



Hau'oli Makahiki Hou (Happy New Year),

MICHAEL UNEBASAMI, WACUBO PRESIDENT

I hope you all had a restful and happy holiday season. The beginning of a New Year always brings with it a great sense of optimism — another chance to make things better, another fresh start. I know that many of us mark this occasion by setting new resolutions whether it might be to lose some weight, spend more time with family, or refresh skills in one's profession. Whatever the goals you might set for yourself, I know there is a certain amount of time also spent reflecting on the past year.



As I look back on 2007, I recognize that much of the success of WACUBO is due to the hard work and commitment of the board members, committees and volunteers of this great organization. In addition to their professional responsibilities at their institutions, they spent countless hours to plan and coordinate all the professional development programs offered through WACUBO, including the well-attended Business Management Institute in Santa Barbara, the Executive Leadership & Management Institute at Stanford University, and the just completed Winter Management and Leadership Institute in Tucson, Arizona.

For those of you who attended these institutes and workshops in 2007, I ask that you please share your experiences with your friends and colleagues and encourage them to participate in 2008. In a time of economic uncertainty, professional development is the first step in improving the quality and organizational health of your institution. As you are well aware, economic signs are pointing toward a recessionary period and many state governments are clamping down on spending in anticipation of lower revenues. This all translates to less money being earmarked for higher education.

But I do not feel discouraged at all. In fact, I feel a sense of great optimism and hope as I look to the future of WACUBO in 2008. As an all-volunteer organization, we at WACUBO are doing our best to serve your professional development needs. Below is just a snippet of what is in store for you in the future.

Just three months from now, we will be holding our 2008 Annual Meeting from May 4-7 in Phoenix, Arizona. With a theme of "Connecting Campus Cultures," this Annual Meeting will offer great insight into building a more inclusive and effective organization as we advance our institutions. The Program Committee, led by 2nd Vice President Dennis Klaus, has put together a dynamic group of speakers to present topics that resonate the need to build and sustain relationships, especially now, during this time of economic uncertainty. Please visit us at www.wacubo.org for annual meeting program and registration information.

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LETTER FROM THE PRESIDENT (CONT'D)

In addition, our Professional Development Committee, under the inspirational leadership of Dan Morris, continues to plan and deliver quality workshops and programs throughout the year. You can find a list of the workshops at our website.

Also, the Institutes Committee, under the outstanding leadership of Past President Stan Nosek, is working diligently to enhance and expand its offerings at the Summer and Winter Institutes this year.

These, and many more opportunities are being planned for 2008, and I hope you will make time to join us at one or more of these events.

As a closing note, I just want to share another Hawaiian word that might come in handy when you need to rally the troops in times of significant challenges. We use the term, "imua" (ee-moo-ah), which means stand steadfast, advance forward, don't give up. It's a rallying cry I shouted at the Sugar Bowl, as I tried to encourage my University of Hawaii football team to persevere and fight on, in spite of the overwhelming odds presented by the Georgia Bulldogs. Well, you know the end to that story. We not only lost the game, but we also lost our outstand-

ing coach June Jones to Southern Methodist University. "Auwe" (ow-way) — Alas!

Despite these series of unfortunate events, something very uplifting has occurred. Hawaii's citizens, State legislators and business leaders have rallied around the University unlike anything I've seen in all my years here at the University of Hawaii. No one wants the momentum of our undefeated championship season to fade. The University has received an outpouring of financial support from the public sector to private businesses and donors. We have become the focus of the 2008 legislative session, which couldn't have come at a better time.

So remember, whenever or however bad things might get, there's always something better on the horizon worth fighting for.

I hope you and your institutions enjoy a prosperous 2008!

Aloha,

Michael Unebasami, WACUBO President
mune@hawaii.edu

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 CongdonD@email.laccd.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 2007 by the Western Association of College and University Business Officers, unless otherwise indicated.

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CHANGE OF ADDRESS

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

WACUBO Sponsors New Pacific Rim Seminars

WACUBO is delighted to announce the inaugural Pacific Rim Seminar, which will be offered in Honolulu in March. President Mike Unebasami has stressed the need for training for members from Hawai'i and the Pacific Rim. The cost of traveling to the mainland for workshops is often prohibitive; by holding programs in Hawai'i, many more members can be served.

