

No Limits

WACUBO



May 4-7, 2014
Las Vegas

2014 Conference Program



WESTERN ASSOCIATION *of*
COLLEGE AND UNIVERSITY BUSINESS OFFICERS



EARN CPE Credits

WACUBO's professional development offerings are consistently recognized for delivering high quality and relevant programs. As a result, attendees of the 2014 Annual Conference will be eligible to earn an estimated 15.5 CPE units.

Thank you to JW Marriott Las Vegas Resort & Spa for providing the photos for this brochure.

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Things to do in Las Vegas



Hotel Property: JW Marriott Las Vegas Resort & Spa is located in Summerlin, Nevada, minutes away from the action of the Las Vegas Strip.

The resort is home to Spa Aquae, eleven dining options and Rampart Casino on-site, and a golf concierge.

Visitors enjoy nine championship golf courses, the nearby famous Las Vegas Strip, shows, restaurants and entertainment.

Hike trails, climb cliffs, mountain bike, horse-back ride, or drive through the Red Rock National Park. Then relax and unwind in one of 300 natural hot springs.

Tour the Ethel M. Chocolate Factory or the Hoover Dam. See Lake Mead or the Las Vegas Speedway, Death Valley, Bryce Canyon and Valley of Fire State Park. Visit Spring Mountain Ranch. And, don't miss the Richard Petty Rookie Driving Experience.

For something out of the ordinary, try the Colorado River Tour or the Las Vegas Night Flight Helicopter Tour.

WACUBO 2014 CPE SESSIONS	LOCATION	DATE	START TIME	END TIME	CPE CATEGORY	CPE UNITS
Sal Khan on Higher Ed and Financial Literacy	Marquis 4 and 5	5/5/14	8:30 a.m.	9:45 a.m.	Business Management and Organization	1.5
To Infinity & Beyond – Innovations in Higher Education Strategic Treasury Management	Marquis 8	5/5/14	10:45 a.m.	12:00 p.m.	Management Advisory Services	1.5
Bringing Transparency and Sanity to Institutional IT Spend	Marquis 2 and 3	5/5/14	10:45 a.m.	12:00 p.m.	Management Advisory Services	1.5
New Accounting Guidance from FASB and GASB	Marquis 1	5/5/14	10:45 a.m.	12:00 p.m.	Accounting (Governmental)	1.5
Establishing and Growing a Tech Transfer/IP Licensing Program	Cataluna A and B	5/5/14	10:45 a.m.	12:00 p.m.	Social Environment of Business	1.5
Tales From the Front – Using Tuition Elasticity to Forecast Enrollment	Marquis 6 and 7	5/5/14	10:45 a.m.	12:00 p.m.	Business Management and Organization	1.5
National Update from NACUBO & WACUBO Business Meeting	Valencia	5/5/14	12:00 p.m.	1:15 p.m.	Business Management and Organization	1.5
The Impact of the Affordable Care Act on Student Health Insurance Plans and the Potential Legal Implications of Self-funding	Marquis 1	5/5/14	2:00 p.m.	3:15 p.m.	Business Law	1.5
Ethical Leadership in Higher Education	Marquis 2 and 3	5/5/14	2:00 p.m.	3:15 p.m.	Behavioral Ethics	1.5
Lean-ing Higher Education	Marquis 6 and 7	5/5/14	2:00 p.m.	3:15 p.m.	Administrative Practice	1.5
Breaking Bad (Habits): Engaging Faculty through Quantitative Modeling	Cataluna A and B	5/5/14	2:00 p.m.	3:15 p.m.	Communications	1.5
Economic Update and Fiscal Issues along with an articulation of the Value Universities Provide to Regional Economies	Marquis 4 and 5	5/5/14	3:30 p.m.	4:45 p.m.	Economics	1.5
Whose Business is it Anyway?	Marquis 4 and 5	5/6/14	9:00 a.m.	10:15 a.m.	Management Advisory Services	1.5
Adopting New Learning Technologies	Cataluna A and B	5/6/14	11:00 a.m.	12:00 p.m.	Management Advisory Services	1
Interest-Based Negotiation	Marquis 2 and 3	5/6/14	11:00 a.m.	12:00 p.m.	Personnel/HR	1
Understanding Cost Per Course And How To Calculate It	Marquis 6 and 7	5/6/14	11:00 a.m.	12:00 p.m.	Mathematics	1
Maintenance Management System Implementation	Marquis 1	5/6/14	11:00 a.m.	12:00 p.m.	Management Advisory Services	1
Lifetime Income – Why it's important, difficult for participants to understand and solutions for the future	Marquis 8	5/6/14	1:45 p.m.	2:45 p.m.	Administrative Practice	1
Communicating Financial Information	Marquis 2 and 3	5/6/14	1:45 p.m.	2:45 p.m.	Communications	1
Strategic Performance Measurement in Public Higher Education: Informing decision making, improving results, and demonstrating value	Marquis 6 and 7	5/6/14	1:45 p.m.	2:45 p.m.	Social Environment of Business	1
Tattoos, Piercings, and Gender Identity Issues in the Workplace	Marquis 1	5/6/14	1:45 p.m.	2:45 p.m.	Personnel/HR	1
One Stop-Integrated Enrollment Services	Cataluna A and B	5/6/14	1:45 p.m.	2:45 p.m.	Specialized Knowledge and Applications	1
Edifying Leadership: A Call to Empower, Build, and Strengthen	Marquis 4 and 5	5/6/14	3:45 p.m.	5:00 p.m.	Personal Development	1.5
Inventing the 21st Century Institution: Innovation and Economic Engagement	Marquis 4 and 5	5/7/14	8:45 a.m.	10:15 a.m.	Administrative Practice	1.5
The Element; How Finding Your Passion Changes Everything	Marquis 4 and 5	5/7/14	10:15 a.m.	11:30 a.m.	Personal Development	1.5

