



Take advantage of WACUBO opportunities

October, 2002
Issue 38

By Sandra Lier

Last July, NACUBO held its annual meeting in the beautiful city of Vancouver, British Columbia, Canada. The location couldn't have been more exciting -- a cosmopolitan city with a variety of sights to see and cultures to inhale.

The meeting featured nationally known speakers such as Robert Reich, economist and former Secretary of Labor;

Doris Kearns Goodwin, author and historian; and Bernard Kerik, NY Police Commissioner, who was on-site moments after the Twin Towers of the World Trade Center were struck. Each speaker was outstanding, bringing new perspectives to our understanding of world affairs and our responses to threats of war or violence. Goodwin was particularly interesting as she offered personal insights into the

personalities and thinking of the leaders who have shaped our nation.

The breakout sessions addressed the critical knowledge sets and professional competencies needed for higher education leaders today. Topics such as strategies for budget cuts, tuition and financial aid, investment planning, change

management, and emergency planning were just a few of the issues presented. A particularly effective change in the session format on one of the days grouped each Carnegie classification institution into separate tracks. Community colleges, small institutions, comprehensive colleges and universities, and research universities had the opportunity to learn and discuss issues relevant to their particular environment.

WACUBO's Treasurer, Joanne Coville, served on the NACUBO Host Committee. Thanks for a terrific meeting, Joanne!

Professional Development

I visited WACUBO's Santa Barbara Institute at UC Santa Barbara and had a great time visiting attendees. What a dedicated group of people. Thanks to the faculty, who generously offered their expertise and opinions on education and leadership. Additional thanks go to our intrepid Director, Monica Boulay, of EduSpeak. Without her at the helm, the Institute would wobble in the wind.

I attended the first day of WACUBO's Executive Leadership and Management Institute held at Stanford. I enjoyed returning to my alma mater to meet the interesting and talented enrollees of this year's program. Thanks to Bill and Monica Pickens who provided a wonderful and welcoming environment for all. Superb faculty. . . and great experience!

WACUBO's Professional Development Committee has been hard at work preparing both new and continued offerings that will benefit your career. In this issue, you'll find complete details on courses in Higher Education Accounting, Emergency Preparedness, Treasury Management, and Change Management.

While on the subject of Change Management, this issue introduces a new column on the subject by our own expert, Jeff Marsee. Jeff has been a regular participant at the Santa Barbara Institute. Jeff has extensive higher educational experience. He served as Vice Chancellor of Administrative and Academic Affairs at Ventura County Community College District, and has more than seventeen years of experience as CFO at several small and large (\$100+ million) enterprises. Jeff Marsee and Associates, is a consulting firm that specializes in assisting profit and nonprofit organizations successfully complete process transformations. In each upcoming issue, Jeff will discuss aspects of implementing change within your institution, and respond to questions from our readers.

2003 Annual Meeting

Next year's annual meeting is going to be held earlier in the year than usual, so note the date on your calendars. We'll be enjoying the Canadian Rockies from April 20 through 23, at the Fairmont Banff Springs Hotel in Banff, Alberta, Canada. The early date will enable us to afford one of the truly historic hotel sites in the world. The Hotel was originally built in 1888 as a railway hotel to accommodate adventurous travelers. Today this majestic hotel



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President's Message

Take advantage of WACUBO opportunities (from page 1)

stands in the middle of some of the most spectacular scenery that you will see and offers wonderful service. The monetary exchange rate will also make this conference most affordable to our membership.

Please note that April 20 is Easter. We will have the exciting opportunity to attend the Banff Springs Hotel's locally renown Easter Brunch. The Hotel concierge will be able to inform you about times and locations for church services.

The Host Committee chair is Alan Chambers from the University of Calgary, and the Program Committee chair is Sally Roush from San Diego State University. Members from the USA and Canada have already begun working on the conference program. Be sure to keep an eye on WACUBO's website for many updates during the planning for this exciting event.

Even in this time of budget constraints, it's important to take care of you and your staff's education and development needs. WACUBO's

mission is to promote and maintain professional standards and conduct for institutional, administrative, and financial effectiveness. WACUBO strives to offer you a variety of opportunities to learn more about issues facing the profession and solutions to common problems. The 2003 Annual Meeting in Banff will be a terrific opportunity to enjoy a beautiful, affordable location while adding to your professional effectiveness.

See you soon!

Congratulations

to WACUBO
Membership Chair
Victor Pacheco, of
the University of Texas
at El Paso.

He received his Ph.D. in
August, 2002!
Well done Victor!



WACUBO NEWSLETTER

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 presenting the viewpoint of one particular vendor. A byline including the author's name, position and institution will be included. Articles should be brief (500-750 words).

Career Announcements: Career announcements are accepted on an "as-room-permits" basis and are included as publication room permits. Photos may be included, but inclusion with announcement is not guaranteed.

