



WACUBO explores New Frontiers for Membership

January, 2003
Issue 39

By Sandra Lier

Last November I attended the NACUBO Advance and Board meeting held in

Scottsdale, Arizona, along with several members of the WACUBO Board— Past President Tony Flores, Past President Pat Oliver, and 1st Vice President Bill Everhart. As incoming Chair of NACUBO, Past WACUBO President Pat Farris chaired several of the

that affect our institutions and our profession. We also need to be aware of ways that we can enhance ACUBO professional development programs in order to improve the skills and professionalism of the business officer.

WACUBO members are participating on various recently-established NACUBO Board subcommittees. These subcommittees are the Executive Governance Committee - Pat Farris; the Planning Committee - Pat Oliver; the External Relations Committee - Sandra Lier; the Performance Oversight Committee - Tony Flores; and the ACUBO Steering Committee (ASC) - Chair Pat Farris, Sandra Lier, and Pat Oliver. Each of these subcommittees has a mission statement and a list of goals to accomplish over the next three or so years. NACUBO staff assignments have been realigned to support these goals.

Professional Development Chair Suzanne Green and 1st Vice President Bill Everhart represented WACUBO at the ACUBO Innovation Council (AIC) meeting. The AIC reviews and recommends projects for funding by the ACUBO Steering Committee (ASC). Two projects are currently underway. The first project is the Distance Learning Platform for all of the partnering associations that will offer affordable professional development programming to members without the burden of travel costs and time away from campus. The second will offer professional development programs specifically targeted to business officers at community colleges by spring of 2003.

Each of the regions was asked to give a report on the past quarter's activities. A shortened version of my report on WACUBO activities follows.

ELMI at Stanford

The Executive Leadership Management Institute (ELMI) was held between July 26 and August 3, with 35 participants attending, the maximum number possible. Geographically, attendees came from Canada, West Indies, California, Alaska, Minnesota, and North Carolina. Core classes included an assessment of leadership and public speaking style, overviews of higher education and public policy, and courses on the leader's responsibilities in managing crises, public relations, and difficult people. The overall evaluations for 2002 were the most positive in the ELMI's history.

BMI at Santa Barbara

"Another phenomenal experience" was one Year 3 student's description of the 46th Business Management Institute (BMI), held between August 4 and 9 at the University of California - Santa Barbara. Tom Champoux provided the keynote address, Leading with Conversation, and made the point that the ability to engage in simple, genuine conversation is probably the most powerful tool for a person who chooses to lead.

The scope of the BMI is being expanded to target a larger number of mid-management professionals who may be unaware of the program and its benefits. We will continue the

Continued, Page 2

Advance sessions. For insight on some of the issues that faced us at the Advance and Board meeting, please take a look at NACUBO President Jay Morley's presentation on the current environment at the following address:

http://www.nacubo.org/presidents_corner/.

The NACUBO Advance is held each fall and gives the leadership of NACUBO, EACUBO, SACUBO,

CACUBO, and WACUBO (the "ACUBOs") an opportunity to work together on planning for emerging national and regional issues. As all of us move forward to provide better representation on higher education issues, we need to be better prepared for public comment on those policies



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President's Message (continued)

New Frontiers for Membership

by Sandra Lier

two-day track for financial and administrative staff new to the California State College System.

WACUBO Workshops

Professional development opportunities continue to expand this year to cover new topics. In response to your much-appreciated suggestions, workshops are being added in a variety of disciplines. A complete listing of our winter and spring classes is included in this newsletter. In addition to our popular Introductory and Advanced College and University Accounting workshops held this year in Denver, CEO Expectation for the CBO in Los Angeles and Debt Management in Phoenix will be offered.

WACUBO Strategic/AIC Planning

The WACUBO Board is focusing on achieving the strategic goals developed in February 2002: to provide high quality technical, managerial and leadership development programs; to increase and diversify our member institutions and representatives; and to assess our options to use technology to benefit WACUBO, particularly to improve web-based services by using the WACUBO website strategically for communication and registration.

First Vice President Bill Everhart has been asked to form a task force to review the financial stability/viability of WACUBO in three specific areas--our overall risk management strategy, our strategy towards investment management and review, and our strategy for reserves.

Lastly, working with the Database Administrator, the Membership Committee, and the Community College Committee, a communications campaign has been initiated to increase the membership. Letters of invitation to join WACUBO were mailed to non-member institutions in the region including all of the regional community colleges.

Annual Meeting

Planning continues for the 2003 Annual Meeting to be held in Banff. Since it will be earlier than usual and span the Easter weekend, we decided to focus on families attending as well as our membership. The early date will enable us to afford the Banff Springs Hotel--a beautiful 5-star hotel in the Canadian Rocky Mountains. The meeting dates are April 20-23. You all come and wear warm clothes! I'm looking forward to seeing all of my old friends and colleagues...and some new ones, too!

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 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 raclemmo@uci.edu.

