



Another Enriching Summer: WACUBO Institutes Gear-Up

BY CYNTHIA TENIENTE-MATSON, INSTITUTES COMMITTEE CHAIR



UNIVERSITY OF CALIFORNIA, SANTA BARBARA

The institutes committee, has been hard at work preparing for another exciting and enriching summer of learning at WACUBO's institutes. For many years, WACUBO has offered two premier institutes each summer: the Executive Leadership and Management Institute, and the Business Management Institute. Both have been popular with WACUBO members and have strong reputations among the many institutes available.

The new challenges faced by all campuses have made us aware of the need to have well informed and thoroughly prepared administrators. As funding cutbacks and new issues emerge, it is vital to remember that professional development is a wise and necessary investment. WACUBO's central mission is to make those opportunities available to all members.

For 2010, there are several changes designed to improve the ability of these institutes to meet the needs of WACUBO members. The institutes committee, with guidance from the WACUBO Board of Directors has worked hard to refine the curriculum and logistics in order to best meet the needs of our membership. The committee has thoroughly analyzed each institute's budgets in order to keep costs low, and provide one of the best values in higher education professional development.

The Executive Leadership and Management Institute will move to the University of Southern California, one of the world's premier research universities. The accommodations and meeting facilities are outstanding. In addition, there are excellent social spaces for informal networking. The institute will kick off on August 7th and last through August 12th. Registration is currently underway.

The Business Management Institute will return to the beautiful oceanside campus of the University of California, Santa Barbara. The dates are August 1st through August 5th. The program's curriculum has been consolidated. The institute will conclude late Thursday afternoon, instead of late Friday morning. This change was made to recognize the demands on, and value of, the time of campus administrators. In addition, WACUBO has moved accommodations to Manzanita Residence Hall; the newest on campus and overlooking the Lagoon. Additional information about the institute as well as registration information will be available on www.wacubo.org by June 1st.

We hope you will seriously consider sending staff to one of WACUBO's renowned institutes. Both institutes continue their legacy of exceptional programming, but presented and framed in ways that reflect the new environment of higher education. Thanks to the institutes committee for their hard work; Kim Kvaal, Bill Pickens, Mike Unebasami and Lyrae Williams! For more information, please visit www.wacubo.org or contact Bill Pickens, at whpickens@aol.com.

Inside This Issue

ELMI Registration now open	pg. 2
Ask an Expert	pg. 2
Letter From the President	pg. 3
WACUBO Newsletter Gets a New Look!	pg. 4
In Profile: University of Alaska Fairbanks	pg. 5
NACUBO Board Update	pg. 6
2010 Annual Meeting: "Let the Magic Begin!"	pg. 7
Annual Meeting Sponsors Ensure an Excellent Event	pg. 8
Our Stories: The Value of Volunteering	pg. 9
Developing an Effective Business Services Team	pg. 10
Process Improvement Essential to Success	pg. 11

■ Registration Now Open: Executive Leadership and Management Institute

BY BILL PICKENS, INSTITUTE DIRECTOR

The Institute

WACUBO is pleased to announce that the 2010 Executive Leadership and Management Institute is now open for applications. In its 43rd year, the institute's mission is to offer participants a premier experience in leadership development within the culture and circumstances of higher education institutions.

The institute is a "total immersion" experience for five solid days --a time for in-depth thought about each person's style of leadership. It is a balance of study, intensity, and fun. For 2010, we will be welcoming back several faculty from previous years as well as adding some new faces to speak on new topics important to higher education business executives.

The institute is rigorous and interactive, emphasizing in-depth discussion of issues, with time to explore and reflect. Participants are challenged by ideas and conversations which break down the barriers to honest exchange. The result is change in styles and perspectives, along with the opportunity to establish a professional network that can last a lifetime.

The ELMI's central feature is its conscious tailoring to the needs and situation of each participant, and so enrollment is limited to 35. The experience is not simply about leadership in general but how each person can see specific ways to exercise leadership and be more effective on campus.

For 2010, the institute will be conducted at the University of Southern California (USC), one of the most vibrant universities in the world. The facilities are first-rate and well aligned for the executive-level education of the ELMI. For the institute's goals, USC ideally provides "retreat style" accommodations within an extremely impressive institution of higher education.

Registration

Your registration and application are welcome for 2010. First, please visit www.wacubo.org to learn more about the institute. Then, contact Bill Pickens, Institute Director at whpickens@aol.com. Please include your name, title, campus or agency, office address, telephone, and email address.

Thank you for considering WACUBO's Executive Leadership and Management Institute!

