



# A Time of Renewal

STAN NOSEK, WACUBO PRESIDENT

Spring has in fact sprung here on the UC Davis campus. The 20 mile ride into the campus on my motorcycle each morning is a treat passing through various budding orchards and greening pastures. This is a great time of year-a renewal of nature and spirit.



It is fitting to mention this in light of the annual renewal that we experience on the WACUBO Board each year. My friend and colleague Mike Unebasami, Associate Vice President for Administration and Community College Operations at the University of Hawaii will assume the responsibilities of WACUBO President for the 2007-08 year during our annual meeting in Reno May 6-9. Mike has been leading a discussion of some by-law and board operating changes this current year and has also been working on the national level with the other regions and NACUBO to help further build our partnership in developing and delivering the most effective professional development programs possible to all higher education business officers.

Jeff Riddell from Cornish College of the Arts in Seattle joined the Board as an At-Large member earlier this year, having served as a member of the Small Institutions Committee. Jeff assumed the vacancy left by Janice Stroh who accepted a position out of the region at Eastern Michigan University as its Vice President for Business and Finance.

Let me share a brief update regarding NACUBO activity. NACUBO President John Walda has moved the NACUBO Board to begin participating in issues of national scope, including a case study of the Spellings Commission on the Future of Higher Education; increased communication with higher education not-for-profit associations; and significant involvement in advising and collaborating with the Department of Education on numerous regulatory and reporting issues directly related to our ability to serve our students. President Walda will serve as our keynote speaker at the annual meeting in May.

NACUBO has established two ad hoc committees to address current issues impacting many of our member institutions. WACUBO's Jay Kenton, Vice Chancellor for Finance and Administration for the Oregon University System, is serving on the UPMIFA (Uniform Prudent Management of Institutional Funds Act) committee. UPMIFA is the updated version of the 1972 Uniform Management of Institutional Funds Act (UMIFA) that provides legal guidelines for the management, investment, and expenditures of endowment funds held by charitable institutions. NACUBO is working with several other higher education organizations to help have UPMIFA enacted in as many states as possible, as it is our position that this updated version will bring the law governing charitable institutions in line with modern investment practices. NACUBO plans to track the progress of individual bills in each state, create talking points for those testifying in favor of this proposed legislation and otherwise serve as a resource for member institutions in each state in this regard.

Sally Roush, Vice President, Business and Financial Affairs at San Diego State University and I serve on the NCAA ad hoc committee. This committee has been established in partnership with the NCAA and in response to recommendations from the NCAA Presidential Task Force on the future of Division I Intercollegiate Athletics, Subcommittee on Fiscal Responsibility. The goal is to find ways to "improve the transparency and accountability" of our nations Division I athletic programs. NACUBO plans to collaborate with other associations to help participate in this effort such as: the National Association of Collegiate Directors of Athletics and the Collegiate Athletic Business Managers Association. Outcomes might include such actions as: establishment of an educational training program for athletic administrators; the development of a set of dashboard indicators; the development of the components of an internal fiscal integrity review; the collection of best practices that would

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WACUBO

## LETTER FROM THE PRESIDENT CONTINUED

support effective financial management; and refinement of financial reporting definitions.

There have also been focused and meaningful exchanges between NACUBO and the four regions, related to the NACUBO Board Composition. See the article entitled, “NACUBO Board Restructuring” on page 7 for details.

Meanwhile, the WACUBO Board of Directors and committees have been continuing to make progress on our major goals for 2006-2007. These are:

- 1) Continuous development of specific professional development opportunities for our region’s community colleges with the intent to better serve, recruit and retain membership;
- 2) Further development of the Comprehensive, Doctoral and Research Institutions Committee (CDRIC) in an effort to enhance our offerings to these member institutions;
- 3) Design and delivery of a professional development institute for business officers with broad responsibilities and limited resources who have been unable to participate in our long-standing summer ELMI and BMI institutes;
- 4) Increased participation of our region’s academic business officers in all of WACUBO’s professional development offerings and board and committee activities; and
- 5) Strategic investment of our resources to increase the value of WACUBO membership to those of you we serve in the western region.