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

TO SOLVE	WORKING WITH LEADING COLLEGES AND UNIVERSITIES COMPLEX BUSINESS PROBLEMS.
<p>Financial Management. Operations Improvement. Compliance Assessments. Information Systems. Strategic Planning. Welcome to PricewaterhouseCoopers' Education Advisory Services (EAS) practice where we deliver integrated business solutions for colleges and universities. To learn more about our EAS practice or about our audit, tax or HR services, visit our Web site at http://www.pwcglobal.com/education or call us toll free at 1-888-272-3236.</p> <p><small>© 2002 PricewaterhouseCoopers. PricewaterhouseCoopers refers to the individual member firms of the worldwide PricewaterhouseCoopers organization. All rights reserved.</small></p>	



The Workplace

Keeping Safety at the Forefront of Capital Projects

By Richard Chapman

The University of Washington's Capital Projects Office is designing safety into the construction blueprints. Author Richard Chapman shares lessons learned as they actively sought to bring safety issues to the design table:

A major construction program in the University setting, which is more publicly accessible than most industry sites, presents a unique safety challenge. Students, faculty, staff, Regents, alumni contractors, and the general public all have easy access to University property, and there is a real need to protect people from construction hazards. The University of Washington Capital Projects Office (CPO) is committed to doing its part in providing a safe project work environment while keeping a billion dollar construction program on budget and on schedule.

A year ago, CPO was unsure of the total number of safety incidents occurring at our contractor-managed construction sites, but believed that safety incidents were occurring with too great a frequency. We were in the excavation stage of several major projects, and were scaling up our activities, so it was essential to gain a better understanding of the safety performance of both our projects and of individual contractors. At this stage, we had no metrics to judge the safety performance of our projects relative to comparable construction projects in the U.S.

The contractors utilized by CPO had thankfully experienced few major injuries, so there was some complacency, and little sense of urgency driving an increased empha-

sis on safety. But, the significant construction activities on our campuses meant an influx of contractors and equipment, accompanied by the increased risk they represent. There was always the fear that a piece of mobile equipment would be improperly secured, get loose, and run through a group of students, with subsequent injuries. While the UW-CPO staff of about 125 knew how to get projects built, we were not systematically factoring safety into project design or implementation. We knew that a systematic approach could be integrated into construction projects. This would help to mitigate increased risks. DuPont Safety Resources were brought in to work with us and use their proven six-step approach to contractor safety.

DuPont performed a rigorous assessment, comparing existing CPO processes and systems to best practices. They coached us in the development of systems to measure project safety performance and to track injuries and incidents. We established a central safety committee to regularly review the data and make recommendations to address the root causes of safety issues. Now the CPO can analyze the safety performance of different projects and contractors—and when an injury occurs we are able to look at other projects, identify where similar injury potential might exist, and take swift action to alleviate the risk of further injury.

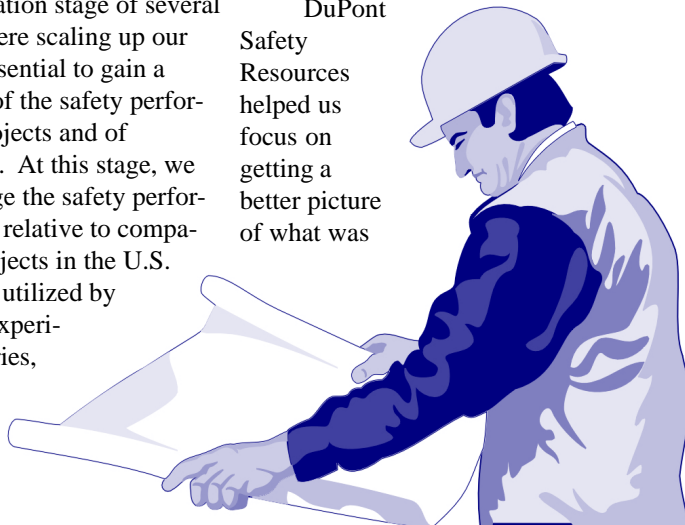
DuPont Safety Resources helped us focus on getting a better picture of what was

really happening on our construction projects. Because the construction projects were underway, DuPont Safety Resources worked extensively with the CPO field staff to hone their auditing skills, training them on how to do audits and assess hazards, and providing influence strategies for getting the contractors to address identified hazards. CPO employees were taught to “preview” projects and anticipate where unsafe conditions would be created in the construction process—then they were taught to find ways to eliminate or mitigate these hazards.

Time was also spent establishing site safety standards, like those for personal protective equipment, such as hard hats, safety glasses, and footwear. Standards were enforced for all those who visited the construction sites—contractors, CPO staff, and the university faculty who sometimes needed access to the construction sites. Many of the university faculty members had never worn safety equipment before, and it took a while to get everyone comfortable with the new requirements.

We've already reduced our injury frequency by 50%—that's a significant improvement in just one year—and these injury reductions were achieved at the same time that annual contractor hours doubled. After just one year, CPO personnel have enhanced safety awareness, developed clear safety metrics, and improved reporting of safety incidents. We work every day toward the goal of zero injuries and believe that everyone affiliated with these projects and in the proximity of these projects has a right to expect that the project environment is safe.

