

WACUBO

Western Association of College and University Business Officers

Workshop Series

March 27-29, 2017 - San Diego, California

Attend One or Both of the following workshops

Shared Services

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.

See the following pages for more details

Program and Change Management

The world of the academic and unit business officer is changing—are you prepared? Attend this interactive workshop to build your foundation for success. Discover new ways to support and advance your organization.

See the following pages for more details

Course Registration

www.wacubo.org/workshops

Workshop	Member	Non-Member
Both Workshops (March 27-29, 2017)	\$600	\$650
Shared Services ONLY (March 27-28, 2017)	\$400	\$450
Project and Change Management (March 28-29, 2017)	\$400	\$450

Please advise at the time of registration if special accommodations are required.

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.

Workshop Contacts:

Natalya Brown: Natalya.Brown@umpqua.edu

Nancy Herbst: NHerbst@UCSD.edu

Hilton San Diego Airport/Harbor Island

Group rate of \$179 per night

The group rate will be offered based on availability and for reservations made by March 10, 2017.

For reservations call (619) 542-5130 or Click [here](#)

\$179 per night (Code: WACUBO)

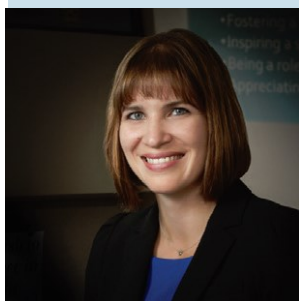


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Shared Services (March 27-28, 2017)

Instructors



Dr. Sara Reed has almost 20 years of experience in organizational development, management, organizational efficiency, and leadership development. She currently serves as Executive Director of the UC Davis Shared Services Center.

She joined UC Davis in 2012 as the Chief Administrative Officer for the BFTV Cluster, supporting four academic departments. In July 2014, Sara began leading the UC Davis Shared Services, providing partner-focused support services, including human resources, payroll, purchasing, accounts payable, and customer service for the UC Davis campus. Sara has served the UC Davis community by serving in a leadership role for the Administrative Managers Group, leading the foundation of a Veteran Constituency group, working to create a networking program across the Davis/Sacramento campuses, and teaching leadership workshops for undergraduate students. She was recognized in 2016 as a Chancellor STAR for her efforts. Sara served as an active duty military officer, leading teams across the globe, and continues to serve as a Reserve officer. She earned a doctorate from Drexel University, a MA.Ed. from CSU – Sacramento, M.S. from Troy State, and a BA

Key Takeaways

- Key concepts relate to what “is” shared services and what “isn’t”
- Types of shared services
- Why implement shared services
- Challenges and opportunities in implementation and in management of shared services
- Analyze elements of your organization/institution in consideration for implementing shared services, including stakeholders, technology, process and people

Course Description

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.

Learning Objectives

- Develop knowledge of shared services, including what “is” and what “isn’t” shared services
- Compare models of shared services and how they are different from centralization
- Describe steps to implement shared services
- Understand roles of stakeholders in implementing shared services
- Explore concepts related to success factors for managing shared services

Date/Time

Monday, March 27, 2017 8:30 am - 4:30 pm
Tuesday, March 28, 2017 8:30 am - Noon
(Included: continental breakfast both days and lunch on Mon. Lunch provided Tues. for those attending both workshops)

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.

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Project and Change Management (March 28-29, 2017)

Instructors



Bridget Wikidal, PMP is Director of the Project Management office in 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, a certified Change Management Practitioner and Trainer and is a member of the

Council on Library and Information Resources (CLIR)/ Educause 2015 Leading Change Institute. Bridget has been with the California State University Chancellor's Office for 10 years and has built a Project Management/Change Management Office that provides specialized support, services and training to the University in the areas of project management, change management, business analysis, facilitation, documentation and content management.

Scott McAllister is 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.

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
- An Action Plan to track and drive a "real live" improvement effort at your university.

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. 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 shared services projects. This program will explore the Project Management Institute's (PMI) PMBOK best practices and the Prosci ADKAR Model and demonstrate how your institution can build a structured and effective project and change management capability.

Learning Objectives

- Understand the Prosci ADKAR Model of change management and how it can benefit your institution
- Understand change management critical roles including sponsor, manager/supervisor, change manager, and project manager
- Take away a change management process to use for organizational change and change projects

Date/Time

Tuesday, March 28, 2017 1:00 pm - 4:30 pm
Wednesday, March 29, 2017 8:30 am - 4:30 pm
(Included: continental breakfast both days and lunch on Wed.
Lunch provided Tues. for those attending both workshops)

Who Should Attend

This workshop is designed for individuals at all levels of the institution with a desire to learn the basics of project management and change management. Participants should come prepared to use a familiar project from their work place as a foundation for project and change management activities. No prerequisites required.

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Hilton San Diego Airport/Harbor Island

1960 Harbor Island Drive

San Diego, CA 92101

A quick five minutes from the airport, the Hilton San Diego Airport/Harbor Island provides guests with a complimentary shuttle service to and from the airport, making your arrival and departure a breeze. Hotel guest parking rates are \$18 per day. For more hotel information click [here](#).



Things to do in San Diego, California

The Hilton San Diego Airport/Harbor Island is close to many attractions, such as Petco Park, where the San Diego Padres play baseball. Seaport Village Shopping Center is only a few minutes away and sports 50 stores, restaurants, and entertainment venues. Perhaps you'd like to take your family to SeaWorld San Diego to view a wide variety of aquatic creatures, or to the San Diego Zoo to see more exotic land animals. Balboa Park often has free concerts at the Spreckels Organ Pavilion, while Mission Bay Park has plenty of jogging and biking trails. You can find more information on these and other activities at the following links:

- Birch Aquarium (<https://aquarium.ucsd.edu/>)
- La Jolla Cove (<https://www.sandiego.gov/lifeguards/beaches/cove>)
- La Jolla Shores (<https://www.sandiego.gov/lifeguards/beaches/shores>)
- San Diego Zoo (<http://zoo.sandiegozoo.org/>)
- San Diego Zoo Safari Park (<http://sdzsafaripark.org/>)
- Sea World (<https://seaworldparks.com/en/seaworld-sandiego>)
- Torrey Pines State Beach and Reserve (<https://torreypine.org/>)
- USS Midway Museum (<http://www.midway.org/>)

CPE Information

Attendees of **Shared Services** workshop will be eligible to earn approximately 11 CPE units in Management Advisory Services.

Attendees of **Project and Change Management** workshop will be eligible to earn approximately 11 CPE units in Management Advisory 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.