Our Institutes team has been hard at work ensuring quality programs for our members. The inaugural program of the Winter Management and Leadership Institute was held in Tucson January 12-16, 2007.

WMLI reached its capacity of 65 attendees by the early registration deadline, drawing business and academic officers, senior staff, directors and managers from small and large, public and private, two-year and four-year institutions. Planning for the 2008 WMLI is underway.

In addition, the 40th Annual Executive Leadership and Management Institute (ELMI) is scheduled for July 26 – August 3, 2007 at Stanford University. The 51st annual Business Management Institute (BMI) will take place again at UC Santa Barbara this summer, from August 5-10. I hope that you seriously consider taking advantage of these highly regarded programs for either your own professional development or for those within your organization.

And last, but certainly not least, planning for the rapidly approaching 2007 Annual meeting in Reno continues. I look forward to seeing many of you there. If you have not yet registered, please visit our website at [www.wacubo.org](http://www.wacubo.org) and sign up for what promises to be a relevant and rewarding program in the “Biggest Little City in the World” and on the outskirts of the majestic Sierra Nevada mountains.

In closing, I want to say what an honor it has been to serve as the WACUBO President over the past year, working with a volunteer board of directors who contribute in many different ways to serve you, our members. I am more confident than ever that WACUBO is successfully meeting its core purpose, to provide high-quality professional development opportunities to our western region membership.

**See You In Reno!**

**Stan Nosek**  
**WACUBO President**

### 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 [mosher@u.washington.edu](mailto:mosher@u.washington.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 2006 by the Western Association of College and University Business Officers, unless otherwise indicated.

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For change of address, use *MY NACUBO* ([www.Nacubo.org](http://www.Nacubo.org)) or send changes to:

Patty Charlton, Vice President Finance  
 Community College of Southern Nevada  
 6375 W. Charleston Boulevard  
 Las Vegas, Nevada 89146

[patty\\_charlton@ccsn.edu](mailto:patty_charlton@ccsn.edu).

# The Executive Leadership & Management Institute at Stanford

July 26 through August 3, 2007

(Thursday Afternoon through the Following Friday Morning)

For the 40th year, WACUBO is proud to sponsor a major summer institute at Stanford. Over the years, the Institute has changed from a focus on strictly business affairs to a comprehensive experience for 35 participants who are willing to devote one solid week to study and practice the skills required for leadership success in higher education. These are the questions commonly posed about the ELMI.

## Why should I invest eight days in this experience when I can attend shorter events with the same theme?

The ELMI's purpose is very different from a conference or "drive through" seminar. It is a "total immersion" process. The experience is designed to get administrators away from the daily grind, into an intense experience that makes them think deeply. The Institute emphasizes skills rather than mastery of information about administration. We stress cutting edge issues, not simply those widely known or traditionally found in "management" courses. The Institute combines well researched theories with practical strategies and proven techniques to provide the tools to improve your performance and enhance your career.

## Isn't that a long time to be doing the same things?

The Institute uses a variety of formats for interaction about leadership (lecture, demonstrations, round-table discussions, case studies, small groups, videotaping, and executive coaching sessions). There is also time for socializing, networking, and exploring Stanford, one of the world's great campuses.

## There are lots of leadership institutes around, including those that are "total immersion." Is this one different?

Yes, because of its focus on each individual. The experience is tailored to your needs and circumstances. This is not simply a seminar about leadership. It is about helping you identify ways to be more effective and credible wherever you serve. You will increase your self-awareness as an administrator and a leader, and better understand the different roles necessary to be effective.

## What are the subjects covered?

The Institute is a serious exploration of major ideas and difficult challenges in higher education. It deals with the building blocks for successful leadership: effectively handling conflict and crisis; understanding the different "cultures" on campus; improving the decision making process; thinking and acting strategically; communicating complicated information clearly; persuading others; and working in teams.



## Who attends the Institute?

Institutionally, participants come from small liberal arts colleges to medical schools; from community colleges to theological seminaries; from system offices to academic departments in major universities, from giant research campuses to specialized undergraduate colleges.

