



*Developing Higher Education Business Professionals*

## **WACUBO Joint Workshop Series: *The Coach Approach to Performance Management / Shared Services*** **Palm Springs, California – January 16-18, 2019**

### **The Coach Approach to Performance Management** **January 16**

Estimated 7.5 CPE hours in Personnel/Human Resources

#### **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.

There will be several interactive exercises in this workshop designed to build coaching conversation skills, practice applying the concepts, and create an action plan for further development of a coach approach. Participants will discover how to make coaching a habit that drives employee performance and professional development.

#### **Learning Objectives**

By the end of this skill-building workshop, participants will:

- 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
- Practice foundational skills for powerful coaching conversations
- Discover how the coach approach engages employees and facilitates their performance and professional development
- Create an action plan for further development
- Discover how to make coaching a habit that drives performance

#### **Who Should Attend**

This workshop is designed for higher education 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.

#### **Carina Celestia Moore**

MA, SPHR, CPLP, SHRM-SCP



Carina is Director of the Talent Management and Development at the University of California, Davis campus and UC Davis Health, with over 25 years of experience in learning and development, leadership development, succession management, performance management, career development, worklife, organization development, and coaching. Her UC Davis portfolio includes Staff Development and Professional Services, Training & Development, WorkLife, Performance Management, and Recognition and Rewards. Carina cultivates excellence in people and organizations through innovative programs and impactful organizational consulting. She has been an active member of WACUBO since 2004 (Current Board member and Professional Development Steering Committee member, chair of the Mentoring Program, speaker at annual conferences and regional workshops, member of conference program committees, and faculty at the Business Management Institute. Carina is a certified Senior Professional in Human Resources (SPHR), Society of Human Resource Management Senior Certified Professional (SHRM-SCP), is a Certified Professional in Learning and Performance (CPLP), and is in the process of pursuing an International Coach Federation (ICF) Associate Certified Coach (ACC) designation. Carina currently serves as Adjunct Faculty at University of the Pacific in the Master of Arts in Organizational Learning and Effectives program. She served as Adjunct Faculty in the Counselor Education graduate program at California State University – Sacramento. Carina holds a Masters degree in curriculum and teaching from Columbia University Teachers College in New York.

## Course Description

Shared Services is a well-tested method of service delivery that has emerged in higher education in the last decade. This workshop delves into the process for assessing, establishing, and managing a shared services center, including the potential challenges and opportunities. This highly interactive workshop gives participants the opportunity to not only learn about shared services but to explore aspects of implementation that can be used back at their institutions.

## Learning Objectives

- Develop knowledge of shared services, including what “is” and what “isn’t” shared services
- Compare models of shared services and difference from centralization
- Describe steps to design, build, and implement shared services
- Understand role of stakeholders in implementing shared services
- Explore concepts related to success factors for managing shared services

## Who Should Attend

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.

### Megan Glide Villasenor, MS



Megan works in the University of California, Davis Shared Services Organization, a department that provides partner-focused support services in the areas of human resources, payroll, and procurement to both the campus and health system. She has a Master of Science in Business Administration and has been with the University of California for 12 years, with time spent working at both the Davis and Berkeley campuses.

Megan is also a passionate volunteer in her community, including currently chairing her church council and previously serving as board president for the Mary Elizabeth Inn in San Francisco. Megan enjoys spending all of her free time with her husband and their five children.

### Sara Reed, Ed.D



Sara Reed has over 20 years of experience in leadership, management, organizational change, and leadership development and is passionate about helping people and organizations reach their potential. She serves as the Associate Vice President for People and Workplace Culture at Salt Lake Community College. Previously, Sara served as the Executive Director of the Shared Services Center at the University of California, Davis. She joined UC Davis in 2012 as a Chief Administrative Officer, supporting four academic departments.