Richard Chapman is Associate Vice President for Capital Projects at the University of Washington. Richard can be reached at rkchapma@u.washington.edu.





Tales from the Front

One-Stop Shopping for Student Financial Services; A Reality Check

by Beth Barker

The WACUBO annual call for papers yielded proposals from two member schools taking on organizational change in the delivery of student financial services. Beth Barker, Director of Business Affairs, and Kate Peterson, Director of Financial Aid and scholarships, at Oregon State University along with Ruth Johnston, Associate Treasurer and Assistant Controller at the University of Washington decided to collaborate. Several emails and a conference call resulted in this article, as told by Beth Barker.

Ruth works within Financial Management organization at UW, leading a group of 35 Student Fiscal Services staff involved in direct customer service, receivables and collections, student accounts, and student loans. Over the past two years, Ruth has led the merger of two office units into one.

Beth and Kate's partnership began three years ago with a shared goal of moving toward a collaborative relationship between staff from Kate's financial aid office and Beth's business office. Kate's reporting structure is within the division of academic affairs at OSU. Beth's unit is within the division of finance and administration at OSU.

What do you mean when you use the phrase "One Stop Shopping?"

Beth: Avoiding the student experience of shuffling from office to office for an answer."

Kate: The students shouldn't have to care that the business office is a part of a different organization than the financial aid office; we need to provide coordinated student service.

Ruth: With separate offices on different floors, and delivering services that were electronically integrated, going from one office to another for the students was a bureaucratic nightmare and no longer made sense.

What defines a capable staff successful at delivering student services?

Ruth: My ideal is people who love to work with students, who are incredibly good at synthesizing a lot of information, and able to provide resources and referrals. I need staff who know how to find the answer to anything.

Kate: I look for people with an unusual combination of really liking people and are also very detail oriented and technical.

People in the front line need to be something of a generalist, although there is so much information, that being a generalist with a great deal of knowledge and people skills is really a specialty all of its own. Sitting back behind them there needs to be the specialists. There is so much information that the institution is responsible for, that the specialists in specific programs are needed.

What are the top three challenges in getting to One-Stop Shopping?

Kate: 1) Cross training staff – bridging and building relationships and trust amongst staff across the organizational divisions.

2) Staff continuity - there is a high burnout rate for front line staff. They can go somewhere else on campus and earn a dollar more an hour, not have to work so hard and not get beat up.

3) Understanding the culture of your upper management – finding the right mechanism for your institution to educate the campus community about what we do and why it's important to develop trust and credibility.

Ruth: 1) Communications between offices – eliminating the gap so that you have an educated staff who like what their doing and can sustain the work.

2) Staff empowerment – customer service staff are often the lowest paid. Provide training and direction to get them to where they know what they need to know and when they need to ask. Getting them to go ask 'Why not?', and 'What if?'

3) Supportive culture from upper management.

Is One-Stop Shopping an appropriate strategic initiative?

Ruth: It's always going to be a vision, so yes of course. Will we ever get there? Probably never quite exactly. But the vision is absolutely right on.

Kate: I agree. From the student's perspective, the services we provide help them with "paying for college." The services should be transparent and as stress-free as possible.

Beth: So we all agree that this is not a fad, or this year's buzz word and we should be talking with our bosses about this. This is real.

Letters

Implementing Change, Step 1 (Fall, 2002)

Facilities Services at the University of Washington would certainly not quibble with your declaration that "...it typically takes at least five to ten years to change a culture," and we applaud your admonition to adapt the change process to the culture. Nonetheless, we hope that change agents do NOT simply accept the culture or let the culture drive.

In our experience, (...Sometimes the old culture) reflects a traditional hierarchy that fostered a culture of passing the buck, shirking responsibility, and tolerating transgressions. ...The small percentage of sub-par performers roll along, diluting the morale of the rest of the troops and lowering the bar over the long haul.

To some degree, manager laxity allowed these negative features to become embedded. We (now) aim to change what is undesirable and cite what is good in the culture.

We are trying to cast the change in the light of trading desires for greater equity in performance expectations, for improved service delivery that brings greater satisfaction among clients, and work process efficiencies to make getting it done easier, more personally satisfying, so consequences and rewards are expected outcomes.

Yes, folks still resist change. And those questionable performers who have fallen into the complacency of a non-accountable workplace are resisting in dysfunctional ways. Changing the culture is hard. It cannot emerge wholesale from the culture as it exists, we have discovered.

*Jeraldine McCray, Associate
VP for Facilities Services
Karen Zaugg, Director*

Jeff Marsee responds:

Bravo for catching the essence of the article.

Your comments regarding not letting the culture dictate the institution's agenda is an important point. I applaud your efforts to take on a continuous and thoughtful long-term change effort at your university.

As you know, it is unusual for university leaders to stay on task long enough to change the culture. Your long-term commitment to the process is wonderful and you should be proud of your successes.

What you may read in the future columns is an attempt to assist leaders who want to implement long-term change without doing damage to their organization or their careers.