Submit all articles in the body of an e-mail message, or as a text document attachment to an e-mail message addressed to raclemmo@uci.edu.

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Changes of address: send all address changes to Gregg Goldman at ggoldman@uci.edu

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Ten Steps for Implementing Change

Step One: Align Leadership Style With Organizational Culture

By Jeff Marsee

This is the first in a series of articles about ten key steps that college leaders should consider when implementing organizational change. Utilizing Jeff Marsee's article, Ten Steps for Implementing Change, published in the June, 2002 issue of the NACUBO Business Officer, the author will present key concepts about each change step in each future issue. Readers are encouraged to respond to Jeff Marsee, (jamarsee@aol.com) with questions or requests for suggestions about handling similar management issues at their college. Selected responses will be included in subsequent columns. Confidentiality will be respected when requested. By sharing experiences and responding to questions, the editorial staff believes that a unique learning by sharing tool will be initiated. We appreciate your participation and willingness to assist in this new innovative professional learning experience.

Jeff Marsee, President of Jeff Marsee & Associates (www.jeffmarsee.com), is an independent management consultant who specializes in facilitating process transformations for college and nonprofit organizations. He has written extensively, and has successfully consulted as a change management facilitator to help leaders understand the importance of the human element in the organizational transformation process.

Implementing organizational change is a tremendous challenge. Failure rates of intended institutional change efforts are not encouraging:

- * Two independent studies in the early 1990's, one published by Arthur D. Little and one by McKinsey & Company, found that out of the hundreds of corporate Total Quality Management (TQM) programs studied, about two thirds grind to a halt because of their failure to produce hoped-for results.
- * Re-engineering has fared no better; a number of articles, including some by Re-engineering's founders (Hammer and Champy), place the failure rate somewhere around 70 percent.
- * Harvard's John Kotter, in a study of one hundred top management-driven "corporate transformation" efforts, concluded that more than half did not survive the initial phases.

"There is little to suggest that schools, healthcare institutions, governmental, and nonprofit institutions fare any better."¹

Many leaders don't understand that most organizations resist change. Employees create patterns of behavior to reduce stress and eliminate the unknown. Change creates uncertainty, stresses the culture, and alarms the culture keepers - those individuals who resist change at all costs. It is the leader's responsibility to reduce undue stress on the culture caused by change initiatives.

While it typically takes at least five to ten years to change a culture, such efforts are usually unsuccessful in the long-term. An organization's culture is usually reflective of the industry and cannot be easily changed to suit a leader's preferred style of operation. Therefore, successful leaders shift their decision making and change implementation style to correspond to the preferred change methodology of the organization. This allows the change process to work within the parameters of the organization's culture, i.e., the collective group's way of doing things.

For instance, a leader's orientation may be external-focused on market or customer needs - while the organization's culture may be primarily inward or tradition-oriented. A leader will face difficulty when attempting to realign an inward oriented organization to external issues and challenges. This difference in orientation (external versus internal) can result in a workforce that fails to support a change initiative. We see this occurring in colleges that have difficulty in altering processes that would benefit the student/customer (external).

These adjustments cause too many changes (processes/reporting responsibilities/working relationships) for the internally focused staff to absorb. The resistance is usually subtle, but effective in causing delay and eventual termination of the change effort. One approach to minimize culture conflict would be for the leader to develop an argument for improved operational efficiencies (internal), i.e., improved job satisfaction. By addressing internal needs and perceptions of improving operational efficiencies, the external benefits can also become residual beneficiaries.

Carly Fiorina, CEO of Hewlett-Packard, experienced another type of culture/leadership misalignment while leading a corporate merger with the Compaq Computer Company. Her perception of what was best for the organization and how to implement the necessary changes were in direct conflict with the famous "HP-Way." The corporate culture established by Bill Hewlett and David Packard was egalitarian and people oriented. In their world, a major merger would be attempted only after significant time had been spent with the employees, asking for their input and support. Ms. Fiorina took the lead on a merger initiative as a task that must be completed immediately to position Hewlett-Packard for the 21st Century. Adversaries attempted to discredit her by claiming she was preoccupied with her own professional stature and personal comforts, e.g., attacking "her" purchase of a corporate plane. The personalized attack on the HP leader reflected a conflict between a highly people oriented culture and a leadership style that was task oriented. The attack became focused on the leader's personality and style, not the issues of the merger. Despite a successful stock merger, the real challenge will be converting the organization to a new culture; HP-Compaq. The HP culture keepers can probably be counted upon to resist.

Leaders must learn to adapt the change process to the culture. It's easier for an organization to adapt to change if it is allowed to do so through the preferred methodology of its culture. Successful change leaders seem to be those persons whose decision and implementation style is concurrent with their organization's culture, or those persons who are versatile and can adapt to the preferred change methodology of their college.