In July 2014, Sara became the Director of the Shared Services Center, providing partner-focused support services for the UC Davis campus. Sara led her team through team redesigns, designing and executing a campus and client engagement strategy, which resulted in high client satisfaction and growth of the service center. Sara continues to advise and provide consultation to higher education institutions in shared services, leadership development, and change management. She is an active WACUBO volunteer and chairs the Professional Development Workshop Committee.

## **Agenda – The Coach Approach to Performance Management**    **January 16**

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### **Wednesday, January 16:**

7:30 – 8:30 am	Buffet Breakfast
8:30 – 10:00 am	Foundation for the Coach Approach
10:00 – 10:15 am	<b>Break</b>
10:15 – 12:00 pm	Coaching Skills for Every Manager and Supervisor
12:00 – 1:00 pm	<b>Lunch</b>
1:00 – 2:00 pm	Coaching Skills for Every Manager and Supervisor (continued)
2:00 – 2:30 pm	Coaching Practice, One Conversation at a Time
2:30 – 2:45 pm	<b>Break</b>
2:45 – 4:15 pm	Coaching Practice, One Conversation at a Time (continued)
4:15 – 4:30 pm	Planning for Action

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## **Agenda – Shared Services**    **January 17-18**

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### **Thursday, January 17:**

7:30 – 8:30 am	Registration and Buffet Breakfast
8:30 – 9:00 am	Opening Remarks and Speaker/Attendee Introductions
9:00 – 10:00 am	What is Shared Services?
10:00 – 10:15 am	<b>Break</b>
10:15 – 12:00 pm	Assessing Your Current State
12:00 – 1:00 pm	<b>Lunch</b>
1:00 – 2:30 pm	Design Your Shared Services
2:30 – 2:45 pm	<b>Break</b>
2:45 – 4:30 pm	Build Your Shared Services

### **Friday, January 18:**

7:30 – 8:30 am	Buffet Breakfast
8:30 – 10:00 am	Build Your Shared Services (continued)
10:00 – 10:15 am	<b>Break</b>
10:15 – 12:00 pm	Deploy Shared Services
12:00 – 1:15 pm	<b>Lunch</b>
1:30 – 2:30	Managing & Leading Shared Services
2:30 – 2:45	<b>Break</b>
2:45 – 4:00	Manage & Wrap up



## Hotel and Travel Information

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**Renaissance Indian Wells Resort and Spa**, 44400 Indian Wells Lane, Indian Wells, CA 92210-8708.

**Phone:** (760)773-4444.

**Room rate:** \$189 per night, plus tax and a discounted mandatory resort fee of \$15 per day.



### **Palm Springs International Airport (PSP)**

<http://www.palmspringsca.gov/government/departments/aviation-palm-springs-international-airport-psp>

**Hotel direction:** 15.5 miles SE

**Alternate transportation:** Access Destination Services on request

**Estimated taxi fare:** 55 USD (one way)

#### **Driving directions:**

Turn left on Kirk Douglas, then left on Ramon Road to Interstate 10 East. Take Interstate 10 East to Cook Street. Turn right on Cook Street, go 4 miles to Hwy. 111 and turn left. Then 2 miles to Indian Wells Lane and turn left. The resort will be on your right.

### **Ontario International Airport (ONT)** – <https://www.flyontario.com>

**Hotel direction:** 86.5 miles SE

**Alternate transportation:** Shuttle Me Five Star; fee: 160 USD (one way); reservation required

**Estimated taxi fare:** 200 USD (one way)

#### **Driving directions:**

Exit Ontario Airport to Archibald Avenue North. Take Archibald Avenue to Interstate 10 East. Take Interstate 10 East for 83 miles. Exit Cook Street and turn right. Go 4 miles to Hwy. 111 and turn left. Go 2 miles to Indian Wells Lane and turn left. The resort will be on your right.

### **WACUBO Contact Information**

Heather Heersink, WACUBO Professional Development Workshop Committee – (719) 587-7759  
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