? Ask An Expert

Q: How do I keep sustainability in the forefront in spite of difficult budget times?

A: Our campus sustainability program, which operates on even less than a "shoestring budget" is moving forward in spite of seemingly insurmountable fiscal challenges. How do I do it? First and foremost, the sustainability program here at Fresno State has a solid foundation (our sustainability committee) and enjoys solid support over a broad base of the campus community. When I designed the make-up and function of the sustainability committee, I doubled the typical faculty representation for an administrative committee and I tripled the student representation. The faculty on the committee lead, plan and operate our Earth Day celebration each spring and the students on the committee do the same for sustainability day in the fall. The staff representatives provide guidance, support and resources as needed to put together these two events and deal with all the other sustainability issues that come up. Although our sustainability coordinator position was cut two years ago, I've had the help of a student employee that is an Honors College student and a student government senator. Being so well tied-in to the pulse of campus, she is a tremendous benefit to the program.

Another thing I do is work cooperatively with the City of Fresno and other governmental bodies, plus some social services agencies, in many areas of sustainability. Our most formal cooperative agreement, signed in 2007, set up a "UniverCity" partnership with the City of Fresno. This agreement set the stage for a number of cosponsored or co-supported activities, all in an effort to keep sustainability issues "out in front." In addition, I serve as a member of a number of City and County committees that are tackling issues of planning, housing, and transportation in the central San Joaquin Valley. As a result, even though our campus has a very limited budget for sustainability, I can take advantage of the sustainability momentum that is being generated by those parties that still do have a budget. I return the favor by providing volunteers, venues, and publicity for local and regional sustainability initiatives and events.

David M. Moll is Assistant Vice President for Risk Management and Sustainability at California State University, Fresno.

■ Many Thanks for a Memorable Year!



DENNIS KLAUS, WACUBO PRESIDENT

It hardly seems possible that a year has gone by and that I am writing my last quarterly letter as your President. It has truly been an honor and pleasure to serve as your leader over the past year. I remain grateful for your trust, support and counsel.

Just as spring brings with it new growth and change, WACUBO has experienced much positive growth over the past year. The professional development committee has provided a full year of extremely successful and enriching workshops,

most of which exceeded enrollment capacities. Many thanks to Kim Kvaal and Lyrae Williams for co-chairing this year's committee as well as to the dedicated committee members for their tireless work in making our workshops successful and enriching.

WACUBO's institutes also experienced another successful year. The Winter Management and Leadership Institute (WMLI) moved from Tucson to picturesque Mission Bay in San Diego, California. The curriculum for the WMLI was revamped and modified to address current issues most critical and pertinent to our members. Thanks to Chris McAlary and the Small Institution Committee for their extra efforts to ensure the success of the WMLI at its new

venue. Additional kudos go to Pat Oliver and the University of San Diego for their tremendous support provided to our newest institute.

Thanks to Bill Pickens and Monica Boulay for their direction of WACUBO's two summer institutes, the Executive Leadership and Management Institute (ELMI) and the Business Management Institute (BMI) I extend my deepest thanks and appreciation. Further, the WACUBO Board of Directors is currently undertaking a thorough review of curriculum, venues, and formats of all three institutes in an ongoing effort to meet professional development goals and better serve the needs of WACUBO's membership. I remain deeply appreciative to the entire WACUBO Board of Directors for all their efforts on behalf of the membership.

I also wish to express special thanks to our board members that will be retiring from the board this May. First, my heartfelt thanks goes to Mike Unebasami, who has been a long time mentor of mine, whose dedication and tireless service to WACUBO will not be forgotten. Next, deep appreciation is extended to Monica Boulay who so successfully directed the BMI in Santa Barbara for over a decade and helped to establish the WMLI. Her contributions to our institutes will not be forgotten. And last, but far from least, I can not express enough gratitude to Pat Oliver who has chaired the Information Exchange Committee for many years, served as WACUBO President on top of coordinating the annual meeting registration process. We will deeply miss Pat's, Mike's, and Monica's presence, dedication, and shared wisdom but look forward to reconnecting with them at future WACUBO events and meetings.