1. (Senge, Peter M., The Dance of Change: The Challenges of Sustaining Momentum in Learning Organizations, Doubleday, 1999).



Information Exchange Program

Contacting our Business Partners

by Linda Stewart and
Susan Geiss

The Information Exchange Program at the Annual Meeting remains the cornerstone of WACUBO's business partner activities. The many business partners who exhibit and sponsor are always eager to share information and solutions with our membership to further the commitment to quality advances in higher education. The following letter outlines the opportunities for sponsors and exhibitors:

Dear Business Partner:

We have the pleasure of extending you an invitation to participate in the 2003 Annual Meeting of the Western Association of College and University Business Officers (WACUBO).

The 2003 meeting will take place from April 20 to 23 in Banff, Alberta, Canada at the renowned Fairmont Banff Springs Hotel, a luxury resort located in one of the most dramatic and awe-inspiring settings found anywhere. Eighty miles west of Calgary, Canada's *castle in the Rockies* offers state of the art conference accommodations and exquisite guest amenities in the grand European fashion. Located within one of Canada's premier parks, Banff presents you with many opportunities to explore — visit exquisite Lake Louise, experience the Columbia Icefields, relax in the mineral hot springs or schedule time for skiing – so, plan to extend your stay!



By exhibiting and sponsoring events at the WACUBO annual meeting, you will develop contacts with the higher education administrators who make and influence the business decisions on their campuses. These campuses encompass the western Canadian provinces, Mexico, and other areas around the Pacific Rim and, of course, the western United States. *You can expect to have an opportunity to meet more than 350 higher education administrators at each annual meeting.*

We encourage you to reserve space early for the 'Canadian Rockies' meeting. Brochures with information about sponsorship opportunities and exhibitor information will be available in early October 2002 by mail, or you can download a copy at that time from the WACUBO homepage <http://www.wacubo.org/brochure.html>.

We are excited about plans for next year's program and want to be sure you have the information you need to take advantage of the opportunity to join us in beautiful Banff National Park! Please do not hesitate to contact either of us if you would like additional information, or have questions regarding WACUBO's Business Partner program.

Sincerely,
Susan Geiss
Linda A. Stewart

geiss@usc.edu
lstewart@mail.sdsu.edu

As we plan for next year, we continue to look at new ways to connect WACUBO's membership with our business partners and their expertise. In exploring ways to do this, your comments are invaluable and contribute to the overall success of the annual meeting. If you have thoughts as to how the program might improve or know companies that partner with your institution and might like to exhibit or sponsor, please let us know. We sincerely hope you will join us next year in Banff!



Annual Meeting

24 things to know about our annual meeting in Banff, Alberta

Just to whet your appetite for things Canadian, we've compiled a few really useful facts for you to commit to memory.

1 The annual meeting will be held **April 20 through April 23, 2003**

2 Our meeting site, The **Fairmont Banff Springs Hotel**, was

built at the foot of Sulphur mountain in 1888 by railroad tycoon William Van Horne.

3 If you are a US citizen, you will need proof of citizenship to enter Canada. A passport is the best way; if you don't have one, start the process of obtaining one now, while you have plenty of time to get one!

4 One Canadian dollar equals about \$0.639775 US dollars, last time we checked.

5 Speaking of dollars, a Canadian dollar coin is called a "loonie," because of the picture of a loon on it. A two dollar coin is... yes, you guessed it. A "twonie." That's also because they're made of two different contrasting metals.



6 Local temperatures will be on the Celsius scale. All you have to remember is, $Tf = ((9/5)*Tc)+32$. That will yield the Fahrenheit temp. Now what could be simpler than that!

7 One other conversion: All road signs are in kilometers. Simply multiply the kilometers by 0.62 to get miles. Hmm. kind of the same conversion for money, isn't it?

8 In most cases, the GST tax you pay on your hotel bill and other significant articles is refundable to U.S. visitors. You can get a claim form at the airport.



9 **April 20 is Easter**, so make your plans accordingly. You may be interested to know that the Fairmont's Easter Brunch is an overwhelmingly popular one. Make your reservations

when you make your reservations, if you get my drift.

10 Mounties (the RCMP) don't always look "that way."



11 Banff is right in the middle of a Canadian National Forest (a small admission fee is required). Today Banff National Park covers an area of 6,641 square kilometers (see tip #7). Approximately 8 million people enter the park annually (an extra fact).

12 The "eh?" thing isn't really funny. Do be courteous, won't you?

13 Airlines serving Calgary International Airport (Banff's closest city) include Air BC, Air Canada, American Airlines, British Airways, Canadian Airlines, Delta Airlines, Horizon Air, JAL, Lufthansa, United Airlines, WestJet, Canada 3000, Royal, Air Transat, Continental Airlines, Martinair, Britannia, Airtours, Alaskan Airlines, Skyservice, Northwest, and SAS. Whew!