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour. All program components have been designed such

that no prerequisites are required and all offerings are appropriate for all learning levels.

WACUBO 2014

REGISTRATION

Location:	Grand Foyer
Friday	10:00 a.m. – 3:00 p.m.
Sunday	8:00 a.m. – 4:30 p.m.
Monday	7:00 a.m. – 4:30 p.m.
Tuesday	8:00 a.m. – 4:00 p.m.

EARN CPE Credits

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EXHIBITS-VENDOR AREA

Location:	Grand Ballroom
	Most sessions, hot and cold beverages will be served and usually food or snacks.

Please join us for the following Information Exchange events!

Sunday	2:30 p.m. – 4:00 p.m.	Opening Event and Ice Cream Social
Monday	7:00 a.m. – 8:15 a.m.	Continental Breakfast
	9:45 a.m. – 10:45 a.m.	Break
	1:30 p.m. – 2:15 p.m.	Dessert with our Partners
	4:45 p.m. – 5:45 p.m.	Wine and Cheese Reception
Tuesday	10:15 a.m. – 11:00 a.m.	Continental Breakfast
	3:15 p.m. – 4:00 p.m.	Break and Prize Drawing

The Las Vegas Strip: Lights and action, and yes, simply 'excitement' — that's all that is needed to describe the Las Vegas Strip. Gambling is not all that is available to the discriminating guest. Visit Bellagio Gallery of Fine Art, Madame Tussauds Las Vegas, the Eiffel Tower Experience, and the Fremont Street Experience. Take gondola rides at the Venetian, visit the lion habitat at The MGM Grand Hotel & Casino, ride the roller coaster at New York – New York and visit a secret garden and a dolphin habitat!



WACUBO 2014 Schedule

FRIDAY, MAY 2

10 a.m. – 4 p.m. WACUBO BOARD MEETING
Murcia

SATURDAY, MAY 3

9 a.m. – 3 p.m. PRE-CONFERENCE WORKSHOP—
cataluna
EMBRACING THE UNKNOWN: CHALLENGES FACING THE UNIVERSITY BUSINESS OFFICER

Registered Participants \$25 (includes lunch and materials)

Join us for an interactive workshop which focuses on developing leadership strategies to address some of the major challenges facing higher education institutions—especially small institutions.

Speakers and participants will identify and develop an understanding of the issues facing higher education and develop leadership strategies to address and move organizations through the adaptive challenges of being a business officer in a complex and changing environment.

10 a.m. – 3 p.m. REGISTRATION
grand foyer

10 a.m. – 3 p.m. CYBER CAFE
grand foyer
Sponsored By: ARAMARK

SUNDAY, MAY 4

6:30 a.m. – 1:30 p.m. GOLF TOURNAMENT at TPC Las Vegas
TPC
7:30 a.m. SHOTGUN START
Sponsored By: Johnson Controls