When the culture needs to be changed the long-term commitment should be made, as it was with you, with the understanding that it requires major and long-term effort.



Annual Meeting

Preview: Climbing the Peak – Setting a Higher Standard

April 20—23, 2003

Welcome to the 64th Western Association of College and University Business Officers' Annual Meeting. The theme for this year's meeting is "*Climbing the Peak – Setting a Higher Standard*" - a reflection of our complex environment and ways in which we all work to provide services to the campus communities. You and your many colleagues will have the opportunity to meet each other, talk about issues and solutions, and gain knowledge from the many excellent presentations that have been organized for your benefit.

The Host and Program Committees, and Information Exchange have been working long and hard to put on an outstanding event that you will long remember. Our volunteers are wonderful, aren't they?

The Host Committee, chaired by Alan Chambers from the University of Calgary, has done an outstanding job of organizing volunteers to provide social events, meals, and entertainment that reflect the warmth and generosity of Canada's wonderful people.

The Program Committee, headed by Sally Roush from San Diego State University, is responsible for the conference's theme and high caliber speakers and programs, making the time you spend on your professional development at Banff well worth it. This year we've emphasized Tales from the Front – presentations featuring great ideas that have been implemented by your peers. Attend the sessions and see if you can apply any of these solutions to your workplace.

I want to thank Information Exchange for bringing so many partners to the meeting this year so we can become more familiar with their tools and products. One of the opportunities that I look forward to each year is meeting our exhibitors and sponsors, business partners who are serving our institutions. Vendor booths will be open at various times throughout the meeting and there will be an occasional drawing or two – so don't be a stranger. Our exhibitors are happy to support this program and to have the opportunity to meet you to discuss how their products might be a solution for you.

On behalf of the entire WACUBO Board of Directors, welcome to Banff for this outstanding meeting. I'm looking forward to talking to each one of you while you are here.

Warm regards,

Sandra Lier
University of Washington
WACUBO President



It is a pleasure for the 2003 Host Committee to welcome you to the 65th Annual Meeting being held at Banff, Alberta Canada. A place for those seeking unspoiled wilderness, wild animals and the tranquility of high alpine meadows filled with flowers (weather permitting). The glaciers that once covered the Canadian Rockies retreated long ago, but left behind their unmistakable beauty in the jade green lakes, unusual gorges, canyons and rock formations evident throughout Banff National Park.

All the elements of heaven surround two townsites that offer every earthly delight – fine accommodations, shopping, dining, sports, leisure activities, nightlife, arts, and culture. Banff and Lake Louise offer a natural richness that is becoming increasingly rare.

In keeping with the theme for this year's conference "*Climbing the Peak – Setting a Higher Standard*," Banff is located 1397 meters or 4583 feet above sea level. Banff National Park is a unique preserved and protected World Heritage Site, it is virtually the same sight that greeted explorers, mountain climbers and adventurers when they came to the Rockies from around the world more than 100 years ago.

The Easter weekend kicks off our 65th annual conference in one of the most sought out resort areas of the world. The historic Fairmont Banff Springs Hotel - a castle in the mountains - will be our conference hotel. Not only are we looking forward to an outstanding conference, but also hopefully this will provide an opportunity for everyone to catch their breath and soak in the sites and sounds of Canada's first national park.

We hope that you will come to Banff and enjoy your stay at the "castle"! This mountaintop experience should give us the will to press on towards the higher standards we set.

Sincerely,

Allan Chambers
University of Calgary
Host Committee Chair



Annual Meeting

Head To Canada This Spring for Our 65th Annual Meeting!

If you've been waiting and saving your conference dollars for the right program, then have we got a conference for you! WACUBO's 65th Annual Meeting is packed with a top-notch program, great events, and a location that is breathtaking!

This year, we're heading to Alberta, Canada, to the fabulous Fairmont Resort in Banff Springs. The Fairmont is one of the world's top destinations, and with a little bit of luck... actually in all probability... we'll get to see it at its snowy best! Whether you are an outdoor aficionado, or prefer the cozy warmth of a roaring fire while catching up on your reading, the Fairmont has a nook with your name on it!

This hotel has it all. Combined with the great WACUBO negotiated rate for the rooms, and the Canadian dollar exchange rate, you'll be wanting to extend your stay beyond the meeting to take it all in! But make your reservations early. This is one meeting that we're sure will sell out quickly!

Complete registration details are available on our web site at www.wacubo.org.

Early bird registration (before March 6, 2003) is \$425 U.S.

After March 6, 2003 registration is \$475 U.S.

Non Members, \$525 U.S. Guest(s) \$180 U.S.



The Fairmont Banff Springs Hotel has provided 4 different room options for this year's conference, all based upon the room size. *See note below for additional applicable fees.*
WACUBO

RATES:

1. Fairmont Room 185 sq. ft. \$215 Cdn. or about \$134 U.S.
2. Fairmont Deluxe 210 sq ft. \$255 Cdn. or about \$158 U.S.
3. Banff Premier Room 260 sq. ft \$295 Cdn. or about \$183 U.S.
4. Junior Suite 305 sq. ft. \$335 Cdn. or about \$208 U.S.