14 Back to the road signs. If you speak French, you're in luck, because the signs are bi-lingual.



15 You say "soda," Canadians say "pop." You say "Zee," they say "Zed." You say "drinking rum." Some Canadians say "seeing the Governor." OK, maybe you don't say that one very often.

16 There are 10 provinces: *Alberta (where Banff is), British Columbia, Manitoba, New Brunswick, Newfoundland, Saskatchewan, Nova Scotia, Ontario, Prince Edward Island, and Quebec.*

17 There are three additional territories: *Northwest Territories, Nunavut, and Yukon Territory.*

18 Canada's Prime Minister is *Jean Chrétien*. Remember that name. There may be a quiz.

19 In 1847 *Rev. Robert Terrill Rundle*, a Wesleyan Missionary, held services for the natives on the shores of Lake Minnewanka. Today, Rundle Mountain is just one of the many peaks surrounding Banff.

20 Elk and big horned sheep roam the streets. You might even see a moose or a bear. They are not tame. Keep your distance. Seriously. *These guys have been known to kill.*



That big ol' river running next to the Hotel? That's the **Bow River**. It received its name not for its curves, but from the bow reeds that grow along its banks.

22 Prepare for cold weather. I mean, really cold weather. Odds are there will be snow. Lotsa snow.

23 Banff began humbly as the Canadian Pacific Railroad's Siding 29; just a spur off the main line. Today, over 3 million people visit Banff per year.

24 If you haven't guessed already, this is going to be **one awesome place for a meeting**. Make your plans to attend now!

WACUBO Professional Development

WACUBO is working to provide training that will give your institution a management edge and your own career a boost. Act now to register for our fall class opportunities!

October 21, 2002

Crisis Management/Emergency Preparedness

Oakland, CA

Hotel: Oakland Airport Hilton

Cost: \$125

Information Contact: **Helen Tamai**

Site Coordinator: Barbara Piepho

Speakers:

Tom Schultheis, Chief of Police, Cal State San Marcos

Calvin Handy, Chief of Police at UC Davis,

Mike Chandler, Fire Chief, UC Davis.

General info on the class:

This one-day session explores the lessons learned from campuses where major disruptions caused by earthquakes, fires or major violence have forced campus-wide closures or immediate police action. It will also provide you with an opportunity to review and discuss a sample crisis management plan, and take the sample with you back to campus. This session is designed to help administrators prepare to manage the physical challenges posed by different kinds of emergencies, to establish effective communications with those on and off campus during the emergencies, to restore normal functioning as soon as possible, and to deal with the long-lasting psychological impact of such campus-stopping events.

October 28 - 29, 2002

Introductory College and University Accounting

[formerly Basic Fund Accounting]

Ontario, CA

Hotel: Hilton Ontario Airport Hotel

Cost: \$250

Site coordinator: Jennifer Stockton

Speakers:

Rick Allen - Director of Accounting and Financial Reporting - Utah State University

Jim Dunkelman - Director of Financial Services & Controller - The Claremont Colleges

General info on the class:

Formerly titled Basic Fund Accounting. This workshop will provide participants with an introduction to college and university accounting concepts and the basic format used by these institutions in their financial statements, for both public and private colleges and universities. A discussion of GASB 35 compliance will be included for public institutions. The workshop is targeted to 1st or 2nd year staff members fairly new to higher education accounting and finance positions, or seasoned veterans seeking a refresher course on the basics.

November 7, 2002

Introduction to Treasury Management

Las Vegas, NV

Hotel: Tuscany Hotel - rate \$79

Cost: \$150

Site Coordinator: Elizabeth Dickson

Speaker: Mark Krawczyk, Assistant Treasurer,
University of Michigan

General info on the class:

NEW OFFERING! This one-day workshop is designed to provide participants an understanding of the general practice of treasury management. The workshop is designed both for entry level treasury/financial management positions, and non-treasury management positions which interface with treasury, such as general accounting, bursar or financial aid office staff. By the end of the workshop, participants will have a broad overview of treasury and financial management and the resources involved in managing these processes. All registrants will receive a handout describing treasury management within higher education. **Note:** This is a joint presentation of the Treasury Institute for Higher Education and WACUBO.

The Professional Development Committee is continually working to provide training in areas that our members tell us is needed. Whatever the need is, we will find the experts and make that training happen. We want to hear from you. If you have ideas for future training courses, don't hesitate to contact us. We're working for you!

Suzanne Green

Professional Development Chair

Associate Vice President,

Finance and Business Services

California State University, San Marcos

333 South Twin Oaks Valley Rd.

San Marcos, CA 90296-0001

(760) 750-4450

FAX: (760) 750-3152

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December 6, 2002

Change Management

San Diego, CA

Hotel: San Diego Mission Valley Hilton,
901 Camino del Rio South,
San Diego, CA 92108.