Finally, it's not too late to register for our Annual Meeting in Anaheim, California scheduled for May 2nd to the 5th! Harold Hewitt and Gregg Goldman, co-chairs of the Annual Meeting

CONTINUED ON PAGE 4

SUBMISSION OF ARTICLES

Submission of articles: We welcome articles from individuals on a variety of subjects that would be of interest to members of our specific industry. WACUBO also solicits articles from vendors in various industries that are essentially generic in nature, that describe current trends in the industry, and that are of interest to business officers in higher education. The articles are expected to be educational or informative but not favoring any one particular vendor. A byline including the author's name, position and institution will be included. Articles should be brief (500-750 words). Submit all articles in the body of an e-mail message, or as a text document attachment to an e-mail message addressed to tgaffery@csufresno.edu. The WACUBO newsletter is published quarterly by the University of Washington, on behalf of the Western Association of College and University Business Officers. Copyright 2008 by the Western Association of College and University Business Officers, unless otherwise indicated.

CHANGE OF ADDRESS

For change of address, use MY NACUBO (www.nacubo.org) or send changes to: member.info@nacubo.org

Letter From the President (Continued)

Host Committee, have assured me that the weather in Anaheim for the Meeting will be spectacular and the planned events will be magically memorable. Dan Morris and his program committee guarantee that the program will be thought provoking, captivating, educational, and will truly “create magic in these difficult times.”

Last but not least, a special thanks to Harold, Gregg, Dan, and all of the WACUBO board and committee members who, as dedicated volunteers, have sacrificed so much of their time and energies to

make this past year so successful and enriching. With profound gratitude, I tip my hat and bow deeply to you all!

As always, I sincerely encourage you to contact me at dennis.klaus@slcc.edu with your thoughts and ideas regarding how we can continue to improve WACUBO’s service to its membership.

I look forward to seeing you all in Anaheim!

All the best,

Dennis

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Newsletter Editor Tom Gaffery

WACUBO Newsletter Redesigned with an Exciting New Look!

BY TOM GAFFERY, NEWSLETTER EDITOR

After taking feedback from colleagues and a lively discussion at the January 2010 WACUBO Board of Directors meeting, I am proud to unveil the new look and feel of the WACUBO Newsletter! Special thanks to our graphic designer Joel Beery for his hard work!

This refreshed newsletter was designed to represent the fast paced nature of our campuses and daily lives as well as the forward momentum in which WACUBO helps us move with respect to our careers and professional development.

The most noticeable change is that the lead story is now on the front page of the newsletter. In collecting feedback from readers, this was one of the key desires that was expressed. In addition, a table of contents was added and more photos were added throughout to make the reading experience more lively and engaging. The campus profile and ask an expert columns will now be regular features in each issue.

Stay tuned in the coming issues for other exciting changes to the newsletter as we continue to add content and revise presentation of information to best meet the needs of our membership.

If you have any comments on the new look, or ideas for articles or continuing pieces, please feel free to contact me at tgaffery@csufresno.edu.

Visit www.wacubo.org to view past issues of our Newsletter

IN PROFILE: University of Alaska Fairbanks



UAF: AMERICA'S ARCTIC UNIVERSITY

Alaskans take great pride in their individuality, and Alaska's flagship university is no different. As America's arctic university, the University of Alaska Fairbanks plays a key role in studying the unique social and physical characteristics of the Far North.

Our location defines us: what we are, teach and research, in classrooms and labs in small cities and large towns; on arctic tundra, alpine slopes and temperate rain forests; and in Alaska's oceans and rivers.

Whether it's climate change or anthropology, space physics or biology, UAF excels in teaching and researching issues of the circumpolar North, and in applying that knowledge to serve northern peoples and communities, with a particular emphasis on Alaska Natives.

The Alaska Agricultural College and School of Mines opened its doors in 1922. The school grew quickly, and in 1935 became the University of Alaska. By the time Alaska became a state in 1959, students could earn Ph.Ds at the university. Now known as the University of Alaska Fairbanks, UAF is the only campus in the state that awards doctoral degrees. More than 25,000 students have graduated from UAF, with roughly a thousand more joining their ranks every year.

Today, UAF comprises eight college and schools: the colleges of Engineering and Mines, Liberal Arts, Natural Science and Mathematics, and Rural and Community Development; and the schools of Education, Fisheries and Ocean Sciences, Management, and Natural Resources and Agricultural Sciences.

UAF is the principal research center for the statewide university system, and generated \$106 million in research expenditures in 2008-2009. It emphasizes high-tech, high-latitude research in seven major research units.

Students can choose from nearly 200 certificates and degrees in more than 120 disciplines. Because some campuses function more like a community college, while others like an advanced-degree

institution, students can find classes and programs that fit their academic and professional needs, from taking a refresher math course to pursuing postdoctoral studies.

Enrollment is typically around 10,000, with about half at the main campus in Fairbanks and most of the rest attending one of the community campuses in Bethel, Dillingham, Fairbanks, Kotzebue and Nome. Other students take classes through learning centers throughout the interior and western and southwestern Alaska. They come from Alaska, most other states, and some 50 foreign countries. More than 200 are international students. To accommodate its many nontraditional students who may have families and full-time jobs, UAF offers evening, web-based and independent learning classes.