There are also one and two bedroom suites available.

NOTE: ALL room prices will also have an \$8 (Cdn) fee per night, per person added for portorage/housekeeping, eliminating the need for tipping while at the resort. This fee will be included in your reservation confirmation. In addition, Canadian General Services Taxes (GST) will be added to the final bill. In many cases, US citizens can apply for a refund of these taxes.



WACUBO's 65th
Annual Meeting

The Fairmont Resort in Banff Springs

April 20 — April 23, 2003

*“Climbing the Peak –
Setting a Higher Standard”*

Beginning Jan. 6, 2003,

**Register on-line at:
www.wacubo.org**

Hotel Address:

The Fairmont Banff Springs,
405 Spray Avenue,
Banff, Alberta, Canada T1L 1J4
Telephone (403) 762-2211



Annual Meeting

The Program - Dynamic Experts Setting a Higher Standard!



Michael Josephson
(Keynote Speaker)
President
The Josephson
Institute of Ethics

No institution can afford unethical behavior. Yet scandals, and the cynicism they breed, are everywhere. An honest workplace is the only defense. Michael Josephson will prepare WACUBO participants to lead their organizations to higher ground.



Dave Rodney
Adventurer, Writer,
Film Maker
Speaking on
Strategic Foresight

Dave Rodney knows how to confront challenges and live life to the fullest! He is a dynamic and empowering motivator who shares his "Everest Lessons" – refreshing insights on the secrets to scaling your own summits.



Beverly Ledbetter,
Vice President and
General Counsel
Brown University

Ms. Ledbetter will address us on the latest, most enduring and/or most dreaded legal

issues that should be of interest to university business officers.



Rebecca Adair, Risk
Manager
Iowa State
University
Rick Schlegel,
Senior Claims
Counsel
United Educators

What every business officer needs to know about international programs to ensure that the institution's resources are adequately safeguarded.



Dr. Michael K. Townsley, President
The Pennsylvania Institute of
Technology

Academics, finance, student services, and marketing must work hand-in-glove. Strategic success depends on how well a college is able to deliver services in response to student expectations.



Paul E. Bissonnette, Vice President,
Finance and Administration
University of San Diego
William F. Devine, Jr.,
Miller Starr & Regalia

Steve Mathews, Vice President, Finance
and Administration
University of California, Office of the
President

As housing costs near your institution soar, how can you recruit and retain faculty without abandoning fiscal prudence?

Georgia Harper, Manager,
Intellectual Property Section
The University of Texas System - Office
of General Counsel
Adam Cochran, Intellectual Property
Counsel
California Institute of Technology

The electronic environment has increased the risk of copyright infringement, but there are effective strategies institutions can employ to better manage their risks.

Lewis Murray, Vice President for
Administrative & Fiscal Affairs
Florida A & M University

Minority serving institutions face unique and challenging issues of funding and financing to meet their primary mission.

David Russ, Treasurer and Vice
President for Investments
University of California, Office of the
President

Investing in the new millenium: The challenges of asset management for Higher Education

Marilyn McMillan, Chief Infor-
mation Technology Officer
Information Technology Services
Business Continuity Redefined: Lessons
Learned in New York City

TALES FROM THE FRONT:

Combining Leadership with Financial Strategic Planning

Irene Moszer and Bill Ray, of Pacific University

Moving the Budget Process Beyond Automation

*Jacalyn Askin and Daniel Soza, from Pima
Community College*

Risky Choices:

Comparing Endowment Payout Policies

*Tim Warner and Rick Biedenweg of Stanford
University*

Managing Business Risk:

Are Your Processes Under Control?

*Bent Nielsen and Bob Clemmons of The
University of California, Irvine*

Workplace Violence, Lessons Learned

*Vicky M. Peltzer, Chief of Police, of The
University of Washington*



Information Exchange Program

Vendors Respond to Canada's Call

by Susan Geiss and Linda Stewart

Get ready for a Canadian adventure at the 2003 WACUBO Annual Meeting in spectacular Banff Springs! The Fairmont Banff Springs, nestled in Banff National Park, is set to provide elegant resort facilities and amenities with spectacular views of the Canadian Rockies. Save the date to network with your colleagues and share in excellent programs and business opportunities at the 2003 meeting from April 20 through April 23, 2003.

The Information Exchange Program is conveniently located in the Van Horne Ballroom adjacent to the conference meeting rooms and is scheduled so you may discuss your business needs with a variety of exhibitors. Already committed to participate as exhibitors or sponsors are the thirty-five companies listed below who offer expertise, programs and services across a broad spectrum of the higher education marketplace.

Golf season will still be a month off during our time in Banff, but Sunday's event will have even more universal appeal – a gondola ride and brunch! The Sulphur Mountain gondola, convenient to the hotel, is an eight-minute ride to the peak from which you can overlook the Town of Banff, see mountains stretching forever, and get a spectacular view of the hotel and Bow Valley. Be sure to check your registration materials for this separately ticketed event.