In terms of positions, participants in 2006 ranged from the Director of an executive Ph.D. program in higher education to the Director of Plant Operations; from a Director of Strategic Planning to the Dean of a School of Aviation; from a Director of Risk Management to a chief of police; from an HR Director to a Transportation Operations Manager. Such diversity enriches the learning experience by exposing everyone to the range of perspectives within higher education.

## What's the "Bottom Line" about this experience?

The Institute is organized around situations which, over the long-term, will make or break the career of a leader in higher education. These sessions deal with challenging situations where success requires anticipation, practiced skill, and unwavering attention to results.

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**FOR MORE INFORMATION OR AN APPLICATION,**  
see the Institute's portion of: [www.wacubo.org](http://www.wacubo.org)

**OR CONTACT William Pickens, ELMI Director**  
4709 Mt. Gaywas Dr., San Diego, CA 92117  
VOICE 858-278-1764 E-MAIL [whpickens@aol.com](mailto:whpickens@aol.com)

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# Prospecting the Adventure: Managing the Odds in the 21st Century

WACUBO Annual Meeting • Reno, Nevada • May 6-9, 2007

There are only two questions on this quiz:

① **Have you registered for this year's WACUBO Annual Meeting?**

If not, you may register for the Annual Meeting (and any accompanying events) by completing and mailing the Registration Form in the advance booklet which, even now, you may be reading. (See pages 9-10). Or, you may register online by connecting to the WACUBO home page: [www.wacubo.org](http://www.wacubo.org).

② **Have you made your hotel reservations?**

We have special WACUBO room rates at our meeting headquarters, The Grand Sierra Resort. Phone them—toll free—at 1-800-501-2651, or on-line at <http://www.wacubo.org> and click on the Grand Sierra Resort registration link. Please identify yourself as a member of WACUBO when you are making the reservations.

## JOIN US FOR SPRINGTIME IN THE SIERRAS

There are few experiences that can match the lush landscapes and heady atmosphere of spring in the High Sierras and the High Desert. And when you attend the Annual Meeting in Reno this May, you'll have plenty of opportunities to savor that experience for yourself.

We have an attractive and energizing agenda, prepared specifically for WACUBO members by our Program Committee. You will also find the informal information exchanges among us, our business partners, and professional sponsors among the most important aspects of this gathering. So take advantage of the networking opportunities at every session, reception and coffee break.

You'll also have the opportunity to explore the natural wonders that make the Reno/Tahoe area one of the world's top travel destinations. A few suggestions:

**Drive up Mt. Rose** for fantastic views of the Truckee Meadows and the Carson Valley below. Mt. Rose Highway takes you 8,900 feet to its summit, with the alpine sights

changing at every turn, along with tantalizing glimpses of **Lake Tahoe**. And when you drive down the other side, you'll be at the most fascinating alpine lake in North America. The whole drive up is less than an hour.

**Drive around the Lake** (72 miles) and view the surprisingly varied Nevada and California shoreline. (Portions of Hollywood's "*The Godfather*" and TV's "*Bonanza*" were filmed there.)

**Art galleries and the Nevada Museum of Art** are in downtown Reno, and so is **Truckee River Whitewater Park**, where you can watch kayakers run the specially-constructed rapids from a while you dine in a cafe or enjoy the River Walk.

You can **hike** to your heart's content in the Sierras. Visit our nearby State Capital, **Carson City**, or find out why Nevada is called "The Silver State" up on Mt. Davidson in **Virginia City**. And the singular beauty of our **High Desert** is easily accessible.



PHOTOS ARE COURTESY OF RSCVA

# Prospecting for Information

## Information Exchange Program



The format of the program and the layout of the Grand Sierra Resort 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 share their expertise. Relationships developed in these casual but informative conversations benefit both the WACUBO membership and our business partners.

In addition to the exhibitors who provide opportunities for members to view the latest innovations in products and services, the sponsors contribute to the success of the Annual meeting by their support of program elements and signature social events.

We again welcome *Bank of America* as sponsor of the *WACUBO Golf Tournament* on Sunday morning. The D'Andrea Golf Club will challenge WACUBO golfers with 6,849 yards of dramatic layout through foothills and high desert canyons, and a back nine that includes spectacular views of the Sierra Nevada Mountains. Those who prefer walking without golf clubs may enjoy the lovely Truckee River walk with a knowledgeable host guide.