Hotel rate: \$99/night single or double.

Cost: \$125.00

Site Coordinator: Andrea Peters, (619) 594-5937

Speaker: Ruth A Johnston,

Associate Treasurer for Quality and

Communication at the University of Washington

General info on the class:

NEW TOPIC! Leaders of change in higher education administration are facing new pressures, responsibilities and challenges. Leaders must embrace change themselves, while leading others in accepting the changes as beneficial and while maintaining productivity. Most leaders are expected to manage simultaneous change processes, including changes in leadership, technology, budgets and work processes. This presentation will help you to lead yourself and others through change, to understand what happens during change, to develop some personal coping tools, and to lead your staff. You will also identify ways to help ensure your participation in making these changes work for you. Participants are encouraged to identify changes they want to or are planning to make at their institutions. Part of the workshop will include fleshing out the aspects of your change, planning for effective implementation, and discussion. You will walk away with ideas to consider and actions to take. **Class time:** 8:30 am to 4:00 pm.

**register on-line
today at
www.wacubo.org**



Summer Institutes

EXECUTIVE LEADERSHIP AND MANAGEMENT INSTITUTE AT STANFORD

Sponsored by WACUBO
Held July 26 through August 3, 2002

This Institute is a “total immersion” experience designed to increase the skills and understandings essential to success in leadership and management positions in higher education. The total immersion format and a class limit of thirty-five allow everyone to get to know other participants and the faculty in ways that are not possible elsewhere. The format is rigorous, bombarding everyone with lots of ideas and breaking down barriers to honest exchanges.

The 2002 ELMI attracted a wide range of participants. Geographically, people came from several states and two other countries (Canada and the West Indies)—from states as far apart as Alaska, Minnesota, and North



The ELMI Class of 2002

Bottom Row, left to right: Melody Kessler, California State University (CSU) San Marcos; Claudette Weber, Foothill De-Anza Community College District; Brenda Helminen, Michigan Technological University; Rita Spaur, University of California (UC), Davis; Maria Pantoja, San Jose State University; Gail Martinez, UC, Davis; Jean Regan, Stanford; Noemi Kanouse, Rancho Santiago Community College District; Ruth Reck, UC Davis; Marna Cooper, UC Merced; Sandra Lier, President of WACUBO, University of Washington.

Second Row, left to right: Glenn Ducat, CSU Chancellor's Office; Ellen Peres, Shasta Community College; Richard Taylor, CSU Monterey Bay; Art Torres, CSU San Marcos; Lylla Bada, University of the West Indies; William Pickens, ELMI Director; Lori Lamb, Washington State University; Deborah Roberson-Simms, CSU Los Angeles; Betty Luna, San Jose State University; Julie Stein, UC President's Office; Ceresa Stewart, Arizona State University; Stephanie McLemore, UC Berkeley.

Third Row, left to right: Bruce Griffin, University of North Carolina at Greensboro; Chuck Walden, CSU San Marcos; Mark Neumayr, University of Alaska at Fairbanks; Gary Matthews, UC San Diego; Janina Latak, ELMI faculty member; David Ross, Kwantlen University College, British Columbia (BC); David Gilbert, UC President's Office; Mike Byers, University of North Carolina at Greensboro; Al Brown, UC Irvine.

Top Row, left to right: Ray Inge, Cal Poly Pomona; Chris McAlary, Cal Poly Pomona; Art Coren, Kwantlen University College (BC); Sieve Smith, Minnesota State University, Mankato; Robert Ambach, Cal Poly Foundation, San Luis Obispo; Rand Stallings, Foundation College.

Carolina. Professionally, participants ranged from a vice president for administration to a director of a major national research institute; from a chief of police to an associate director of a university foundation; from an operations budget officer to an associate vice president for administration and human resources; from the director of facilities management to an audit manager; from a vice president for marketing to an assistant dean in a business school. This diversity of perspective greatly enriches the conversation.

The 2002 session, however, is best described by the participants themselves in their formal evaluations of the ELMI and by a look at the class:

“I am certain that this institute will always rank high among my very best professional experiences...”

“This institute provides excellent professional development for colleges and universities business services.”

“The ELMI should be mandatory for all university and college leaders. ...the most personal and professionally rewarding experience that will have a lifelong positive affect on me and any institution in which I hold a leadership position.”

“Great institute. Really enjoyed the sessions and social activities.”

“Worth every penny! Worth every moment!”

“An in depth survey of the diverse aspects of leadership and management in higher education.”

“Makes you think of topics you don't particularly like but are best in a low key and very respectful style.”

“Don't come to the Institute unless you are willing to have your eyes opened.”

“An experience-based learning environment...It fills a very important niche.”

“Introspective, thought-provoking, energizing, global.”

“Showed me the viewpoints of many leader types across a campus, allowing me to be a more effective leader in my area.”