The practical application of research to real-world problems in areas such as energy conservation, mineral extraction and fisheries management is

“ UAF helps Alaskans improve the quality of life in the Great Land. ”

part of UAF's economic drive as well. UAF also has an extensive system of community outreach programs to help Alaskans in their everyday lives, with practical, research-based advice on everything from canning blueberries to insulating one's home.

The university plays an important social and cultural role in communities throughout Alaska, with a public radio and television station, lectures, musical and theatrical performances, art exhibitions and the like.

Our mascot, the Nanook (Inupiaq Eskimo for polar bear), brings out fans of basketball, cross country running and skiing, hockey, rifle, swimming and volleyball.

Perhaps no other institution or organization plays such a diverse and integral role in the lives of so many Alaskans. UAF sponsors popular community events and highly technical research. It employs carpenters and physicists, and teaches children and senior citizens. It offers cooking classes to the domestically minded and Ph.Ds to the insatiably curious. Through programs of education, training, entertainment and information, UAF helps Alaskans improve the quality of life in the Great Land.

■ NACUBO Board Continues Forward Momentum

BY CYNTHIA TENIENTE-MATSON, PAST PRESIDENT

The NACUBO Board of Directors convened in March 2010 in Washington D.C. for its quarterly meeting. The cherry blossoms were in bloom and the whole town was abuzz with talk about health care.

Initiatives Underway

The first day of the meeting was spent on board-staff briefings on several important NACUBO initiatives:

1. **CAO-CFO Census:** This is an exciting project that uses a survey instrument based on the American Council on Education's CAO Survey. It includes a multitude of questions targeted to Chief Academic Officers, Chief Financial Officers and their role in higher education. More on this survey will be released summer 2010.
2. **Smart & Sustainable Campuses Virtual Conference:** NACUBO is venturing into offering live sessions via webcast. This activity was held March 23 and was a terrific virtual experience for the NACUBO members who were unable to be onsite for the conference.
3. **International Resource Center:** NACUBO is diligently working at improving its visibility and support for initiatives that involve working abroad, offering programs abroad and addressing current issues for colleges and universities doing business abroad.

The NACUBO ad-hoc communications committee is in the final stages of reviewing a comprehensive thought piece that addresses the cost of higher education. This document contains sufficient detail to give an overview of the varying types of institutions, their budgets, costs and tuition structure. This is a culminating project that should help members tell the story of higher education finances and cost models with its local media or community groups.

The NACUBO Finance and Audit committee reviewed the 12-month investment performance for the period ending January 31, 2010; the current financial position for the recent quarter, and the proposed budgets for fiscal years 2011 and 2012. The committee heard a report from Todd Ihrig of H.D. Vest Advisory Services. The committee asked for further recommendations to affirm the investment portfolio has the appropriate holdings within the current investment policy, risk standards and investment quality. Our liquidity position remains strong. In all, the NACUBO financial position remains strong and the finance committee remains committed to its fiduciary responsibility to its members. The committee reviewed two preliminary budget scenarios both of which involved a fee increase to the membership effective 2011-2012. The committee is recommending a 4% increase. Further work is being done to determine if NACUBO will be required to undergo a 403(b) audit.

Strategic Plan

NACUBO is in the process of finalizing its strategic plan. The three major goals that are being circulated for review are:

Goal 1: Equip business officers with the knowledge and resources needed to succeed.

Goal 2: Present the case for the value of higher education and advocate for policies that support colleges and universities.

Goal 3: Identify new challenges facing higher education and expand offerings to address future issues.

The next NACUBO Board update will come from Dennis Klaus, as he enters the role of Past President of WACUBO.

The NACUBO Board will convene in July at the NACUBO Annual Meeting in lively San Francisco, California. I hope to see you all there!

Scholarship Opportunities Available!

Various scholarship opportunities are available for WACUBO's many professional development offerings. For more information, please contact:

CDRIC Institutions

Tom McWhorter • mcwhort@usc.edu

Small Institutions

Chris McAlary • cmcalary@msmc.la.edu

Community Colleges

John Carroll • jcarroll@pima.edu

2010 Annual Meeting: "Let the Magic Begin!"

BY DAN MORRIS, PROGRAM COMMITTEE CHAIR



In these difficult economic times, we are all facing hardships and would like to focus on changing these obstacles by presenting a light flair of magic to overcome today's challenges. By doing so, this year the Program Committee team has diligently prepared a wide range of topics covering personal and technical skills. We have put our heads together to create an awesome theme "Creating Magic in Difficult Times" for the 72nd WACUBO 2010 Annual Meeting to be held in Anaheim, California at the

Disneyland Hotel.

