

May 24 - 26, 2017 | 8:30 a.m. – 4:30 p.m.
Hilton Anchorage, Alaska

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

Join WACUBO in beautiful Anchorage
for this three-day intensive workshop.


Negotiation

Negotiation skills are critical throughout all aspects of colleges and universities especially in creating value for your unit. Competition for resources, space, funding, equipment, and opportunities require techniques for successful negotiation. You will learn how to define interests, set priorities, and develop mutually beneficial strategies for all parties.

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

Understanding academic institutions budget processes can be challenging. Demystify the experience through case studies and discussions. This class is for those who need basic budgeting concepts. Attend this interactive workshop to gain budget competency, understand the relationship between accounting and budgets, and develop useful skills in connecting budgets to missions & goals.



WACUBO 
*Professional
Development
Workshops*

May 24th to mid-day May 25th

Negotiation

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

Key Takeaways

- Improved approach to professional and personal interactions that involve negotiation and give and take
- Toolkit for common interactions that involve everyday negotiation— personnel issues, budget/resource requests
- Understanding of common pitfalls in negotiations and how to mitigate those pitfalls

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 perspective and strategies that will support needs of higher education officers.

Workshop Agenda:

Wednesday

- 7:30 - 8:30 am: Registration and Breakfast
- 8:30 - 9:00 am : Opening Remarks, Speaker and Attendee Introductions
- 9:00 - 10:00 am: Basic Concepts
- 10:00 - 10:15 am: Break
- 10:15 - 12:00 pm: Preparing and Planning
- 12:00 - 1:15 pm: Lunch
- 1:15 - 2:30 pm: Preparing and Planning
- 2:30 - 2:45 pm: Break
- 2:45 - 4:30 pm: Opening and Bargaining

Thursday

- 7:30 - 8:30 am: Registration and Breakfast
- 8:30 - 10:00 am : Closing and Implementation
- 10:00 - 10:15 am: Break
- 10:15 - 12:00 pm: Tips and Tricks
- 12:00 - 1:00 pm: Lunch

Meet the Instructors

Nichol Luoma

Nichol is the Associate Vice President of University Business Services, Sustainability Operations Officer and Chief Procurement Officer for Arizona State University. 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

Kathleen has served as the Director of Procurement & Support Services for California State Polytechnic University Pomona since 2007. The Cal Poly Pomona team has been recognized the past ten years for Achievements of Excellence in Procurement by the National Procurement Institute and in 2015 received the Collaborative Innovation Award from California Public Higher Education Leadership. She currently serves WACUBO on the Professional Workshops Development Committee and Marketing Committee and previously has served as president of the Procurement & Support Services Officers Association. Prior to higher education she worked in material handling and logistics as an account manager, district manager and general business manager.

May 25th to end-of-day May 26th

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

Course Description

This one and a half-day highly interactive workshop will focus on 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 that they can immediately apply to their day-to-day work.

Learning Objectives

By the end of this workshop participants will:

- 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

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 Full Jumbo Workshop

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 department and academic units and who want to enhance their knowledge in budgeting processes and fiscal stewardship.

Workshop Agenda:

Thursday

- 1:00 - 2:30 pm: Concepts
- 2:30 - 2:45 pm : Break
- 2:45 - 4:30 pm: Concepts (continued)

Friday

- 7:30 - 8:30 am: Breakfast
- 8:30 - 10:00 am : Creation
- 10:00 - 10:15 am: Break
- 10:15 - 12:00 pm: Creation
- 12:00 - 1:15 pm: Lunch
- 1:15 - 2:30 pm: Creation/Connections
- 2:30 - 2:45 pm: Break
- 2:45 - 4:30 pm: Connections

Meet the Instructors

Lisa Frace

Lisa 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

Linda 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

Workshop	Member	Non-Member
Three-day workshop (May 24 - 26, 2017)	\$600	\$650

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

Workshop Contact:

Linda Cordier: lcordier@pima.edu

Cancellation Policy

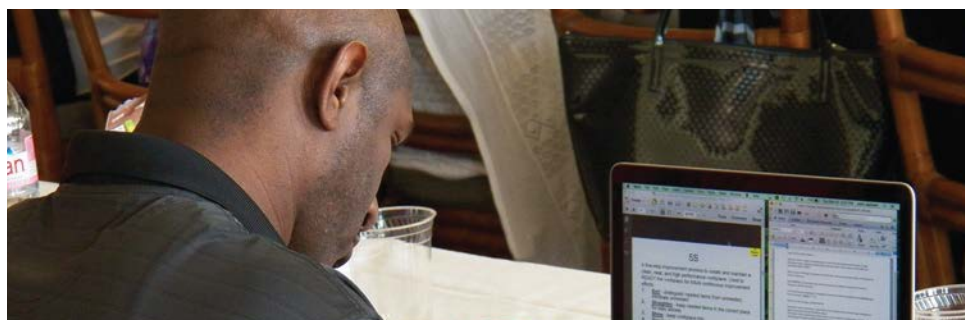
Refunds will be given upon written request 30 days prior to program, less a \$50 cancellation fee. Substitutions are allowed at any time at no additional charge.

Registration in this workshop includes the following:

- Breakfast, lunch, and snacks – May 24, 25, and 26

Popular attractions with in walking distance of the hotel!

- Lace up your hiking shoes for a walk on the Tony Knowles Coastal Trail
- Visit the Anchorage Museum, 5th Avenue Mall, or stroll around downtown.
- See the city with Segway Tours of Anchorage



CPE Information

Attendees of the Negotiation workshop will be eligible to earn approximately 11.5 CPE units in Management Advisory Services. Attendees of the Higher Education Budgeting Basics workshop will be eligible to earn approximately 11.5 CPE units in Business Management and Organizations.

Note: CPE's 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 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.



Photo courtesy of Hilton Anchorage

Hilton Anchorage

500 West Third Avenue
Anchorage, Alaska, 99501

Book Your Room

- WORKSHOPS FILL QUICKLY, please reserve Workshop before booking room and/or travel
- Room rate for WACUBO guests: \$209 per night* rate guaranteed until May 10, 2017
- To reserve room: 1-907-272-7411 and mention WACUBO or book room online at:

http://www.hilton.com/en/hi/groups/personalized/A/ANCAHHF-WACUBO-20170519/index.jhtml?WT.mc_id=POG

* Based on single occupancy, per night plus the current room tax of 12% (tax is subject to change), will be charged in addition to the room rates set forth above. WACUBO rates good for 4 days before and 3 days after workshop.

Transportation from Airport and Directions:

<http://www3.hilton.com/en/hotels/alaska/hilton-anchorage-ANCAHHF/mapsdirections/index.html>

Parking at the Hotel

Complimentary valet and self-parking is available for \$18/day. Day event parking is \$11/day.