We will offer two identical programs, one on March 24-25, and the second on March 27-28 to maximize opportunities to attend. With two programs offered, the smaller groups will enable participants to interact and get to know their colleagues. Besides the technical and management training offered, a goal of WACUBO professional development is to facilitate development of professional friendships and networks to assist members in sharing information, experiences, solutions and best practices.

The program is open to all, not just our Hawai'i and Pacific Rim colleagues. Participants will stay in the Royal Hawaiian Hotel, and transportation will be provided to Kapiolani Community College, where seminar sessions will be held. Kapiolani's Culinary Arts students will provide catering services; all who have partaken rave about the delicious food, lovely presentation and wonderful service.

The program will include general sessions and breakout sessions. General sessions include ethics, motivation, risk management — avoiding litigation landmines and humor in the workplace. Participants will have a choice of topics during four concurrent session periods, enabling customization of the workshop experience. Concurrent session topics include leadership, accounting, an entrepreneurial approach to auxiliary enterprises; dealing with difficult people, reducing risk in employee terminations, facilities management, sustainability, strategic budgeting, EEO issues, internal controls, power and influence, working with multiple generations and performance measurement.

Watch the website for further details and program updates. To register, visit www.wacubo.org. We look forward to seeing you in March!

Nominate a Deserving Colleague for a NACUBO Award

Recently, NACUBO sent members an email reminder to nominate outstanding individuals for one of several award categories. As a member of the NACUBO Awards Committee, Sally Roush stated that she would like to encourage each of you to consider nominating a colleague to receive recognition for his or her contributions, excellence and/or potential. The six NACUBO individual awards, which include overall outstanding contributions, good practice in endowment and investment management, commitment to the advancement of college and university accounting, professional development contributions, commitment to tax advocacy and tax compliance, and potential to advance to an executive position in higher education, provide an opportunity to nominate a wide variety of

individuals in our field. There is also an award for institutional excellence.

Business officers can best appreciate and identify excellence in fellow and sister business officers, thus these awards represent the highest kind of praise -- recognition from peers. Please take a moment to think about someone you think deserving of an award, and then go to the NACUBO website <http://www.nacubo.org>. Click on Membership and Community, then NACUBO Awards. There you'll find the nomination forms and a description of each award along with past recipients. Nominations are due by April 11, 2008. It would be wonderful to have WACUBO well represented in the group of nominees and awardees for 2008!



WACUBO 2008 Annual Meeting Connecting Campus Cultures

On behalf of the Program Committee, it is my sincere pleasure to invite you to the 70th Annual Meeting of the Western Association of College and University Business Officers (WACUBO). Our theme this year is "Connecting Campus Cultures" and I am confident that by the end of this year's conference you will return to your campuses rejuvenated and invigorated by new ideas, insights, and fresh perspectives, along with a renewed appreciation of how, as business officers, we carry out our educational mission and function as an integral component of connecting campus cultures in a time of rapidly changing paradigms.

This year's meeting site, at the beautiful and enchanting Wild Horse Pass Resort just south of Phoenix on the Gila River Indian Community, is the perfect place to relax and recharge as you connect with innovative ideas and colleagues. With this in mind, the Program Committee has worked diligently to put together a very unique, educational, inspirational, and thought-provoking program. Honored keynote speakers include: Wilma Mankiller, first woman Principal Chief of the Cherokee Nation and recipient of 18 honorary doctorates as well as the Presidential Medal of Freedom; Dr. Carl Hammerschlag, inspirational and internationally renowned author, educator, holistic healer and psychiatrist; Greg Bell, organizational relationship and communications expert; and Dr. Laree Kiely, President of the Kiely Group – Organizational Effectiveness Consultants. We are also thrilled to welcome Dr. Michael M. Crow, President of Arizona State University, and Dr. David McClain, University of Hawaii System President, as General Session presenters.

To further enrich and complement the keynote and general session speakers, sixteen concurrent sessions are offered including the always popular "Tales from the Front" presented by our own WACUBO members. In response to our

membership, a wide variety of additional sessions focus on relevant and current college and university topics allowing you to choose those sessions that best match your interests and institutional needs. Session topics include: Sustainability, Responding to Campus Violence, Emotional Intelligence, Immigration Issues, Customer Service, Accounting and Auditing Standards, Leadership, Ethics, Legal Issues and IT Security and Disaster Recovery.