Opening night will take place in Downtown Disney at the House of Blues. As a counterpoint to the gravity of these difficult times, the mood for this event will definitely be festive, attire will be casual, and the evening will close with an amazing 10-piece band covering the best of classic rock from the 60's through contemporary popular music.

To begin the program, Brad Montgomery will open with "Ordinary Magic: The Funny Business of Happiness". Brad is a professional and motivational speaker, publisher and author, and software developer. Brad helps organizations deal with change and improve morale. His program is very energetic, positive, and will tickle your funny bone. Each participant will experience laughter in their hearts, leave with a spring in their steps, feeling good about themselves and hopeful for the future.

Continuing with the program, the committee has arranged for speakers to educate, inform and spark up their specific topics that are a must for business officers today. The following is a summary of the upcoming general sessions that are being offered at the annual meeting.

Jason Dorsey will present "Crossing the Generational Divide." Jason is a bestselling author and a well-known generational expert. Jason will teach education leaders creative and inexpensive ways to maximize Gen Y employee performance while leveraging the strengths of all four generations in the classroom and workplace.

Tom Tripp focuses on "Preventing Revenge in Bad Times: Be Fair, Look Fair" in his session. Tom is a professor of Management at Washington State University Vancouver. Participants who attend this session will learn what kinds of "unfair" outcomes prompt revenge considerations, and what kinds of procedures squelch revenge considerations.

Mary O'Hara-Devereaux is the president of Global Foresight and will present "Finding Targets No One Else Can See – Creating the Future Magic in Higher Education." Mary is a legendary business forecaster in these volatile times.

Disney Institute has joined our lineup and will present "Disney's Approach to Quality Service." The participants will learn how to improve quality service by immersing themselves in the successful Disney model. This will include how to observe attention to details, design a training program for employees and anticipate the needs, wants and emotions of your customers.



DISNEYLAND HOTEL

Along with the keynote address and general sessions, the program committee has invited speakers who will revitalize you, provide valuable insights and share professional information you can use for your own personal growth and professional

insight. These concurrent sessions include: Performance Measurement, Accounting Update, Red Flag, Social Networking-Lingo, Emergency Planning, Economic and Demographic Trends, Appreciative Inquiry, Conflict Escalation, Magic of Bowties, and Eggshell Conversations. Let's not forget our enticing "Tales from the Front" presentations.

The closing event will take place in the Grand Ballroom of the Disneyland Hotel and will feature another excellent band plus a few magical surprises.

One of the best features of WACUBO is the opportunity the association provides to volunteer. Your colleagues serving on this year's Host and Program Committees demonstrate the merit of service—their energy and commitment has contributed to a fantastic social agenda in support of the program. The committees include business officers and support staff from large and small institutions ranging from community college to comprehensive research and doctoral institutions.

We encourage you to mark your calendar and make your reservations to join us in these magical moments during the WACUBO Annual Meeting at the Disneyland Hotel in Anaheim, California. See you soon!

Annual Meeting Sponsors Ensure an Excellent Event

BY PATRICIA OLIVER, IEP COMMITTEE CHAIR

The Disneyland Hotel in Anaheim, California will be the perfect venue to blend a little fun with the format of the program, “*Creating Magic in Difficult Times*,” and will give you every opportunity to take advantage of the information exchange sessions and events. Our corporate partners will be present to discuss the challenges and opportunities you face and to share their expertise. Relationships developed in these casual but informative conversations benefit both the WACUBO membership and our business partners. First, I take pleasure in encouraging you to participate in the WACUBO Golf Tournament on Sunday morning. The event will be held Black Gold Country Club located in the foothills of Yorba Linda, nestled against Chino Hills State Park. The doors to our exhibit hall will open at 2 pm for the Information Exchange program as well as an Ice Cream Social sponsored by *Wells Fargo Bank*, one of our three Platinum Sponsors. Come join us for food and early arrival prizes in the South Exhibit Hall to see what new products and services our business partners have to share.

Longtime Platinum Sponsor *Follett Higher Education Group* continues the sponsorship of WACUBO’s opening reception and dinner in Downtown Disney at the House of Blues. There will be

no shortage of fun and music at this year’s event. Monday night, save time to join friends at their favorite hospitality event Sweets in the Suite — another WACUBO annual meeting signature event sponsored by *Pat Usher* and *Follett Higher Education Group*.