“The most important educational opportunity for anyone in or entering into higher education admin.”

“The ‘immersion’ aspect of this institute makes all the difference in setting this experience apart from others!”

“The Institute was extremely stimulating and thought provoking...”

For more information about the curriculum and faculty of the ELMI 2002, see www.wacubo.org. The session of 2003 is scheduled from July 17 through July 25 (Thursday through the following Friday)—so mark your calendars if you plan on attending and apply early in 2003. For other information, please contact:

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(858) 571-0926 (FAX)
whpickens@aol.com (e-mail)



Tales from the Front

A Portal of Customer-Centered Resources

(Conclusion of an article begun in our summer issue)

By Weldon Ihrig and Ed Lightfoot

In our previous article:

The University of Washington's model for a web portal is flexible, active, and a personalized transaction-oriented service environment. Through assigning each user a single university ID, individuals gain access to the full range of university services that grow and change as their relationship with the university changes. Be they student, alumnus, employee or donor, the registry that tracks individuals and their associated relationships with the institution.

Relationship Management

The portal depends on the authentication and authorization infrastructure for its power. Logging in with the university ID, the individual is authenticated, and the authorization system can recognize the full set of relationships an individual has with the institution.

The portal can then build a default view of the Web-based information and services appropriate for the individual's relationships with the institution, and the individual can further personalize that view, based on his or her interests and needs. The portal, or relationship manager, will then keep track of the changing relationships and personaliza-

tions over time. This is a very powerful concept that will allow institutions over time to build communities of interest and deepen the relationships that currently exist between individuals and the university.

Services

The services offered through the portal will reflect the full range of activities of the institution: teaching, learning, research, library services, public service, patient care, entertainment, the arts, and so forth.

Concepts such as "My Work" (a personalized dashboard of transaction-oriented services needed to fulfill duties), or "My Studies," which reflects the individualized course content and activities for a student, or "My Admission" application, or "My Employment" application, are ways of thinking about how to organize these services within the portal.

Business-to-business e-commerce services can offer a catalog of both university and external vendor goods and services appropriate to an individual's role within the institution. Business-to-customer services can offer a wide array of targeted services tailored to the

interests and needs of the individual. Avoiding blanket advertising and offering tailored services with the commercialization policies of the institution can be accomplished, based on the roles and user profiles offered by the portal. For example, a graduating senior can be assisted in planning for the graduation ceremony, renting the gown, planning for travel, and arranging for the lodging of his or her visiting family.

Community-building tools allow subscription to, participation in, or setting up of discussion groups, information feeds, or shared activities of interest to the individual.

These tailored service offerings are all possible because of the infrastructure that recognizes who you are through your authenticated university ID.

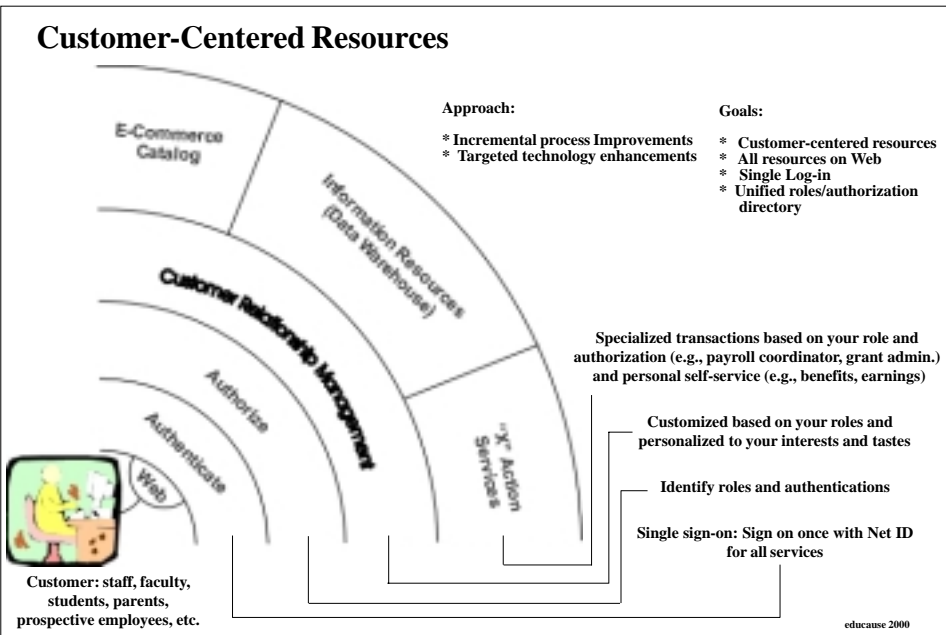
The Challenges

The challenges associated with implementing such a vision are enormous, but they have the potential to be transformational in the same way that so much of what we do today is being transformed by Web technologies and the new economy. A demonstration that reflects some of the University of Washington's thinking about future services can be found at <http://www.washington.edu/protos/myuw/demo>.

