



**Developing Higher Education Business Professionals**

## **Pacific Rim Workshop Series**

**February 27 – March 1, 2018**

**8:30 a.m. – 4:30 p.m.**

**Waikiki Beach Marriott Resort &  
Spa**

## **Build Your Own Schedule: 1-Day, 2-Day, and 3-Day Options**

**Choose from the following seven  
Professional Development Workshops  
offered over three days!**

- **The “Coach Approach” to Performance Management (1 day)**
- **Change Management (1 day)**
- **Lean Process Improvement (1 day)**
- **The 3 C’s of Higher Education Budgeting (1 day)**
- **Shared Services (2 day)**
- **Higher Education Accounting and Reporting  
(2 day)**
- **Data Visualization & Predictive Analytics for Business Officers (3 day)**

# Pacific Rim Workshop Series Schedule

Tuesday 2/27/18	Wednesday 2/28/18	Thursday 3/1/18
<b>A</b> <b>Lean Process Improvement (Tu)</b> 8:30 am – 4:30 am Robyn Pennington and Alexis Naiknimbalkar		
<b>B</b> <b>The “Coach Approach” to Performance Management (Tu)</b> 8:30 am – 4:30 pm Carina Celesia Moore		
	<b>C</b> <b>Lean Process Improvement (Wed)</b> 8:30 am – 4:30 am Robyn Pennington and Alexis Naiknimbalkar	
		<b>D</b> <b>The 3 C’s of Higher Education Budgeting (Th)</b> 8:30 am – 4:30 pm Linda Kosten & Stephanie Metz
		<b>E</b> <b>Change Management (Th)</b> 8:30 am – 4:30 pm  <i>*Prerequisite Lean Process Improvement</i>
<b>F</b> <b>Shared Services (Tu/Wed)</b> 8:30 am – 4:30 pm Sara Reed		
	<b>G</b> <b>Higher Education Accounting and Reporting (Wed/Th)</b> 8:30 am – 4:30 pm Jeff West/Mary Fischer	
<b>H</b> <b>Data Visualization &amp; Predictive Analytics for Business Officers (Tu/Wed/Th)</b> 8:30 am – 4:30 pm Lauralea Edwards/Rebecca Barber/Mark Naufel		