Tuesday afternoon’s member appreciation luncheon, sponsored by *Moss Adams, LLP*, promises to be a special treat for all with “magic” as the theme for this year’s entertainment. Before the meeting closes you do not want to miss the annual reception sponsored by *George K. Baum & Company* as a prelude to the annual banquet and dance, enlivened by the sponsorship of *Bank of America*. We value the support of WACUBO’s business partners provide to the organization and the annual meeting. Their participation gives you higher quality and greater affordability, plus their continuing commitment to higher education administration helps each of us in understanding how “*Creating Magic in Difficult Times*” can help us now and into the future.

Finally, a special thank you is extended to *Arthur J. Gallagher & Co.* for their generous support on behalf of our organization and annual meeting.

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Our Stories:

The Value of Volunteering

BY KIMBERLY KVAAL & LYRAE WILLIAMS, PROFESSIONAL DEVELOPMENT COMMITTEE CO-CHAIRS

What is your first response when someone asks you to help through volunteering? Do you groan inwardly? Do you think, “Oh boy, I’m in for it now”? Do you think, “I don’t have time to volunteer. I can’t keep up with my real job.”? Or, do wonder how the contribution of your time can positively impact those around you and you raise your hand to join in?

Are you looking to gain knowledge and grow professionally as you support your region and give your time to promote its mission? If so, the PDC is currently seeking new members and site coordinators. Please contact Kim Kvaal kkkvaal@usfca.edu or Lyrae Williams Lyrae.Williams@ColoradoCollege.edu to discuss what could be a very important “Yes!”



LYRAE WILLIAMS

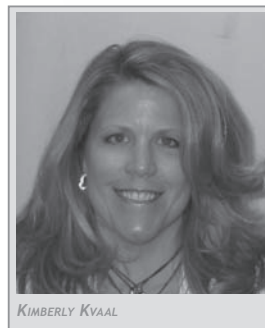
In August 2001, I attended my first WACUBO program, the Business Management Institute in Santa Barbara, CA. I was so impressed with my first WACUBO experience, that I continued attending events even in the years that I lived and worked on the east coast. WACUBO delivers relevant, cost-effective programs to its constituents. Beyond the program content; the networking and relationship building that occurs has impacted my life both professionally

and personally. I knew after my first program, that I wanted to be involved with this exciting organization.

When I interviewed for my current position, I asked my Vice President if he would support my involvement with WACUBO. Being a past president of WACUBO, Tom Nycum grinned widely as he nodded his head in support. Within a few months of my tenure, I was selected to be on the small institutions committee and serve as liaison to the professional development committee. Since that first appointment, I have presented at one of the institutes, been asked to co-chair the PDC and be a part of the programming for this May’s annual meeting.

My professional growth, specifically in teamwork and leadership, has enhanced my value to my institution. The time and effort put into volunteering comes back to me in so many ways, that I do not believe I could put a value on what it has done for me professionally and my organization.

**Next WACUBO Annual Meeting
Portland, OR • May 1-4, 2011**



KIMBERLY KVAAL

In April 2004, I received a phone call from Keith Foster, then chair of WACUBO’s professional development committee (PDC) whom I had never met nor heard of. He was calling to gauge my interest in serving on the committee. He didn’t know who had recommended me and to this day, I still do not know. None the less, my name had landed on his desk and he was

looking for new members to join the PDC. I inquired as to the time commitment and responsibilities of the committee. Keith explained it was roughly an hour a month for a phone conference, a face-to-face planning meeting once a year, and sponsorship of one workshop annually. He encouraged me to consider joining the committee. I had never participated in a WACUBO event and if I was to serve on one of their committees, I reasoned that I should at least attend one. The fact that the next event was the Annual Meeting in Maui was surely providence. After discussing it with my Vice President, I said “Yes!”

Did you catch that? I said the year was 2004. That was six years ago and I am still involved with the PDC and still loving it. I am currently the co-chair of the committee and also serve as faculty for various workshops. When I said yes to Keith, I had no idea what was in store for me! I was able to give WACUBO my time and organization skills and I was given the opportunity to grow professionally and personally. I have had the opportunity to meet and work with tremendous individuals throughout our region at workshops and on the committee. I have made deep and lasting friendships through this experience. Moreover, my campus has benefited from my volunteerism. I have brought new ideas and broader knowledge back to campus. My personal network of has expanded, allowing me to ask questions and learn from others’ experiences. There is no doubt that the ROI of my time to WACUBO has paid off in huge dividends.