8 a.m. – 4:30 p.m. REGISTRATION
grand foyer

8 a.m. – 4:30 p.m. CYBER CAFE
grand foyer
Sponsored By: ARAMARK

2 p.m. – 4 p.m. INFORMATION EXCHANGE PROGRAM OPENING EVENT
grand ballroom

2:30 p.m. – 3:30 p.m.
grand ballroom

INFORMATION EXCHANGE/
ICE CREAM SOCIAL

Sponsored By: ABACUS

5 p.m. – 6 p.m.
marbella

NEWCOMERS RECEPTION

6 p.m. – 10 p.m.
springs Preserve

OPENING RECEPTION & DINNER AT SPRINGS
PRESERVE

Sponsored By: Follett

Welcome and please join us for the opening event to the 2014 Annual Conference at the Springs Preserve. Listed on the National Register of Historic Places since 1978, the Springs Preserve is a 180-acre cultural institution designed to commemorate Las Vegas' dynamic history and to provide a vision for sustainable future. The Preserve features museums, galleries, outdoor events, colorful botanical gardens and an interpretive trail system through a scenic wetland habitat. Before it opened to the public in June 2007, the Preserve was home to many other Southern Nevadans over the past centuries. You will experience the characteristics from the early history of the Pueblo people, Patayan and Paiutes who used the Springs until Anglo-European settlers began ranching in the valley in the 1860s to the urban pressures of the present time. Also on the premises, you will be able to visit and explore the Origen Museum. This museum captures the essence of the land, the early inhabitants and the many possibilities for Las Vegas' future. When wandering through the museum, you will experience three galleries featuring more than 75 exhibits, an indoor theater displaying documentary films, multimedia historical recreations and live animal habitats. We hope you set aside this time to grab an opportunity to learn another side of Las Vegas. We look forward to seeing you at the Preserves!

MONDAY, MAY 5

7 a.m. – 4:30 p.m.
grand Foyer

7 a.m. – 4:30 p.m.
grand Foyer

7:30 a.m. – 8:15 a.m.
grand ballroom

8:15 a.m. – 8:30 a.m.
marquis ballroom
salons 4 & 5

8:30 a.m. – 9:45 a.m.
marquis ballroom
salons 4 & 5

9:45 a.m. – 10:45 a.m.
grand ballroom

REGISTRATION

CYBER CAFÉ
Sponsored By: ARAMARK

INFORMATION EXCHANGE CONTINENTAL
BREAKFAST
Sponsored By: Barclays

WELCOME ADDRESS FEATURING
DR. MICHAEL D RICHARDS, PRESIDENT
OF THE COLLEGE OF SOUTHERN NEVADA

KEYNOTE SESSION I
Sponsored By: Bank of America Merrill Lynch
Higher Education and Financial Literacy
Salman Khan, Founder Khan Academy

Sal Khan will describe the ideal role of higher education with a focus on student success and outcomes as discussed in his book, *The One World School House: Education Reimagined*. Khan will also address the role of business officers in improving learning outcomes as well as signaling creative ways we can harness technological advances to improve service, gain efficiency, and lower student costs. Finally, improving financial literacy—in part driven by increased student loan debt—is increasingly seen as a societal imperative. Using innovative and effective online learning technology, Bank of America and leading online educational platform, Khan Academy, have joined forces to create a free platform (BetterMoneyHabits.com) to improve financial literacy, explaining financial concepts in a simple and conversational way.

INFORMATION EXCHANGE REFRESHMENT BREAK
Sponsored By: Chartwells

10:45 a.m. – Noon
marquis ballroom
salon 8

CONCURRENT SESSION 1 – *Corporate Showcase*

Sponsored By: WELLS FARGO

To Infinity & Beyond – Innovations in Higher Education Strategic Treasury Management

Erin S. Gore Executive Vice President Co-Head Higher Education & Nonprofit Commercial Banking

JoEllyn Powell, Treasury Management Expert

*Craig Meyer, Controller,
The National Academy of Sciences*

*Rosalynn Feagins, Treasury Specialist,
University of Denver*

As institutions continue to recover from the impacts of the recent recession, many are looking for — or have found — more effective or cost-efficient business models. These have come in a variety of forms: from shared services to data driven end-to-end process improvements, integrated payment processing enhancements, and dashboard reporting, all of which has enriched strategic planning. But what are the opportunities and challenges as your university moves to a changing administrative support including shared services? What does strategic treasury management look like today as opposed to the recent past, and how do we see it evolving in the future? How does the holistic thinking about Treasury change your risk tolerance and profile? How do you communicate the benefits to your community of the efficiencies in this area? The presenters will identify strategies for creating a culture of change, driven by metrics, which make the benefits of change clear and necessary. Attendees will also learn the best practices in Strategic Treasury Management and how they can implement them within their institutions.

10:45 a.m. – Noon
marquis ballroom
salons 2 & 3

CONCURRENT SESSION 2

Bringing Transparency and Sanity to Institutional IT Spend

*Anne Milkovich (MB, CGEIT, PMP, SPHR) Associate
Chief Information Officer for Enterprise IT Governance
Montana State University*

10:45 a.m. – Noon
marquis ballroom
salon 1

In many organizations, investment in information technology is increasing, becoming the second biggest operations expenditure after personnel costs and the 2nd biggest category of capital investment after facilities (ISACA, 2007). Yet many organizations, including institutions of higher education, do not have good insight into the costs or benefits of their IT investment portfolio. IT expenditures are often distributed across units, funds, accounts, and positions. Returns on investment are not quantifiable; cost savings in labor efficiency gains are hidden.