<p><b>Higher Education Accounting and Reporting (2-Day)</b> Jeff West and Mary Fischer</p> <p><b>Course Description:</b> Get beyond the basics of accounting and reporting and expand your knowledge and effectiveness as a leader in higher education finance with this workshop from WACUBO. This workshop offers the attendee a solid review of the theoretical framework of higher education accounting and reporting. Operational, investing, and financing activities of the institution are reviewed – along with the impact of these activities on the financial statements. Additional information on analyzing and interpreting financial statements will be provided, along with excellent networking opportunities with fellow colleagues throughout the WACUBO region and beyond who will be in attendance.</p> <p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>Understand the purpose of fund accounting systems and its relevance in today's reporting formats</li> <li>Explain differences among operating and non-operating activities</li> <li>Analyze recognition issues pertaining to revenue and expenses</li> <li>Hear about relevant laws and account standards that govern endowments, gifts, and restrictions</li> <li>Learn the differences between financing capital activities and operating activities</li> <li>Identify the basic financial statements and information included in the financial reports</li> <li>Identify how to read and understand the basic financial statements</li> </ul> <p><b>Who Should Attend:</b> This course is intended for those who already have a basic understanding 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 the AICPA. Suggested Prerequisite: NACUBO's Essentials of College</p> <p><b>CPE Information:</b> Attendees of the workshop will earn 15 CPE units in accounting. Note: CPE's are subject to adjustment due to minor schedule modifications.</p>	<p><b>The "Coach Approach" to Performance Management (1-day)</b> Carina Celesia-Moore</p> <p><b>Course Description</b> 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. In this workshop, participants will explore the core coaching competencies and how to set the foundation for powerful coaching conversations built on trust and effective communication. There will be several interactive exercises in this workshop designed to build skills, practice applying the concepts, and create action plans. Participants will discover how to make coaching a habit that drives employee performance.</p> <p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>Compare the role of "coach" to those of mentor or advisor</li> <li>Review core coaching competencies</li> <li>Discuss what it takes to create a trusted relationship</li> <li>Practice foundational skills for powerful career and coaching conversations</li> <li>Discover how the coach approach to performance management engages employees and facilitates the performance results you</li> <li>Discover how to make coaching a habit that drives performance</li> </ul> <p><b>Who Should Attend:</b> This workshop is designed for higher ed professionals who want to increase their human resource 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.</p> <p><b>CPE Information:</b> Attendees of the workshop will earn 7.5 CPE units in Business Mgmt and Organization. Note: CPE's are subject to adjustment due to minor schedule modifications.</p>	<p><b>Lean Process Improvement (1-Day)</b> Robyn Pennington and Alexis Naiknimbalkar</p> <p><b>Course Description:</b> 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. 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.</p> <p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>Manage/communicate a process improvement effort</li> <li>Create "current state" and "future state" process maps</li> <li>Identify and reduce non- value added steps (Waste) Apply Lean tools/methodologies (Value-Stream Map, Waste Walk, A3 Thinking)</li> <li>Create an Action Plan to track and drive improvement efforts</li> </ul> <p><b>Key Takeaways:</b></p> <ul style="list-style-type: none"> <li>Templates and strategies that you can use right away</li> <li>Knowledge and tools for creating a process map</li> <li>Tools for reducing waste and increasing efficiency</li> <li>Ways to document potential improvements</li> <li>Strategies for mobilizing teams in your organization for process change</li> </ul> <p><b>Who Should Attend:</b> The workshop is designed for those new to lean concepts and process mapping. Participants should come prepared to map/analyze one of their processes. No prerequisites required.</p> <p><b>CPE Information:</b> Attendees of this workshop will be eligible to earn approximately 7.5 CPE units in Management Advisory Services. Note: CPE's are subject to adjustment due to minor schedule modifications.</p>
<p><b>3 C's of Higher Education Budgeting (1-day)</b> Linda Kosten &amp; Stephanie Metz</p> <p><b>Course Description:</b> 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.</p> <p><b>Learning Objectives</b></p> <ul style="list-style-type: none"> <li>Explore the concepts and components of a higher education budget process</li> <li>Create a budget for a sample program or department</li> <li>Review tools and techniques for on-going budget management</li> <li>Propose and evaluate budget options through workshop case studies</li> <li>Recognize connections between the budgeting process and institutional mission and goals.</li> </ul> <p><b>Who Should Attend:</b> 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.</p> <p><b>CPE Information:</b> Attendees will be eligible to earn approximately 7.5 CPE units in budgeting. Note: CPE's are subject to adjustment due to minor schedule modifications.</p>	<p><b>Shared Services (2-day)</b> Sara Reed</p> <p><b>Course Description:</b> 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. Through an interactive session, you will learn the key points about building a model that meets the needs of your campus, managing the migration from the old organization to the new, and embedding a culture of continuous change to reap the full benefits of your investment.</p> <p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>Develop knowledge of shared services, including what "is" and what "isn't" shared services</li> <li>Compare models of shared services and how they are different from centralization</li> <li>Describe steps to implement shared services</li> <li>Understand roles of stakeholders in implementing shared services</li> <li>Explore concepts related to success factors for managing shared services</li> </ul> <p><b>Who Should Attend:</b> 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.</p> <p><b>CPE Information:</b> Attendees of this workshop will be eligible to earn approximately 15 CPE units in Management Advisory Services. Note: CPE's are subject to adjustment due to minor schedule modifications.</p>	<p><b>Change Management (1-day)</b></p> <p><b>Course Description:</b> 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 change management methods and strategies reduces risk, cuts costs and significantly improves business outcomes. 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.</p> <p><b>PREREQUISITE:</b> Attendees must have already taken Lean Process Improvement</p> <p><b>Key Takeaways:</b></p> <ul style="list-style-type: none"> <li>Templates and strategies that you can use right away</li> <li>Knowledge and tools for initiating, planning, executing, controlling and closing a project</li> <li>Knowledge and tools for developing and executing a change management strategy and plan</li> <li>Intro to a model for individual and organizational change</li> </ul> <p><b>Who Should Attend:</b> This workshop is designed for those who attended the LPI Workshop. It is designed for 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 as a foundation.</p> <p><b>CPE Information:</b> Attendees of this workshop will be eligible to earn approximately 15 CPE units in Management Advisory Services. Note: CPE's are subject to adjustment due to minor schedule modifications.</p>
<p><b>Data Visualization and Predictive Analytics for Business Officers (3-day)</b> Lauralea Edwards/Rebecca Barber/Mark Naufel</p> <p><b>Course Description:</b> Colleges and universities are increasingly reliant on data to make decisions and solve problems. As a result, business officers need to know how to search for and utilize key metrics that identify and solve problems. This workshop shows you how to explore your data for insights and actionable metrics; and turn those metrics into actionable solutions using data visualization. We will cover principles of data exploration (i.e. data mining), data creation in Tableau, and principles for presenting data to top level administrators. You will have time and guidance to experiment with these techniques. Predictive analytics is a phrase that litters the news, but one too many business officers have little experience with. We often hear about predictive analytics and data mining technologies being applied to enrollment and retention problems, but it may not be immediately obvious how the business and finance parts of an institution can use these technologies. The session will cover the full life cycle of a project, from idea to implementation and assessment and then how to identify and select metrics; how to know your data; and how to build dashboards that tell compelling stories. No prior knowledge will be assumed, although a basic understanding of statistics is helpful. We will use RapidMiner Free, an industry-leading data mining tool that requires no programming skills. <b>You will need to bring a laptop for this hands-on workshop.</b></p> <p><b>Learning Objectives</b></p> <ul style="list-style-type: none"> <li>Gain familiarity with general principles of selecting metrics and visualizing data</li> <li>Understand principles for using data to brief senior leadership</li> <li>Understand the terminology and tools involved in predictive analytics, data mining, and other advanced analytic techniques</li> <li>Learn a repeatable process for advanced analytics that can be applied to a variety of business problems</li> <li>Practice assessing the results of an analysis to determine next steps</li> </ul> <p><b>Who Should Attend:</b> This workshop is intended for individuals at all levels of the organization who are responsible for complex analysis. Experienced professionals involved in strategic questions at either the college or institution level, in any department interested in learning how data visualizations can help their organization make decisions, advocate for change, and show results.</p> <p><b>CPE Information:</b> Attendees will be eligible to earn approximately <b>20 CPE units</b> in management Advisory Services. Note: CPE's are subject to adjustment due to minor schedule modifications.</p>		