Developing an Effective Business Services Team

BY DR. JACALYN ASKIN, PARADISE VALLEY COMMUNITY COLLEGE

The professional literature is replete with “how to” books on team development and management. However, a key dimension, team environment, does not always get much attention. Given the unique attributes of higher education, a successful team and team leader must understand this environment and how it can impact team development and effectiveness.

As E. M. Marshall (Transforming the Way We Work: The Power of the Collaborative Workplace, 1995) noted, “Seventy percent of all our problems in business are people-related or culturally based. . . Our [organizational] cultures reflect the core values and beliefs that drive our actions and behaviors and influence our relationships, both internally and with our customers. . . Our job is to engage that culture so that its best values emerge and flourish.” Consequently, the first step to positive engagement with our campus culture is to understand its unique attributes. The second is understanding our interdependence with not only the college or university as a whole, but with other formal and informal groups and individuals within it.

Since many of our team members, come from the private or business sector, the world of higher education can appear very confusing. The academic environment is characterized by individualism in roles, goals and rewards, by ambiguity, by unique disciplinary cultures, by managers without management expertise or training and by two social roles that have been characterized as “locals” and “cosmopolitans.”

When Gouldner (“Cosmopolitans and Locals: Toward an Analysis of Latent Social Roles, II,” Administrative Science Quarterly, March 1958). coined the “locals” and “cosmopolitans” terms, he was attempting to differentiate between two types of faculty. “Locals” are identified by their focus on and loyalty to the institution. In contrast, “cosmopolitans” focus on their discipline and seek reward via accomplishment and distinction in their professions. However, the roles are equally applicable today to differentiate between staff who are frequently “locals” and faculty who may, more often, be “cosmopolitans.” Faculty cosmopolitan behavior, evident and heavily reinforced through research-focused evaluations at many four-year institutions, may be less evident at community colleges. However, the characteristics of independence from administration and desire for increased faculty control are typical of many community college faculty as well.

In addition, these social roles may also serve to distinguish staff groups or individuals. Do you have employees or groups who actively seek out professional development opportunities outside your organization, who pursue advanced degrees, and who are engaged in professional societies such as WACUBO and NACUBO? These are your “cosmopolitan” colleagues. On the

other hand, you probably also have colleagues whose professional community and job knowledge is limited to that of the college where they work? These are your “locals.”

Given these environmental characteristics, our challenge as managers is to create a team in an individualistic environment, and to develop consistent processes and systems in an ambiguous place while meeting the wants and needs of “locals” and “cosmopolitans.”

Negotiating these cultural divides occurs in two steps. First, in the orientation step, managers need to define the areas of difference and then, present these difference as shared problems to be solved together. Second, consider the culture of the business office, learn nuances and language of “business” and research the literature on organizational culture. Much has been written about academic and professional cultures. Likewise, consider the cultures represented on campus and in the units that the business office services. Watch and listen to faculty and staff in those units. What values and beliefs do they articulate in their words and actions? What are the real meanings of the words?

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For example, both nursing and accounting discuss the need for “high standards” of behavior. To nurses, the meaning is associated with social justice and protecting others. In accounting, the term refers to obeying organizational policies and providing equitable treatment. Although using a common term, these two fields implement it quite differently.

Failure to understand organizational context hinders one’s ability to work effectively across an institution. However, once key attributes of the various interacting and overlapping cultures are known, commonalities and differences can be identified. Recognition of the commonalities and respect for the differences and the reasons for them will become the cornerstone to adoption of a problem solving approach. By avoiding imposition of one’s own values or defaulting to the assumption that these values are superior, problems and issues can be addressed corroboratively. Rather than creating an environment rife for noncompliance or client dissatisfaction, we can, create shared goals and joint strategies for attainment. By negotiating the cultural divides within our environment, we become more effective teams and more significant contributors to our institution’s success.