To explore some of the current features in *myuw* please try myuw.washington.edu, and hit the button marked: "enter as guest."

We hope this vision and approach will be helpful as you sort through your own unique campus requirements. We would appreciate receiving your thoughts and feedback about the model or the approaches embedded in our *myuw* demo.

Weldon Ihrig is Executive Vice President and Ed Lightfoot is Director, Information Systems at the the University of Washington. They can be reached at: wihrig@u.washington.edu, elight@cac.washington.edu





Break-Out Session

Addressing Performance Problems

By Donna-Jean Louden

In the ideal work situation, most employees are expected to monitor and adjust their own job performance. And, although on-the-job training and frequent evaluations help employees stay on track, occasionally managers and supervisors need to intervene when confronted with a serious or persistent performance problem.

A manager should probably take action when:

- * Complaints have been received about someone's behavior.
- * There has not been enough of a response to prior feedback.
- * An individual's conduct is negatively affecting the work environment.
- * Performance standards are not being met.
- * An individual's behavior has serious possible consequences (i.e., using alcohol or drugs on the job, committing sexual harassment, etc.)

The single most important thing a supervisor can do when faced with confronting an employee's problematic performance is to prepare thoroughly for the initial meeting. As part of your preparation, it may be helpful to ask yourself some of the following questions:

- * What, specifically, is the problem?
- * How does this problem impact the office, coworkers, etc.?
- * What are the facts? This is especially important if you have not personally observed the behavior in question.
- * What could be causing this problem? Is this current issue just a symptom of a more complex problem?
- * Are there any legal or policy issues?

Check your understanding of current policies by making a confidential call to Human Resources or the Ombudsman's office. This advanced preparation will help focus the discussion and can help managers feel more prepared and confident.

The next step is the actual meeting with the employee. The following steps are recommended for providing guidance during the meeting:

1. Describe the problem clearly and objectively.

Best stick to the facts, being careful not to give an interpretation of the problem behavior. "You're not being responsible" is a judgement and less effective than "I have noticed that you have been absent five times this month, seven times in the previous month." Facts are indisputable.

Additionally, making "I" statements (i.e. I've noticed, I understand, It has come to my attention) instead of "You" statements can go a long way toward keeping the other person from becoming defensive. Try to state the problem calmly and respectfully. Becoming angry will make it more difficult to reach a productive conclusion. Be aware of what you're saying and also how you may be saying it.

2. Get a response to your statements.

No resolution will be successful unless it is based on a mutual understanding of the problem. Ask the other person to present his or her perspective. Despite your careful fact-finding,

there may be additional information that you need to hear. Remember too that it can be difficult to hear negative information. No matter how skillfully given, the other person may become defensive because of how they interpret your comment. If you think that the other person may be reacting in this way, it can be helpful to ask them, "What did you hear me say?"

3. Assist the other person in identifying possible solutions.

Brainstorm together a list of solutions to the problem. In the beginning, consider any and all suggestions in order to generate a workable list, then evaluate each solution. It is easy to fall into the trap of offering advice, especially if the other person is having difficulty coming up with solutions.

Asking questions is one way to help them come up with ideas. Questions such as, "What ideas do you have," "What would be best, in your opinion," "How about trying....?" ensures that the other person has some ownership in the solution. Doing this also sends the message that you have confidence in the other person's ability to solve the problem. It also presents the opportunity for bringing up any difficulties that the other person may have in implementing these suggestions.

4. Summarize the agreement.

Once a plan of action has been agreed upon, summarize and clarify the specifics of the plan. Confirm the who, what, when, where and hows. After all the details have been articulated, schedule a follow-up meeting. It's important to check-in with the other person again in a couple of weeks or a month to see how the plan is working. Are things working to everyone's satisfaction? Have there been any new developments since the plan was first initiated? Should the plan be modified or scrapped completely?

5. Leave the door open.

This means it's important to communicate your accessibility to the other person. Reassure them that you are available for clarifying issues or offering support.

Having to confront a person with their performance problems can be anxiety-provoking, but it doesn't have to be. It may help to recognize that, by these actions, you are doing a real service to an employee by helping them get their performance back on track.

(Additional sources for this article include Achieve Global, Ken and Kate Black and Susan Baille, Ph.D. of Career Tracks)

In addition to being Associate Ombudsman at the University of California, Irvine, Donna-Jean Louden is an experienced trainer of the Achieve Global professional development training systems. You can contact her at dmlouden@e4e.uci.edu

Business Management Institute



BMI can change your life... in ways you cannot imagine!