This year's annual meeting holds the promise of exciting new perspectives, insights, networking, relaxation, and exposure to valuable professional information and opportunities for connecting the many cultures of your campus. I am confident that you will find this year's program enjoyable, helpful, and beneficial and I cannot think of a better time and place to gather than springtime in the Arizona desert.

Welcome to the beautiful southwest and culturally rich Phoenix! I look forward to seeing you at the scenic Wild Horse Pass Resort.

Warm regards,
Dennis Klaus
Salt Lake Community College
Program Committee Chair



PHOTOS COURTESY OF WILD HORSE PASS RESORT

Tales From the Front

Four Diverse Sessions

The Professional Development Committee (PDC) has chosen four informative and highly-spirited “Tales from the Front” proposals to be presented at the WACUBO Annual Meeting in Phoenix, Arizona. Dan Morris, the PDC Chair noted that “with such a wealth of experience in our membership, the Tales From The Front sessions offer a diverse range of experiences from which we can all learn. We think this year’s selections demonstrate a wonderful level of accomplishment that should prove to be both educational and entertaining.”

The selections include:

Kuali Financial System, Research Administration and Rice – An Open Source Collaboration at the University Of Arizona

PRESENTED BY: Charles Ingram, Assistant Vice President, Financial Services; Michele Norin, Chief Information Officer; and Lori Schultz, Assistant Director, Sponsored Projects.

SESSION SUMMARY: The University of Arizona (UA) is a founding partner in the Kuali Foundation, a non-profit organization responsible for sustaining and evolving a comprehensive suite of administrative software that meets the needs of all Carnegie Class institutions, directly contributing both functionally and technically to the development of the Kuali Financial Systems (KFS); Kuali Research Administration (KRA); and Kuali Rice (Technical Infrastructure). This session will present the concepts and drivers behind the creation of this open source collaboration project by the founding partner schools. Discuss why the University of Arizona got involved and what we expect from the project, present the current status of the project, and talk about the University of Arizona campus cultures that have been connected through this project — Financial Services, Sponsored Projects and Information Technology Services.

Moving From Tradition, To Transition, And On To Transformation

PRESENTED BY: Bill Ray, Assistant Vice President for Finance and Administration, Pacific University, Oregon; and Darlene Morgan, Vice President for Finance and Administration, Pacific University, Oregon.

SESSION SUMMARY: This session will give an overview of how one small university did a complete turnaround. It went from over a decade of stagnant growth, tight budgets, and no new facilities to constructing five new buildings, a major athletic complex in partnership with the City, starting two new schools and a new campus, achieving record enrollment growth, nearly doubling the endowment, all in less than 5 years. You are invited to hear and see the tools and methods used to achieve so much success in such a short amount of time.

Emergency Response: Lessons Learned

PANELISTS: Lauren Cosentino, Assistant Vice President Human Resources, Insurance & Risk, Pepperdine University; Keith Foster, Vice President for Administrative Services, Grays Harbor College; and Jack Beresford, Assistant Vice President of Marketing and Communications, San Diego State University.

SESSION SUMMARY: Natural and man-made disasters happen in an instant, and communication with students, faculty, staff and the community become critical: how would your campus respond? This panel discussion offers first-hand lessons learned during last year’s California fires and Oregon floods.

How To Succeed In Succession Planning

PRESENTED BY: Monica Boulay, Director of the WACUBO Business Management Institute; Dan Morris, Chairman of WACUBO’s Professional Development Committee; and William Pickens, Director of the WACUBO Executive Leadership and Management Institute.

SESSION SUMMARY: Due to demographics, a large number of positions vital to our campuses will become open during the next decade. This session will cover the basic principles and effective practices for a systematic approach to filling those positions with well qualified people through “succession planning.” We will discuss the best ways to identify the key characteristics for success in these positions, how mentoring and coaching can play an important role, and approaches to selecting and helping develop individuals. The session is designed for those who currently hold these positions and for those who seek them.