You'll have your feet back on the ground in plenty of time for the Information Exchange Program opening Sunday afternoon — special treats will initiate an annual meeting full of professional development opportunities, information sharing and fun activities.

We offer special thanks again to WACUBO's platinum partner, **Follett Higher Education Group**, for sponsoring the Sunday opening event where a *Taste of Canada* will kick off your Canadian adventure. And don't forget to join friends at the favorite Monday night hospitality event, *Sweets in the Suite* — another WACUBO Annual Meeting

signature event, sponsored by Scott Deaton and Follett Higher Education Group.

Once again, this will be an Annual Meeting you won't want to miss. Save the date for Banff!

Vendors participating in this year's annual meeting (and the list keeps growing!):

Academic Management Services
AcquireX
Adams Consulting Group
Affiliated Computer Services (AFSA)
AIG VALIC
Allen & O'Hara
American Appraisal Associates
Bank of America Southern California
Treasury Management Services
Barnes & Noble College Bookstores
Bearing Point, Inc (KPMG Consulting)
Bon Appetit
Capstone West
Chartwells Educational Dining Services
Communication Excellence Institute
Datatel
E J De La Rosa & Co
ECCI
FACTS
Follett Higher Education Group
GE Capital Public Finance
George K. Baum & Co
KeyBank
Moody's Investors Services
Morgan Stanley
Payden & Rygel Investment Counsel
Perceptive Vision
Richey Systems
SCT
Solver USA
SSC Service Solutions
Student Advantage
TIAA
Tuition Management Systems
Union Bank
WTC

Special Events

by Linda Beckman

"A Unique Taste of Canada"

Your journey to WACUBO 2003 has already awakened your senses... beginning with the sights, smells and sounds of the rugged, yet stunning Canadian Rockies and the historical Banff Springs Hotel. On opening evening, it is your taste buds' turn! *"A Unique Taste of Canada"* is the hotel's signature event – a tantalizing sampling of Canadian cuisine from coast to coast. As you make your way around the room, you'll enjoy an outstanding presentation of display cooking from 5 regions... featuring "The Best Of" from the Maritimes, Quebec, the Prairies, the Pacific Coast and the Territories. The selections will be endless... you might try Sauteed Newfoundland Cod Cheeks, Roasted Rack of Lamb in Maple Mustard Crust, and Caribou Medallions, to name a few. To top it all off, savor desserts from coast to coast... try Maple Mousse, Saskatoon Berry Pie and more! This evening will be sure to send your taste buds jumpin'!

"Climbing the Peak – Setting a Higher Standard"

Mountaintop experiences serve to sustain us during our day-to-day lives. Top off your peak experiences at the conference with an elegant evening in a setting amid the stunning and timeless Canadian Rockies. Stake your territory on the dance floor to the sounds of "TR3", long established as one of Western Canada's premier dance bands. These experienced pros shaped and honed their R&B based sound in the clubs of Calgary, Banff and Canmore. Strong vocals, backbeat and instrumentation characterized their instantly successful sound.

"An Inspiration of Native Culture"

Experience a culture that's been kept vibrant for centuries. The indigenous people of this region of Canada will offer a glimpse of their culture through performance. From an inspiring aboriginal dance performance by a group of 20 native children, to the ceremonial beat of native drummers, to the agility of an internationally renowned hoop dancer. The diverseness of cultural traditions will enrich our perspectives.



Institutes

Tickle Me, ELMI!

by Bill Pickens

You've heard of the toy, *Tickle Me Elmo*[®]; but have you considered letting the ELMI tickle your career? The Executive Leadership and Management Institute is an intensive experience for those willing to devote seven solid "total immersion" days in toward their development as influential leaders in higher education. The ELMI stresses cutting-edge issues and strategy skills more than a mastery of information about administration or ideas found in traditional management courses. The ELMI will "tickle your brain" about:

1. Understanding your role as an administrator and a leader. Seeing yourself as others do and understanding the different roles necessary to be effective.
2. Improving your skills in strategic thinking and effective action. Setting realistic goals, solving problems early, communicating clearly, anticipating the responses of others, delegating well, maintaining perspective, staying flexible, understanding the politics on campus, evaluating progress realistically.

The ELMI emphasizes in-depth discussion of issues, with time to explore and reflect. It offers time away from the daily grind so that the ideas and lessons can "soak in." The total immersion format allows everyone to get to know other participants and the faculty in ways that are not possible through brief contacts. The format is rigorous, bombarding everyone with lots of ideas and breaking down barriers to honest exchanges.

The Institute's class sessions are organized around situations which, over the long-term, will make or break your career and effectiveness as a leader. These sessions deal with challenging and problematic situations, where successful navigation requires practiced skill and clear purpose.

This Institute has a unique and specialized role:

We emphasize skills rather than mastery of a body of information about administration;

We use a variety of formats: lecture, round-table discussions, demonstrations, case studies, video-taping, one-on-one analysis;

We stress cutting edge issues and forward thinking, not those concepts which are well known, well accepted, or purely philosophical.