By Monica Boulay

On August 5, 2001, at the Institute's Sunday night opening reception and buffet, Year 3 participant Christopher Reid from Nichols College in Massachusetts and Year One attendee, Lyrae



Williams, from the University of Arizona, happened to sit at the same table and met each other for the first time. One might say that the ultimate in networking occurred... During the opening event at this year's Institute, Lyrae and Christopher announced that they would be married during the Institute! They took full advantage of Wednesday afternoon's free time and the wedding took place on the beach. Many of their fellow participants joined them for the happy event and a celebration dinner. Both Lyrae and Christopher were in their respective Year Two and Year Four classes on time on Thursday morning. Best wishes to Christopher and Lyrae Williams Reid as they begin married life in Massachusetts.

Participants (and relatives!) traveled from 23 states, Guam and Russia. All relished the usual wonderful weather in a perfect setting. Sandra Lier, WACUBO president, warmly greeted participants and thanked them for supporting the Institute and WACUBO. She encouraged attendees to commit to ongoing professional development to strive for optimal performance and maximum opportunities.

WACUBO was delighted to be on campus during the same week that George Pernsteiner began his new position as UCSB vice chancellor for administrative services. Given his hectic schedule during a very busy first week, it was fortunate that he could make time to participate in the Year 4 major issues panel on Friday morning. We appreciate the effort!

Most of the Institute classes took place in different campus space this year. The new space resulted in shorter walking distances and more interaction between the classes. CSU 1, a track begun especially for California State institutions in 2001, again received rave reviews. Designed by the Financial Officers Association of the California State University and coordinated by

Ed Bulinski, university budget officer at California State University, Fresno, the program assists new staff in becoming oriented to the processes and the "uniques" of the CSU System. Said one CSU participant: "I feel that I am leaving with a wealth of knowledge on CSU operations and a very good reference manual."

The Continuous Learning program was added to the Institute in 1997 to offer continuing professional education to senior administrators and those who had completed Years One through Four, but wanted to return to the Institute for professional development with higher education colleagues. Karen Hoefel, headmaster of the Pilgrim School, coordinated the Continuous Learning program, which featured Dave Frohnmayer,



president of the University of Oregon, and Tom Champoux of The Effectiveness Institute. In his energetic, animated style, Tom Champoux also presented the keynote address to students in Years One through Four, Continuous Learning and the CSU 1 sessions. The keynote focused on how the ability to engage in simple, genuine conversation is probably the most powerful tool for a leader.

In Years One and Two, students take a core course of subjects in the mornings that form the basis of knowledge essential for advancement and leadership in higher education administration. New faculty this year included Rogers Davis, vice chancellor for human resources at University of California, San Diego, who taught human resources management and Joanne Coville, Vice President for finance and administration at California State

University, Channel Islands, who taught accounting to non-accountants. New elective topics included leadership theory and practice, equal opportunity and diversity, ten reasons leaders don't successfully implement change, leading in a time of change, and a return of the popular cost-benefit analysis.

Year Three offered sessions by a new faculty member, Bill Jenkins of Huron Consulting Group, covering many aspects of leadership and administrative topics needed to progress in higher education management. Jay Kenton, associate vice president for finance and planning at Portland State University, served as Year Three coordinator. Facilitators included Susan Clarke of Unconventional Wisdom, consultant John McDonald, and Stacy Pearson of Boise State University. Chris Christofferson of Stanford and consultant Craig

Purkey each served as adjunct facilitators. Christofferson also presented a new session on how performance measurement can take your organization to the next level.

In Year Four, Leadership Challenges in a Changing Environment provided students with a variety of topics emphasizing and crucial issues

in higher education. Memoy Harrison Jr., executive vice president for administration and finance at Arizona State University, served as coordinator for Year Four. Friday's major issues panel discussion was a favorite and one student found the strategic planning especially useful: "Great exercise. I love working in a small group and learning from one another. Plus the material is quite appropriate for us and we can take it home."

The Institute offered a demanding week of professional development with plenty of networking and fun during special events in the evening. For information on the 47th Annual Institute in 2003, call Monica Boulay, Institute director, at 520-298-8680 or email at EduSpeak@aol.com. We hope to see you there.



WACUBO Calendar:

Upcoming Events:

October 21	Crisis Management/Emergency Preparedness — Oakland, CA
October 21-22	NACUBO's Intermediate Accounting and Reporting — Redondo Beach, CA
October 28/29	Introductory College and University Accounting — Ontario, CA
November 7	Introduction to Treasury Management — Las Vegas, NV
December 6	Change Management — San Diego, CA
February	CEO Expectations for the CBO — Los Angeles, CA
February or March	Debt Management — Phoenix, AZ
April	Introductory College and University Accounting — Denver, CO
April	Advanced Fund Accounting — Denver, CO
April 20 - 23	WACUBO Annual Meeting — Banff, Alberta, Canada
July 17 - 25	Executive Leadership and Management Institute
August 3 - 8	Business Management Institute

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