Information Exchange Program Adds Value to Annual Meeting



Time is flying as we head to WACUBO's 70th Annual Meeting in Phoenix, Arizona scheduled May 4-7, 2008. Phoenix, with its near-perfect weather, genuine hospitality and rich multi-cultural heritage is the ideal location for the Phoenix 2008 meeting where we will be Connecting Campus Cultures.

Early confirmations from exhibitors and sponsors promise a rich opportunity to learn about the programs and services offered by our Information Exchange partners. The companies listed below have made commitments. The broad spectrum of the higher education marketplace represented means something of interest for everyone.

Sponsorships also enrich annual meeting programs and pastimes. WACUBO's golf enthusiasts are invited to spend Sunday morning at the Whirlwind Golf Club for the traditional WACUBO Golf Tournament, sponsored again this year by Bank of America. The 7,017 yard, par 72 course features gradual elevation changes and great bunker designs with multi-tiered greens sure to impress and challenge WACUBO golfers of all skill levels. Another Sunday morning event being offered is a Fitness/Fun Walk on the resort grounds which are inspired by the art and legends of the Pima and Maricopa tribes and includes a replica of the Gila River.

After your morning activities, we invite you to the opening of the Information Exchange Exhibits program. Treats and prizes will add to your enjoyment of an early look at the latest offerings of WACUBO's business partner exhibitors.

Sunday's official start of the WACUBO Annual Meeting is our Opening Roundup at Rawhide Western Town. Scott Deaton and Follett Higher Education Group continue the platinum level sponsorship of this signature event. Join both old friends and new acquaintances for dinner and music in this unique Old West setting. Experience an authentic replica of an 1880's frontier town with cowboys, gunfights, stage-coach rides, shops and Western attractions.

Other special, yet traditional events include Monday's Wine and Cheese Reception, sponsored by TIAA-CREF and that evening's Suites in the Suite, sponsored by Follett Higher Education Group. Tuesday night we will celebrate another successful meeting with the Annual Banquet, preceded by an elegant Dinner Reception sponsored by George K. Baum and Company.

The Sheraton Wild Horse Pass & Resort, your conference hotel, is a destination resort located in the Sonora Desert on an expanse of rugged Arizona landscape, home and tribute to the Gila River Indian Communities' heritage and culture. You may choose to extend your stay to enjoy the easy-to-find recreation — from jogging and hiking trails, horseback riding, world-class golf, and tennis to a wide variety of water sports. Make your plans today to be a part of Phoenix 2008.

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PHOTO COURTESY OF GREATER PHOENIX CONVENTION & VISITORS BUREAU



PHOTO COURTESY OF WILD HORSE PASS RESORT

WACUBO Golf Tournament – a Southwest Experience

The 2008 WACUBO Golf Event, planned for Sunday morning, will be held at the luxury Cattail Course at the Whirlwind Golf Club on the resort property. Surrounded by the spectacular Sierra Estrella Mountains, this truly unique Southwest golf experience is designed to preserve the rich cultural heritage of the Gila River Indian Community. The 7,017-yard, par 72 course features gradual elevation changes and great bunker designs with multi-tiered greens and will impress and challenge golfers of all skill levels.

Transportation to the course will begin at 6:15 a.m. Breakfast and lunch are provided as part of the golf experience. To beat the heat, we will have a shotgun start at 7:00 a.m.

The cost will be \$125 per person for institutional members and \$175 per person for vendors and guests. Fees include green fees, cart, continental breakfast, lunch, hole competitions, and prizes. Club rentals must be reserved in advance: the cost is \$45.



PHOTO COURTESY OF WILD HORSE PASS RESORT

INFORMATION EXCHANGE... (CONT'D)

Business Partner Participants

AIG VALIC	Bon Appétit	George K. Baum & Co.	TAC
Allen & O'Hara Development Co., LLC	Capstone Development Western Division	Grant Thornton LLP	TIAA – CREF
Alliant Insurance Services, Inc.	Chartwells Educational Dining Services	Johnson Controls	Touchnet Information Systems, Inc
ARAMARK Campus Services	Commonfund	Lehman Brothers	UniversityLease
Bank of America	eThority	Moss Adams LLP	Vicenti, Lloyd & Stutzman LLP
Barnes & Noble College Booksellers	Follett Higher Education Group	Sightlines, LLC	
		Sodexho Campus Services	
		SunGard Higher Education	



WACUBO Business Management Institute to be held August 3-8, 2008

WACUBO is pleased to invite you to attend the 52nd WACUBO Business Management Institute (BMI) on August 3-8, 2008 at the lovely oceanside campus of the University of California, Santa Barbara.