After Sunday morning's activities, the doors open for the Information Exchange Exhibits. Special Afternoon Treats – both food and early arrival prizes – will be in store for those who join us in the Nevada Room from 2:00 to 4:00 p.m..

Longtime Platinum partner *Follett Higher Education Group* continues the sponsorship of WACUBO's Gala Opening reception and Dinner at Harrah's National Automobile Museum. The evening will be a great way to start your engines in celebration of the kickoff of the 69th WACUBO Annual Meeting as you move through the "streets" to view historic cars, enjoy dinner, chat with colleagues and dance the night away.

Monday night, save time to join friends at the favorite *Sweets in the Suite*—another WACUBO Annual Meeting signature hospitality event sponsored by *Scott Deaton* and *Follett Higher Education Group*.

Before the meeting closes you will enjoy the Annual Reception sponsored by *George K. Baum & Company* as a prelude to the *Annual Banquet and Dance*, enlivened by the sponsorship of *Commonfund*. The dining experience will include live music and dancing.

We value the support that 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 as we continue *Prospecting the Adventure: Managing the Odds in higher education*.

### EXHIBITORS

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## Preconference Workshop – Retirement Planning

Retirement may be right around the corner...don't be left stranded in the dark.

We highly encourage you to attend this informative Retirement Planning Workshop that is scheduled to be held from 9:00 a.m. until 12:00 p.m. (noon) on Sunday, May 6, 2007.

The Retirement Planning Workshop is designed to help individuals/couples become interactive and financially prepared for retirement. Don't be left behind! Put your mind at ease! Stay on top of the do's and don'ts pertaining to your retirement plans. This three-hour workshop provides valuable information to assist you in your retirement planning. This is the time for you and your spouse/partner to share with each other priceless ideas and expectations of retirement. A highly skilled professional will host this workshop and provide ways to accumulate your assets and create a plan best suited to your needs. Remember to bring your questions to the workshop and contribute to the challenges that are just ahead of you.

Remember your registration fee is only \$50 and as an additional benefit, your spouse/partner may attend the workshop at no extra charge.

To register online, visit [www.wacubo.org](http://www.wacubo.org) and click **ONLINE Registration** then select workshops.

## WACUBO on the Green

Golfers—prepare for a unique experience as you tee off on one of the area's newest courses, D'Andrea Golf Club. Only six years old, D'Andrea has matured into a beautiful course favored by locals and visitors alike. The course, a 6,849, par 71 layout, recently was given a Four Star rating in Golf Digest's "Best Places to Play." Situated just minutes from Reno/Tahoe International Airport and the bustling activity of downtown Reno, D'Andrea meanders through mountainous foothills and high desert canyons. As a bonus, you will be afforded a magnificent view of the city and the Sierra Nevada Mountains as you ascend the scenic back nine. You won't want to miss this course.



PHOTO IS COURTESY OF RSCVA

**REGISTER ONLINE** for the 2007 WACUBO Annual Meeting.

Visit our website <http://www.wacubo.org> and click on the online registration link.

# NACUBO Board Restructuring

Last year, the NACUBO Board established a sub-committee to examine board makeup and suggest ways in which it could better represent membership and more effectively address strategic issues. President John Waldo presented this resultant proposal to the four regional associations: EACUBO, CACUBO, SACUBO and WACUBO.

At the WACUBO Board meeting in late January, John Walda joined our group to discuss the NACUBO Board Composition/Term Proposal. We had an excellent discussion with many differing points of view coming forward regarding this proposal and possible alternatives.

The WACUBO board came to the following consensus position:

- 1) The current board size (25) is too large and should be reduced
- 2) The regional organizations should continue to appoint three representatives to three-year staggered terms
- 3) At-Large positions are essential in order to have a diverse and balanced board representing the NACUBO membership institutions
- 4) Terms should be for at least 3 years with the possibility to be renewed for an additional term

Now, that being said, we continued for a couple of weeks after our board meeting with email conversation on this topic finding ourselves debating various issues on how the above should be operationalized. An email from our most recent past President and current NACUBO Board member, Jay Kenton, offered some observations and points of view that completely changed the tone and tenor of our conversations. Jay's comments made us ask ourselves if we all weren't responding to the wrong question. Rather than spending so much time trying to figure out how many, who, and how long should people be on the NACUBO Board, shouldn't we first be discussing (and coming to a clear understanding) of the NACUBO mission, where it overlaps with the regionals and where it doesn't, and then seek to build a board structure that helps best to accomplish that mission. The NACUBO Regional Presidents, NACUBO President John Walda, and NACUBO Board Chair Morgan Olsen met in Dallas on March 2-3, 2007 to have a discussion on this issue.