# WACUBO Workshop Registration

Register online at: [www.wacubo.org/workshops](http://www.wacubo.org/workshops)

## 1-Day Workshop Options: (\$275 members / \$325 non-members)

- A: Lean Process Improvement (Tu)
- B: The “Coach Approach” to Performance Management (Tu)
- C: Lean Process Improvement (W)
- D: The 3 C’s of Higher Education Budgeting (Th)
- E: Change Management (prerequisite Lean Process Improvement) (Th)

## 2-Day Workshop Options (\$400 members / \$450 non-members)

- F: Shared Services (Tu/W)
- G: Higher Education Accounting and Reporting (W/Th)
- AD: Lean Process Improvement (Tu) / The 3 C’s of Higher Education Budgeting (Th)
- AE: Lean Process Improvement (Tu) / Change Management (Th)
- BC: The “Coach Approach” to Performance Management (Tu) / Lean Process Improvement (W)
- BD: The “Coach Approach” to Performance Management (Tu) / The 3 C’s of Higher Education Budgeting (Th)
- BE: The “Coach Approach” to Performance Management (Tu) / Change Management (Th)
- CD: Lean Process Improvement (W) / The 3 C’s of Higher Education Budgeting (Th)
- CE: Lean Process Improvement (W) / Change Management (Th)

## 3-Day Workshop Options (\$600 members / \$650 non-members)

- H: Data Visualization & Predictive Analytics for Business Officers (T/W/Th)
- AG: Lean Process Improvement (Tu) / Higher Education Accounting and Reporting (W/Th)
- BG: The “Coach Approach” to Performance Management (Tu) / Higher Education Accounting & Reporting (W/Th)
- DF: The 3 C’s of Higher Education Budgeting (Th) / Shared Services (Tu/W)
- EF: Change Management (prerequisite Lean Process Improvement) (Th) / Shared Services (Tu/W)
- BCD: The “Coach Approach” to Performance Management (Tu) / Lean Process Improvement (W) / The 3 C’s of Higher Education Budgeting (Th)
- BCE: The “Coach Approach” to Performance Management (Tu) / Lean Process Improvement (W) / Change Management (Th)

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

### Plus, Enjoy these Island Amenities After Class!

- Visit historic Pearl Harbor
- Hike Diamond Head Crater
- Much, much, more...

### Workshop Contacts:

Jeanette Perez: [perezjr@asu.edu](mailto:perezjr@asu.edu)  
Betsy Clark: [betsy.clark@usu.edu](mailto:betsy.clark@usu.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

- Breakfast, lunch, and snacks – February 27-March 1, 2018



### CPE Information

Note: CPE’s are subject to adjustment due to minor schedule modification.

Please visit [www.wacubo.org/cpe](http://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 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](http://www.learningmarket.org).



Photo courtesy of Waikiki Beach Marriott

## Waikiki Beach Marriott Resort & Spa 2552 Kalakaua Ave, Honolulu, HI 96815

### Book Your Room

- WORKSHOPS FILL QUICKLY, please re-serve Workshop before booking room and/or travel
- Room rates for WACUBO guests: \$224 per night\* - ***Room rate is valid through February 2, 2018***
- To reserve room: 808-922-6611 and mention WACUBO or book room online at [WACUBO Pacific Rim Workshop](http://WACUBO Pacific Rim Workshop)

\*Based on single occupancy plus applicable taxes 13.96% will be charged in addition to the room rates set forth above.

### Parking at the Hotel:

\$25 daily

### Transportation from the Airport:

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

**Robert’s Hawaii:** \$16 per person/one way – ON REQUEST

\*Must contact hotel prior to arrival