We expect about 300 higher education managers, supervisors, academic officers, staff and other mid-level personnel who perform administrative and business functions for the institution to attend. Anyone new to higher education will benefit from the learning and networking opportunities. Those who manage the business affairs in an academic department will gain new knowledge and find an advantage in meeting others who perform similar duties.

The Institute's four-year progressive curriculum offers an opportunity for mid-level professionals to enhance technical skills, expand and improve management practices, hear updates on the important issues that affect your daily professional life and future, and meet new colleagues. Evening special events provide fun, relaxation and a chance to get to know your colleagues.

In Years One and Two participants take core courses in the morning and choose from a broad array of electives in the afternoon. You can customize your professional development by choosing a variety of topics, or design a track specific to your area of interest or responsibility.

Sandra Lier, retired associate vice president at University of Washington, will serve as Year Three coordinator. The Business Management Institute Year 3 will feature topics highly useful to every higher education administrator: ethics, communications, becoming a knowledge worker, guidance on human resources problems in the workplace, and how to manage performance metrics. Year 3 also uses the case study method to introduce students to a wide range of typical problems, challenges and environmental conditions faced by college and university managers. Faculty in 2008 include David Frohnmayr, president of University of Oregon; Sandra Lier; Stacy Pearson, vice president at Boise State; Susan S. Clark, Unconventional Wisdom; Chris Christofferson, Stanford; Ruth Johnston, senior associate

treasurer and QI champion at University of Washington; and Allison Vaillancourt, associate vice president for human resources at University of Arizona.

Year Four focuses on emerging issues in higher education, leadership, change in business and institutional practices, strategic planning and performance measurement and hot topics. Mernoy Harrison, vice president and executive vice provost, Arizona State University Downtown Phoenix Campus, will return as Year Four coordinator. Faculty include Dave Frohnmayr; Jairy Hunter, Charleston Southern University; Ruth Johnston; Don Norris, Strategic Initiatives; and Beverly Ledbetter, vice president and general counsel of Brown University. Participants will explore the significant impact that campus change, technology and other issues have on all aspects of business functions and higher education administration. The program offers small group discussions, a panel of experts and vital topics in higher education.

Senior-level administrative officers and Institute graduates may attend the Continuous Learning program and then take other new courses from the four-year Institute curriculum or return to hear favorite faculty. Sean Joyce of Omega Consultants to Management will lead a "WACUBO MBA Bootcamp" which will explore human development and focus on developing personal success skills. Karen Hoefel, vice president for administrative services at Los Angeles Mission College, will continue as Continuous Learning coordinator.

Reflect and rejuvenate at the BMI this summer. Spend a moment thinking about a sunny, warm, beachside environment and plan to join us in August. For information contact Monica M. Boulay, Institute Director, at EduSpeak@aol.com or 520-298-8680.

WACUBO Executive Leadership and Management Institute: August 1-8, 2008

WACUBO is pleased to announce that the 2008 Executive Leadership Institute is now open for applications. The Institute's mission is to offer the nation's best "total immersion" experience in leadership education, which is designed to increase the skills essential to success in higher education administration.

The sessions are organized around situations which, over the long run, will make or break the careers of leaders in higher education. Its goals are:

Increasing the self-awareness of administrators as leaders. A major goal is to help participants see themselves as others do, and to understand the different and strategic roles necessary to be successful in a higher education environment.

Improving skills in strategic thinking and effective action. The Institute is designed to develop habits of setting realistic goals, solving problems early, communicating clearly, anticipating the responses of others, dealing successfully with conflict, enhancing team building skills, staying flexible, being resilient, and evaluating progress honestly — all while appreciating the importance of a work/personal life balance.

Establishing an enduring network for support and commitment to continuing professional development. The Institute is a powerful and intense experience that forges professional relationships with peers and mentors who can later provide career advice, information about solving campus problems, personal support, and connections with other institutions.