Process Improvement Essential to Success

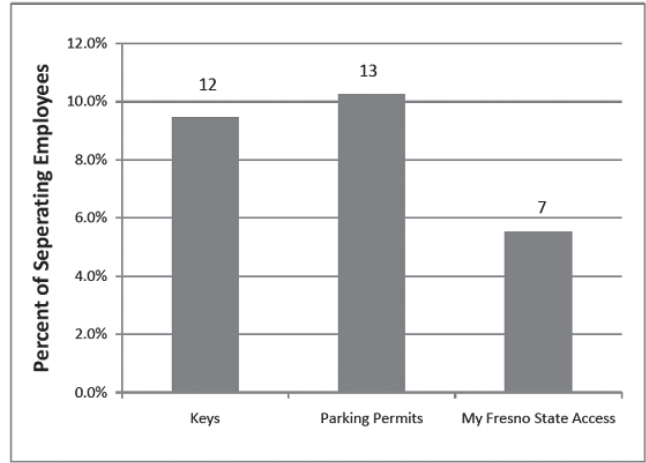
By TOM GAFFERY, CALIFORNIA STATE UNIVERSITY, FRESNO

“Doing the same with less.” In these difficult times, everyone can relate to this statement. At Fresno State, we enlisted a consultant to assist in redesigning some business processes. The goal of this initiative was to streamline processes in order to achieve a time savings so that staff could devote more time to other duties. Our consultant, International Management Technologies, www.imtc3.com, supplied a framework for action and tools for process redesign. Work work teams were developed to address a specific business process. At the end of the team’s work, all members are now skilled enough in process improvement tools that they can now lead the next series of business process improvement initiatives.

The university targeted four processes within human resources, academic personnel and payroll. Each process improvement project was overseen by a sponsor. This sponsor, a senior administrator, guided the team’s work, but was not involved in the day-to-day steps of the improvement project. These processes interacted with many campus departments. These processes were characterized by high rates of confusion, error, duplication or avoidance. Improvement teams went through a week of intensive training in the summer 2009 before kicking off their projects at the beginning of the fall semester.

I led a team that reviewed the university’s employee separation process. This process occurs when an employee separates from the university and is a method to return property and access.

The first, and most important, step is to identify starting assumptions and use them to frame the desired outcomes of the project. These outcomes become the design criteria for the new process.



Second, data is collected. In a process redesign, it is essential to question all starting assumptions. Ask “why.” Ask it a lot. You will soon find, in the words of Robert Kriegel, *Sacred Cows Make the Best Burgers*. Much of the data we found disproved campus urban legends. Data collection helped the team to understand how the current process worked and made it possible to identify the areas that were broken. The data yielded some exciting results regarding the number of employees who did not go through the employee

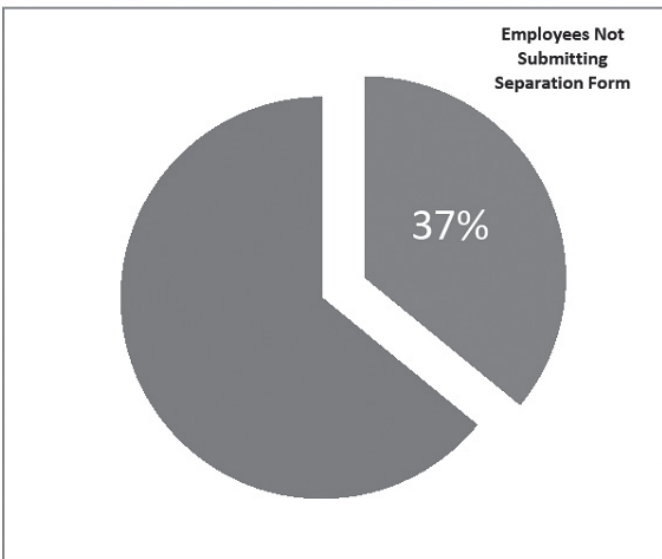
“ **Much of the data we found disproved campus urban legends.** ”

separation process. In addition, a number of employees went through the process, yet were still issued property and access after separation.

Third, the the team analyzed the “voice of the customer.” This is done through surveys and focus groups. Our project team was excited to find that much of the feedback received from customers aligned with the team’s starting assumptions. Further, the desires of customers also aligned with the team’s desires for the new product.

Fourth, the team undertook the most exciting part of the project: product design. In this phase, the project team used their data collected and customer feedback that met the desired outcomes. The new business process will result in increased accuracy and a dramatic time savings.

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WESTERN ASSOCIATION OF COLLEGE AND UNIVERSITY BUSINESS OFFICERS

PROFESSIONAL DEVELOPMENT CALENDAR

May 2-5, 2010	WACUBO Annual Meeting	Anaheim, CA
August 1-5, 2010	Business Management Institute	Santa Barbara, CA
August 7-12, 2010	Executive Leadership and Management Institute	Los Angeles, CA
Potential 2010-11 Topic	Beginning & Intermediate Accounting	TBD
Potential 2010-11 Topic	Treasury Management	TBD
Potential 2010-11 Topic	Strategic Budgeting	TBD
Potential 2010-11 Topic	Project Management & Leadership	TBD
Potential 2010-11 Topic	Process Mapping	TBD
Potential 2010-11 Topic	Academic & Unit Business Officers	TBD

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