This group agreed with Jay that any decisions with regard to the composition of the NACUBO board need to be driven primarily by the need to have directors who are qualified - by experience, skills and desire — to advance the national goals of NACUBO through active board service.

This day-long discussion resulted in the following recommendations regarding NACUBO Board makeup:

- 1) The number of regional representatives on the NACUBO Board should remain at 12, with 3 selected from each region by its board for staggered, three-year terms (no change). Each region should take responsibility for reviewing how they select NACUBO directors, with the goal of sending members who fit the needs of NACUBO as it seeks to build a board which is centered around and able to provide leadership for the distinct mission and goals which are NACUBO's. This may mean that regional directors are not selected ex officio, but rather based upon a judgment of their ability to meet NACUBO's needs. John Walda agreed to provide a concise description of the role that NACUBO directors should play to help guide regional board member selection decisions in the future.
- 2) The number of at-large members should remain at 9. The requirement that three of them need to be business officers should be dropped, in order to allow maximum flexibility in the selection process. Everyone agreed that At-Large members add great value to the NACUBO Board and provide the opportunity to achieve balance and diversity on the NACUBO Board.
- 3) Officers should be current board members. All agreed that NACUBO Board officers should be chosen from the Board and should remain in their member classification (regional or at-large) while serving as vice-chair and chair. It should be the practice to choose these leaders at a time when they can serve as officers without extending board terms, but an additional year of board membership should be extended to allow a Board chair whose term is concluding to serve a final year on the Board as immediate past chair.
- 4) A President's Council should be convened by the President of NACUBO, comprised of the NACUBO President, the Regional Presidents, and the NACUBO Board Chair. They should meet 3 times a year in conjunction with one of the spring regional annual meetings, the NACUBO annual meeting, and one of the fall annual meetings. This would provide valuable opportunities for these individuals to exchange ideas, cooperate and plan together.

So, the end result of these proposed changes is that the board membership would be reduced from 25 to 22 (or 23 if the past chair's term would need to be extended one year to complete this assignment), regional boards would be asked to identify national board representatives based upon the specific goals of NACUBO over their 3 year term, and all members could be eligible for an additional 3 year term as the circumstances warranted.

This proposal was accepted by the NACUBO Board at the March 17 meeting. Any changes that this proposal may require in the NACUBO by-laws will be presented to the membership at the NACUBO annual meeting in New Orleans, July 29-31.

## COMPREHENSIVE DOCTORIAL RESEARCH INSTITUTES COMMITTEE UPDATE

The Comprehensive Doctorial Research Institutions Committee (CDRIC) has been working on finalizing our annual luncheon meeting in Reno. This year's luncheon will focus on the top five issues facing CDRIC's institutions. Utilizing the results from a recent NACUBO study, we will have roundtable discussions and commentary amongst our peers which will help us prepare for concerns facing our institutions. With so much coming up in the educational realm, this is a meeting/lunch that will provide both an overview of areas to be aware of and great networking opportunities. Be sure that you plan to attend WACUBO's 2007 Annual meeting in Reno, Nevada on May 6-9, 2007, so that you may learn about these top issues, as well as take on the opportunity to share your experiences and concerns. See you in Reno!

## SWING BY THE NACUBO CENTRAL BOOTH AT THE ANNUAL MEETING

NACUBO Central is coming to WACUBO! Come meet the folks from the Washington, DC office and learn about My NACUBO, your window to all things NACUBO.