We place a high priority on participants getting to know and work with each other. Sessions and meals are designed to foster new relationships.

We place a priority on keeping participants involved in the Institute through continuing contacts: E-mail, follow-up evaluations, and alumni events.

Read more about the ELMI at www.wacubo.org, or contact:

Dr. William Pickens (whpickens@aol.com)
ELMI Director
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Make a New Year's Resolution

by Monica Boulay

Do your 2003 resolutions include the determination to exercise your brain, spirit and body? Fulfill these pledges to yourself by attending the 47th WACUBO Business Management Institute at Santa Barbara.

Scheduled for August 3-8, 2003, at the University of California, Santa Barbara, the Institute will draw 300 higher education managers, supervisors, staff and other mid-level personnel who perform administrative and business functions for the institution. It is also beneficial for anyone who is new to higher education; senior-level administrative officers and Institute graduates may attend the Continuous Learning program. Gain a week of in-depth professional development while enjoying the wonderful oceanside campus and the legendary hospitality of UCSB. Hear about your colleagues' innovative ideas and add insights to refresh your skills and invigorate your career.

The Institute's four-year progressive curriculum offers an opportunity for mid-level professionals to update technical skills, develop and improve management techniques, hear the latest on the critical issues and meet new colleagues. In Years One and Two participants take core courses in the morning and choose from an extensive offering of electives in the afternoon. They can customize their professional development by selecting a variety of topics, or design a track specific to their area of interest or responsibility.

Year Three students use the case study methodology to discuss current issues and difficult situations that occur on campus. Meeting in small groups with a faculty facilitator, students work closely with each other to explore campus challenges and search for novel solutions. The case study sessions are coupled with presentations on timely issues in management and administrative topics.

Year Four focuses on the evolving issues in higher education, emphasizing leadership, change in business and institutional practices and strategic planning. Participants will explore the tremendous impact that technology and other issues will have on all aspects of business functions and higher education administration. Small group discussions, a panel of experts and critical topics in higher education will be offered.

The Continuous Learning program is designed for Institute graduates and senior-level administrators who are seeking a challenging professional development experience with higher education colleagues. Participants can add on extra days, returning to hear favorite faculty and take courses from the four-year Institute curriculum.

Evening special events provide fun and relaxation. This August, join your colleagues for professional development in the beautiful, relaxed and informal Institute setting at the University of California, Santa Barbara. For information contact Monica M. Boulay, Institute Director, at 520-298-8680.



Professional Development

PD Offerings Break New Ground in Curriculum

Watch our website for details and register for the following spring classes

The CEO and the CBO: Making Sure that Relationship is Strong”

Friday, February 28, 2003,
9 AM to 4 PM
Los Angeles, CA (Location to be announced)

Hosts:
William Pickens, whpickens@aol.com
Jerry Patton, jpatton@palomar.edu

There are no working relationships more important to the success of a campus administration than the one between the President/CEO and the Chief Business Officer (CBO). This interactive seminar is designed for current CBO's and those aspiring to that position who want that relationship to be strong and productive.

Through personal testimonials, discussion, and case studies, this seminar will answer the following questions:

- What does a President/CEO expect from a CBO?
- What can a CBO do to foster a positive relationship?
- What is the most effective role of the CBO among senior staff on campus?
- How should the CBO relate to the provost or chief academic officer?
- How should a CBO deal with a new President?

Workshop Fee: \$125
After 2/7/03 \$150

Investment and Debt Concepts for Colleges and Universities

Monday, March 3, 2003
8:30 AM to 12:30 PM on Tuesday, March 4, 2002
Phoenix, AZ

Hosts:
Jennifer Taylor,
Jeff West,

Ronnie Elliot ronnie.elliott@pcmail.maricopa.edu,
602-285-7417



New Offering! The workshop will present fundamental concepts and practical information related to short- and long-term investment management, debt issuance, debt administration, and preventing fraud in the treasury system.

The workshop is appropriate for anyone responsible for these functions, or anyone seeking a broad familiarization with related concepts and terminology, including the roles and responsibilities of the parties involved in investment management, endowment management or debt financing. Offered in conjunction with the Treasury Institute for Higher Education

Presenters:
Toni Habegger,
Eastern Washington University
Jon K. Speare, Commonfund
Tom Van Zant, Commonfund
Christine Maxwell, G. K. Baum & Co.

Workshop Fee: \$250
After 2/17/03, \$275

Introductory & Intermediate College & University Accounting

(2 unique sessions)

May 2003
(details to be announced)
Portland, OR

Hosts:
Beth Barker, Beth.Barker@orst.edu
Jennifer Taylor, jctaylor@nmsu.edu
Jeff West, jeff.west@domail.maricopa.edu

The Introductory workshop, presented by Jim Dunkelmann and Rick Allen, will provide participants with an introduction to college and university accounting concepts and the basic format used by these institutions in their financial statements. The curriculum emphasizes the common issues and practices between public and private institutions. The Introductory workshop is appropriate for both people new to a college/university accounting position and those interested in an overview of this general area.