Who is this Institute intended for? Individuals come from a wide diversity of institutions and professional positions who share common purposes. Institutionally, participants come from small liberal arts colleges and medical schools; from community colleges and theological seminaries; from system offices and major research universities. However, all share high personal goals and are willing to work at practicing leadership skills and broadening their perspectives about higher education.

Specifically, the Institute is intended for:

Senior-level leaders, or those serving as staff to them, who seek to understand the larger environment of higher education in America and institutions different from their own.

Middle managers who must manage both "up" and "down" the campus ladder. They manage administrative units, implement the policies of senior leadership, and are responsible for explaining institutional goals.

Those new to higher education who come from staff positions or from leadership roles outside academia, but who want to better understand the culture and decision-making process within their institution.

Faculty members who currently serve in administrative positions or would like to.

For 2008, the Executive Leadership Institute's classes will deal with challenging and problematic situations, where success requires practiced skill and unwavering attention to positive results. The "core" classes will be:

- The Now and Future "Big Picture" of American Higher Education
- The Culture of the Campus
- Anticipating and Managing Crises
- Leadership and Academic Culture
- Managing Conflict and Difficult People
- The Trials and Tribulations of Committee Leadership
- Personal Style and Effective Public Speaking
- Challenges We All Face in Higher Education

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Professional Development Offerings for 2008

The Professional Development Committee has been busy preparing quality offerings for the spring. Dan Morris leads up a hard working group of dedicated and gifted volunteers, who deliver a variety of workshops for your selection.

March 13-14, 2008

An Accounting Series (Fundamental)

In March the popular Accounting Series will be presented in Albuquerque, NM. The Fundamental workshop is being held on Thursday and Friday, March 13 and 14th.

COST: WACUBO Member \$269
Non-Member \$299

CONTACT: Linda Pardo
lpardo@unm.edu

March 13-14, 2008

An Accounting Series (Intermediate)

In March the popular Accounting Series will be presented in Albuquerque, NM. The intermediate workshop is being held Thursday and Friday, March 13 and 14th.

COST: WACUBO Member \$269
Non-Member \$299

CONTACT: Linda Pardo
lpardo@unm.edu

Please note: these two accounting workshops are held simultaneously. You can attend one but not both!

April 23-24, 2008

An Academic/Unit Business Officers Program

This workshop will be held in Portland, OR. Participants who attend will gather strategies for success within their institutions. Several interesting topics will be discussed for both new and returning administration.

COST: WACUBO Member \$269
Non-Member \$299

CONTACT: Marti Ash
marti.ash@unlv.edu

April 2008

An Emergency Preparedness/Recovery

Los Angeles, CA will be the location for this workshop. Business officers will increase their awareness and knowledge on emergency planning and recovery; and, also learn how to meet federal mandates. Exact date has not yet been determined.

COST: WACUBO Member \$199
Non-Member \$219

CONTACT: Neil Markley
neil.markley@sonoma.edu

THE EXECUTIVE LEADERSHIP AND MANAGEMENT INSTITUTE (CONT'D)

- Career Planning from the Perspective of Leadership
- Balancing Work and Personal Life

The cost per participant is \$2,800. A \$100 discount is available for those from institutions which are members of WACUBO. The cost includes tuition, all instructional materials, a single residence hall room, and meals from lunch on Friday, August 1 through breakfast on August 8.

We welcome your application for 2008. To apply, please send an e-mail to whpickens@aol.com and include your name, position title, campus or agency, office address, telephone,

and e-mail address. Also, attach a description of responsibilities for your current position (a resume is fine if these are included) and the names of two individuals on campus who currently know you well. We will communicate with you within ten business days of your application. Thank you for considering the ELMI at Stanford.

Dr. William Pickens, Director, ELMI
4709 Mt. Gaywas Dr., San Diego, CA 92117
858-278-1764 (voice); 858-278-8781 (FAX)
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W A C U B O

Winter Management and Leadership Institute a Success in Tucson, AZ

The Second Annual WACUBO Winter Management and Leadership Institute (WMLI) was held in Tucson, AZ on January 18-22, 2008. Participants came from 14 states as well as Mexico and represented small and large, public and private, two-year and four-year institutions. Academic business officers, departmental administrative officers, vice presidents, controllers and many directors were among the participants. Attendance is limited to facilitate small group activities and networking.