My NACUBO serves as your access to all online NACUBO activities. From here, you can:

- Edit personal information
- View past purchases
- Review CPE earnings
- Purchase books, conferences or webcasts
- Access Enterprise products such as the NACUBO Endowment Study (NES) or the Financial Accounting & Reporting Manual (FARM)

You can also generate CPE certificates for the NACUBO programs you attended right from your computer. We'll show you how. With two screens, you can select the sessions you attended at a particular meeting and then automatically create your official NACUBO CPE certificate.

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# Winter Management & Leadership Institute Debuts to Capacity Crowd

January 12, 2007 marked an exciting milestone in WACUBO professional development: The new Winter Management and Leadership Institute debuted in Tucson January 12-16 to a capacity crowd. With attendance limited to facilitate small group activities and networking, the program reached maximum attendance on the early registration deadline, and a waitlist was created. The program drew 65 people from small, two-year and large institutions. Participants came from 16 states nationwide and Micronesia. Academic business officers, departmental administrative officers, vice presidents, controllers and directors were among the participants.

Held at the Tucson University Marriott, adjacent to the University of Arizona, we were fortunate to have tremendous support from the University of Arizona. We are grateful to Charles Ingram, Tyson Korhonen and Glory Novak and their departments for their contribution to the event's success.

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 on Friday morning before the Institute began, enabling committee members to meet many of the participants during registration. Committee members Chris McAlary and Jeanne DeMatteo served as faculty. Members Jeff Riddell and Bob Nettles attended the program and, with Jeanne and Chris, helped facilitate group activities. Curtis and WACUBO president Stan Nosek welcomed participants and stressed the importance of the Institute and the high priority the Board gives to professional development. Board member Dennis Klaus also addressed the group and was our host. As former chair of Small Institutions Committee, Dennis served as chair when the WMLI was proposed and approved by the Board. WACUBO treasurer Lorretta Leavitt attended the full program and participated in the major issues panel.

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, offering timely topics, nationally known faculty, and valuable opportunities to discuss management and leadership challenges with colleagues.

Participants enjoyed the free nights on Saturday and Sunday and formed groups to walk to nearby restaurants, or explore areas of the city. Many sampled Tucson's delicious Southwestern and

Mexican cuisine. On Monday night David Fitzsimmons, political cartoonist from the Arizona Daily Star, entertained us with his irreverent views on the state of local and national politics, current events and many other topics, illustrating his points with humorous caricatures.

Chancellor Rufus Glasper of Maricopa Community Colleges delivered an absorbing keynote address on the *State of Higher Education in the U.S.* 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. Janina Latack, Career Consulting and Effectiveness Coaching, presented two sessions, one on *Managing Conflict and Difficult People* and a second on *Creative Problem Solving and Communication Techniques*, during which participants used their imagination and demonstrated their innovative talents. Drawing upon their backgrounds as business officers, and experience as a chancellor and president, Rufus and Jairy teamed to discuss *Reporting to the Board*.

Ed McFarlane of Reed College presented ideas to *Prepare for Accreditation*, and to view it as a valuable planning and evaluation process. An overview of *Higher Education Law and Legal Issues* was delivered by general counsels Christine Helwick of the California State University and Paul Ward from Arizona State University. Jeanne DeMatteo and Peter Michell of St. Mary's College of California joined Erin Gore and Rick Chisholm from Bank of America to lead a discussion on *Financing Issues and Challenges*. Chris McAlary from Mount St. Mary's College and Chris Christofferson from Stanford University teamed to present the important issues in *Managing Facilities and Administrative Costs*, from both a vice president's and a facilities professional's viewpoint.

Rick Schlegel of United Educators discussed issues and challenges in the area of *Risk Management*, and measures to minimize those risks. Plans for *Business Continuity and Emergency Management During a Major Crisis* were covered by Valerie Lucus from University of California, Davis. Richard Katz of Educause presented a view of the *Future of IT and Emerging Technologies to Watch For*, as well as their impact on delivery of campus services. Allison Vaillancourt from the University of Arizona spoke about *Human Resources Management*, addressing the strategies required to acquire and engage the top-rate talent your organization needs to achieve its aspirations.

The WACUBO Board has approved a three-year pilot of the WMLI. Watch the website at [www.wacubo.org](http://www.wacubo.org) for details on the second program to be held in Tucson next January.

