Jeanette Perez: perezjr@asu.edu

Diane Xiong: dxiong@pdx.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.

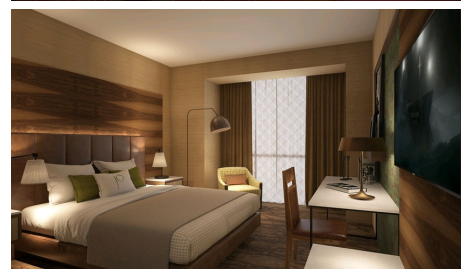
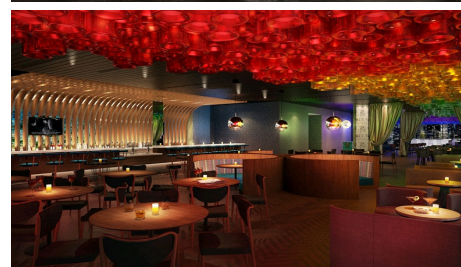
CPE Information

Attendees of **Negotiation** will be eligible to earn approximately 10.5 CPE units in Personal Development. Attendees of the **Higher Education Budgeting Basics** workshop will be eligible to earn approximately 11.0 CPE units in Business Management and Organizations. Note: 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 sub-



Book Your Room

- WORKSHOPS FILL QUICKLY, please sign up for Workshop before booking room and/or travel
- Room rate for WACUBO guests: \$182 per night*
- To reserve room: 1-844-748-0096 (reservations) and mention WACUBO or book room online at: <http://group.curiocollection.com/WACUBO>

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

Transportation from Airport+

- Trimet MAX ride—Red Line
- Blue Star Downtown Express Shuttle

Parking at the Hotel

- Valet event parking at \$20/day
- Overnight valet parking for overnight guests \$40/night, unlimited in-and-out