Held at the Tucson University Marriott, we were fortunate to have tremendous support from the University of Arizona. We are especially grateful to Charles Ingram and Tyson Korhonen and their departments for their technology support.

Designed by WACUBO's Small Institutions Committee for those who have broad responsibilities and limited resources, the WMLI offers the same high quality, intensive experience as the Summer Institutes but at a more convenient time. Originally envisioned as a program for business officers, senior staff, directors and managers from small institutions who cannot get away in the summer but who seek an

Institute experience with higher education colleagues, the scope has expanded to include individuals from community colleges and academic departments in large institutions who have broad responsibilities and limited staff — for those who “wear many hats.”

Small Institutions Committee chair Curtis Ryan held a committee meeting before the Institute began, enabling committee members to meet many of the participants.

The WMLI began on Friday of Martin Luther King weekend and concluded on Tuesday to minimize time away from the office. Sessions maximized group interaction and networking opportunities, offering timely topics, nationally known faculty, and valuable time to discuss management and leadership challenges with colleagues.

The WACUBO Board has approved a three-year pilot of the WMLI. Watch the website at www.wacubo.org for details on the third program and plan to join us next January. Contact Monica Boulay at 520-298-8680 or EduSpeak@aol.com for information.

Highlights of Sessions

In the keynote, vice president and executive vice provost Mernoy E. Harrison Jr. of Arizona State University Downtown Phoenix Campus delivered an excellent overview of the **top ten challenges facing higher education** in the U.S. In small groups, participants selected one of the topics and brainstormed contributing factors and possible solutions.

Jairy Hunter, president of Charleston Southern University, presented sessions on **leadership and campus culture** and led a day of strategic planning in which participants broke into teams and created a strategic plan and presented it to the full group.

An overview of **higher education law and legal issues** was delivered by vice president and general counsel Beverly Ledbetter of Brown University.

Sean Joyce of Omega Consultants to Management led lively sessions related to **creative problem solving, communication techniques, managing conflict, and difficult people**.

Stacy Pearson, vice president for finance and administration at Boise State University presented **internal controls and ethical issues**.

The issue of **sustainability and how to fund green buildings** was covered by Jan McAdams of The McAdams Group.

Jeanne DeMatteo and Peter Michell, both of St. Mary's College of California presented **Capital Financing Issues and Challenges for Small Institutions**, along with Andrew McKendrick and Roan Blacker of Public Financial Management.

An **endowment management** session was presented by comptroller Mark McGurk and investment officer Patrick O'Connor from the University of Arizona.

Rick Schlegel from United Educators discussed **risk management**, specifically how to avoid the “litigation landmines” in employment law.

Karen Angell from Virchow, Krause & Company led a discussion on the **best practices and tools in financial risk assessment, and when to use them**. She reviewed new accounting changes and using ratios in benchmarking and analysis.

Allison Vaillancourt, associate vice president for human resources at the University of Arizona began the final day with “**Goodbye, Going With Your Gut: So Long, Rock, Paper, Scissors.**” She spoke about making difficult decisions, giving techniques to avoid costly paralysis and the resulting missed opportunities.

Janina Latack, career consultant and effectiveness coach, presented a session on **coaching and mentoring**, stressing the importance of an ongoing relationship built to turn potential into performance and the development of people.



WACUBO Calendar

WINTER ISSUE 2008

March 13-14, 2008	WACUBO Professional Development – Fundamental College and University Accounting	Albuquerque, NM
March 13-14, 2008	WACUBO Professional Development – Intermediate College and University Accounting	Albuquerque, NM
March 24-25, 2008	WACUBO Pacific Rim Seminar	Honolulu, HI
March 27-28, 2008	WACUBO Pacific Rim Seminar (repeat)	Honolulu, HI
April 23-24, 2008	WACUBO Professional Development – Academic and Unit Business Officers Program	Portland, Oregon
April 2008 *	WACUBO Professional Development – Emergency Preparedness and Recovery	Los Angeles, CA
May 4-7, 2008	WACUBO Annual Meeting	Phoenix AZ
July 12-15, 2008	NACUBO Annual Meeting	Chicago, IL
August 1-8, 2008	WACUBO Executive Leadership & Management Institute	Stanford University
August 3-8, 2008	WACUBO Business Management Institute	Santa Barbara, CA

WACUBO

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