## FOR MORE INFORMATION

contact Monica M. Boulay, Institute Director, at [EduSpeak@aol.com](mailto:EduSpeak@aol.com) or (520) 298-8680.



See you this summer at the...

# Business Management Institute

August 5 – 10, 2007

Revitalize yourself and advance your skills this summer at the 51st Annual WACUBO Business Management Institute at Santa Barbara, August 5-10, 2007. Held on the beautiful seaside campus of University of California, Santa Barbara, Institute participants can expect outstanding weather, wonderful catering and exceptional hospitality from UCSB staff.

As one of WACUBO's cornerstone professional development programs, the Institute offers a four-year curriculum for managers, supervisors and staff who perform mid-level administrative and business functions for the institution. Those new to higher education find the Institute very valuable in providing an overview of higher

education and an opportunity to begin building their higher education professional network. It's an opportunity to obtain a week of intensive, relevant professional education with higher education colleagues from across the country.

The program begins on Sunday with registration and a welcome buffet and concludes on Friday at noon. Sessions fill each day, with evenings devoted to relaxation and mingling with participants. Special events include a beach party with buffet and a final outdoor buffet featuring a DJ and dancing. On Wednesday afternoon, participants have free time to visit the beautiful Santa Barbara area to discover its history and culture, stroll on the beach, and sample the local cuisine.

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## BMI AT A GLANCE

### KEYNOTE ADDRESS

#### *Outrageous Success: A Journey from the Inside Out*

In this dynamic keynote address, Dr. Barbara E. Riley and Dr. Delyte D. Frost of the Chambers Group in Charlotte, North Carolina, will present the power tools for *Outrageous Success* and describe how to obtain the greatest benefit. The tools are: being awake and aware; changing your mind: changing your life; banking on intuition; developing x-ray vision; hearing our hearts speak; owning what we know. Our destination: creating what we want. Drs. Riley and Frost are principals in the Chambers Group and are seasoned consultants and executive coaches who bring wisdom and a wealth of experience to the challenges of leadership.

### YEAR ONE

Year One will feature *College and University Accounting*, divided into sections for accountants and non-accountants. Jerry Farley, president of Washburn University, will teach the accountants' section; the non-accountants' course will be taught by Kathleen McNeely of Indiana University. Allison Vaillancourt, University of Arizona, will present an overview of *Human Resource Management*. In *Higher Education Law*, Beverly Ledbetter of Brown University will cover a broad array of legal concepts and issues and discuss a conceptual legal approach to some of the operational problems facing the college administrator and the institution. Jerry Farley will present a new topic, *So You Want to Become a Business Officer? Motivation*, with a lively presentation by Sean Joyce, president of Omega Consultants to Management, completes the Year One core course offerings.

### YEAR TWO

The Year Two program will feature *Principles of Management*, examining contemporary management practices, leadership, motivation and communication presented by Jack Blanton of the University of Kentucky. Craig Purkey, consultant and retired from the University of Washington, will present *Planning and Budgeting*, discussing how budgeting plays an important role in policy and strategic planning. Barry Walsh, from Indiana University, will present the *Information Technology* session, which will focus on latest directions in IT, the necessary infrastructure, its impact and the people and process issues involved. Sean Joyce's *Creative Problem Solving* explores alternatives to habit-bound thinking, and Jerry Farley's *Humor in the Workplace* rounds out the Year Two core courses.

Years One and Two students customize their curriculum by selecting elective courses on Monday, Tuesday and Thursday afternoons. Electives focus on technical, management, leadership, personal development and hot topics. New topics for 2007 include a session on sustainability by Chris Christofferson of Stanford; Power and Influence by Sean Joyce; and an Excel course by Alex Sanchez of UCSB. Returning faculty and topics include Jeff Marsee offering *Why I Like You, Why I Don't*; Rick Schlegel from United Educators will discuss *Litigation Landmines and Risk Management*; Sean Joyce will present *Delegation and Dealing with the Irate Customer*; and *Innovations in Auxiliary Services* will be explored by Bill Dickerson of California State University Fullerton. Other sessions will focus on internal controls, ethics, interpersonal communication styles and team building strategies.