The Intermediate workshop expands upon this material, and is appropriate for those who have attended the Introductory workshop, and/or those with experience in this area seeking an expanded overview of common issues and areas of responsibility, as well as an update on current related topics

Presenters:
Beginning: Jim Dunkelmann, The Claremont Colleges
Rick Allen, Utah State University
Intermediate: John Gardner, Brigham Young University
Jeffrey West, The Maricopa Community Colleges

Workshop Fee: \$250
After 4/30/03, \$275



Ten Steps for Implementing Change

Utilizing Change Missionaries and Agents

By Jeff Marsee

This month's column identifies the second and third steps that a leader should consider for successful implementation of sustained organizational change. The first step, aligning the leader's decision making style with the organization's culture, was reviewed in last month's column. Properly utilizing the change participants adds another dimension to the human relations factor for change. Readers are encouraged to respond to Jeff Marsee, (jamarsee@aol.com) with questions about information in this column. Selected responses will be included in subsequent columns. Confidentiality will be respected when requested.

The second and third steps to successfully implement sustained change includes:

2. Not overusing "change missionaries;" and
3. Protecting "change agents."

Both strategies require that leaders skillfully utilize the staff resources in the change initiative. Staying focused on the human relations part of the change equation helps increase a successful outcome.

Change missionaries are those persons who are willing to step away from the status quo and place their efforts towards a change in their organization. They believe that directed change is necessary and that an expected outcome will improve their organization. Change missionaries provide the muscle to get the work done.

Change leaders typically do not want to gamble with untried or seemingly apathetic staff. They tend to repeatedly call upon the same doers. But even missionaries burn out, tire of being under-compensated, and ultimately become ineffective in managing both ongoing operations and change initiatives.

While it is an effective strategy to have experienced missionaries on a change project, there should also be included a mix of new talent and promis-

ing missionaries. By asking proven missionaries to identify others who are ready for additional experience and exposure, an organizational mentoring system can be created.

Closely watching missionaries in the organization can also result in the identification of hidden leadership talent. While a change initiative was underway, a university President noticed that an unassuming Associate Dean continued to quietly resolve otherwise project stopping conflicts. Seeking further information about the behind-the-scenes person, she discovered that this change missionary had a tremendous reputation for getting things done, quietly. She also learned that he had greatly respected leadership skills. He wasn't afraid to lead, and he wasn't afraid to work. He just didn't want (need) to be in the spot-light. A year later, when the opportunity presented itself, the President promoted the quiet effective leader to become the Vice President for Student Affairs.

Change Agents are individuals who believe that they must initiate action to improve organizational effectiveness. They thrive in an environment where change is the norm. In fact, they will create change if it is not the norm. This often puts them at odds with the organization's *culture keepers*—see Change Step #1.

As self-starting problem solvers, these high task oriented employees are often promoted into managerial positions before their people skills have matured. Often making enemies on the way up, and finding themselves not ready to successfully manage others, they can exasperate a change process by initiating change too quickly or without creating a good base of support. Change agents can be in extreme professional risk if the leader is not willing to guide them. Yet, without change agents, organizations go stale and lack the initiative to create wide-based improvement and change efforts.

The tendency to overuse change agents may be the downfall of a leader's

efforts to implement continuous change. Consistently placing these important organizational assets on the front line of change can result in the agents getting beat up by the peers they have been promoted past and the superiors they may be challenging. To avoid change agent burnout, or premature organizational mortality, leaders must clearly set the agenda for change. A successful change leader must take personal responsibility for initiating change and make it clear that obstructionists will be reassigned and replaced by people who understand the importance of the change agenda. Leaders not willing to take a clear and visible stand against obstructionists should stay clear of the change agenda.

A successful change leader will understand that building a strong base for continuing institutional change means looking deep into the organization's talent pool. Finding and then properly utilizing the sometimes quiet talent, or mentoring the explosive change initiators, is a critical factor for successfully creating a continuous change environment.



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.



WACUBO Calendar:

Upcoming Events:

2003

January 31	WACUBO Board Planning Retreat — Newport Beach, CA
February 28	The CEO and the CBO — Los Angeles, CA
March 3-4	Investment Debt Management — Phoenix, AZ
May	Introductory College and University Accounting — Denver, CO
May	Advanced Fund Accounting — Denver, CO
April 20 - 23	WACUBO Annual Meeting — Banff, Alberta, Canada
July 21 - Aug. 1	Executive Leadership and Management Institute — Stanford University
July 26 - 29	NACUBO National Meeting — Nashville, TN
July 28 - Aug 2	EACUBO Administrative Management Institute — Cornell University
August 3 - 8	Business Management Institute — Santa Barbara, CA
October 6 - 8	EACUBO Annual Meeting — Philadelphia, PA
October 12 - 15	CACUBO Annual Meeting — Columbus, OH

February 24, 2003 deadline for submission of articles for WACUBO's Spring Newsletter

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