## YEAR THREE

Through intense case study of typical campus scenarios, Year Three builds on the fundamentals learned in Years One and Two. Sandra Lier, associate vice president for finance at University of Washington, will serve as Year Three coordinator. Sessions will include *Performance Metrics* by Chris Christofferson, followed by further discussion in a case study. Stacy Pearson, Boise State University, will examine *Ethics and Compliance Issues* and lead exercises in making ethical choices. Ruth Johnston, University of Washington, will discuss how to *Develop Yourself and Others as Knowledge Workers*. The critical skills necessary for *Effective Written Communications* and those difficult conversations that we encounter will be addressed by Allison Vaillancourt.

Daily case study sessions will be facilitated by faculty members Sandra Lier, Susan Clarke of Unconventional Wisdom, Chris Christofferson, Stacy Pearson, Lorretta Leavitt of San Diego State University and Craig Purkey. Participants work in small groups to explore responses to common challenges administrators face today. Each student will also write a brief case study in advance, either on a current unique campus situation, or about circumstances often encountered in higher education.

## YEAR FOUR

Year Four offers a conference format and again will be coordinated by Mernoy Harrison, vice president and executive vice provost, Arizona State University at the Downtown Phoenix Campus. The theme is *Leadership Challenges in a Changing Environment* and the focus will be on those skills, actions and tools necessary to influence and provide leadership to thrive in this constantly changing world of global competition.

Rufus Glasper, chancellor of Maricopa Community Colleges, will present sessions on the *Theory and Practice of Leadership*. Ruth Johnston will present two sessions, one on *Measuring Organizational Performance*; and a second focusing on *How to Create an Organization that Fosters Positive Change* — discussing strategies to lessen fear and resistance. President Jairy Hunter of Charleston Southern University will lead a comprehensive *Strategic Planning* workshop including interactive small group work to

develop and put forward a strategic plan. In *Building the Business Case*, Bill Jenkins of Huron Consulting will outline an effective approach to the development of business cases to support revenue enhancement and cost management initiatives that are aligned with strategic objectives. Don Norris will explore options and decision making in *Financing Information Technology*, and Beverly Ledbetter will discuss *Critical Legal Issues*, highlighting leadership in the higher education legal arena. The *Latest Challenges in Business and Financial Areas* will be discussed in an interactive session led by Mernoy Harrison. The program will wrap up with a major issues panel discussion, in which participants will identify the topics and issues to discuss.

## CONTINUOUS LEARNING

### *The Journey to Outrageous Success*

Your *Journey to Outrageous Success* is a journey from the inside out. Travel with Barbara Riley and Delyte Frost through the 7Chambers™ of personal exploration—connecting head, heart and spirit. The journey within the 7Chambers™ asks each of us to explore the interior terrain of our being; offering a path to find, name and claim the unknown, unintegrated part of ourselves... transforming our energy into competence beyond our wildest dreams.

In August, don't miss this informative and energizing program. Join your colleagues for professional development in the lovely oceanside, informal and relaxed Institute setting at the University of California, Santa Barbara.

## FOR MORE INFORMATION

contact **Monica M. Boulay, Institute Director, at** [EduSpeak@aol.com](mailto:EduSpeak@aol.com) or **(520) 298-8680**.





# WACUBO Calendar

SPRING ISSUE 2007

April 13	WACUBO Professional Development - Internal Controls, Accountability and Ethics	Salt Lake City UT
April 20	National Consortium for Continuous Improvement in Higher Education (NCCI) workshop – Measuring and Demonstrating the Value of Improvement Initiatives (visit their home page for additional information <a href="http://www.ncci-cu.org/">http://www.ncci-cu.org/</a> )	Los Angeles CA
April 22-24	SACUBO Annual Meeting	Oklahoma City OK
May 6	Retirement Planning (Pre-conference Workshop)	Reno NV
May 6-9	WACUBO Annual Meeting	Reno NV
July 26- August 3	WACUBO Executive Leadership and Management Institute	Stanford University
July 28-31	NACUBO Annual Meeting	New Orleans LA
August 5-10	WACUBO Business Management Institute	Santa Barbara CA
October 7-10	CACUBO Annual Meeting	Chicago IL
November 4-6	SACUBO Annual Meeting	White Sulpher Springs WV

## WACUBO

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