While no silver bullets have yet been found, standards and practices are emerging that address these very common challenges. In this session, participants will learn both theory and practical application for IT investment management synthesized from frameworks and published standards of leading professional organizations in the field. Working with your colleagues in collaborative problem-solving, you will come away with increased knowledge as well as tools, tips, and techniques for implementing both immediate and long-term solutions providing better control and insight into institutional IT spend.

CONCURRENT SESSION 3

New Accounting Guidance from FASB and GASB

*Mary L. Fischer, PhD
Professor, College of Business and Technology
University of Texas at Tyler*

This session will identify and discuss new accounting and auditing pronouncements for college and university financial reporting. New projects and other changes underway at the accounting Boards will also be presented together with the implications for higher education.

Establishing and Growing a Tech Transfer/IP Licensing Program

*Sherylle Mills Englander
Director, Office of Technology & Industry Alliances
University of California, Santa Barbara*

With increasing budget pressure, many institutions are looking for new or expanded revenue sources. Technology transfer is one area that can be potentially fruitful by providing both new revenue opportunities for the university and important support to the university's governmental relations and industry outreach efforts, as well as regional economic development. However, while establishing a technology transfer can provide a potentially new revenue source, the revenue can be unpredictable and can take many years to fully develop and tension can develop along the way. The University of California, Santa Barbara founded its first campus-based technology transfer program (from scratch) in 2005. While the office remains small in terms of staff and resources, its portfolio has grown to involve over 650 technologies with licensees that range from multinational corporations to local start up efforts.

In this session, UCSB's founding director will discuss the formation of the office and the critical elements and practices used to establish a robust research commercialization program. In addition, key issues related to technology transfer programs will be discussed, such as the differences between licensing to established companies and start-ups, the unique role start-ups play in the local economy and in commercializing research, invention evaluation and marketing, the basics of licensing and common pitfalls to avoid, and tips on establishing productive relationships between the technology transfer office, the faculty and licensees it works with. There will be a particular emphasis on how to get the most "bang" when establishing a technology transfer program when only limited resources are available.

*Rebecca T. Barber, PhD
Senior Director, Management Analysis
Arizona State University
Jennifer Wilken
Director, Enrollment Analysis
Arizona State University*

Arizona State University set out to determine both the level and the changes in tuition elasticity for our students using historical data. In a cooperative effort between the offices of the Provost and the Chief Financial Officer, this analysis used 6 years of historical application data that included years during which tuition increases had been substantial as well as years during which there was no increase.

The result is a model that allows for estimating the change in enrollment for next year for different segments of the student population based on changes to either or both price-related variables.

More sensitive than a single measure of elasticity, this model includes elasticity for each sub-group of interest to our enrollment management team as well as demonstrating the effect of increased aid for those groups as a potential way to offset tuition increases for specific sub-groups.

Sponsored By: Union Bank

John Walda, President and CEO, NACUBO

Update from Washington: John Walda, President and CEO of NACUBO, along with others from NACUBO, will provide an update on current policy conversations in Washington and potential impacts on higher educational institutions.

2:00 p.m. – 3:15 p.m.
marquis ballroom
salon 8

CONCURRENT SESSION 6 – *Corporate Showcase*
Sponsored By: PFM (Public Financial Management)

Public-Private Partnerships in Higher Education

Brett Matteo, Managing Director

The PFM Group

Ellen Clark, Senior Managing Consultant

The PFM Group

Travis Linneweber, Senior Managing Consultant

The PFM Group

June Matte, Managing Director

The PFM Group

2:00 p.m. – 3:15 p.m.
marquis ballroom
salon 1

CONCURRENT SESSION 7

The Impact of Affordable Care Act on Student Health Insurance Plans and the Potential Legal Implications of Self-Funding

*Jeremy Hueth, Managing Associate University Counsel,
System Administration Office of University Counsel
University of Colorado*

Final regulations under the Affordable Care Act exclude student health insurance from most of the ACA requirements, but provide that fully insured student health insurance plans fall within the definition of “individual health insurance coverage” if they meet most of the consumer protection requirements. Over the course of exploring self-funding student health insurance plans, the University of Colorado has learned a great deal about the benefits and pitfalls under both the ACA, and the experiences of other states.

Fully insured student health insurance plans will be rated on the individual market. Over the last several years, rates on fully insured plans have increased dramatically across the country. Self-funded plans are not regulated under the ACA, but may constitute minimum essential coverage for purposes of the individual mandate. States may still regulate self-funded health plans. Approximately 30-40 institutions across 10 states offer some form of self-funded health insurance and the level of state oversight or awareness varies dramatically.

2:00 p.m. – 3:15 p.m.
marquis ballroom
salons 2 & 3

CONCURRENT SESSION 8

How Leaders Avoid Ethical Pitfalls

Marianne M. Jennings, J.D.

Emeritus Professor

Arizona State University

We see the headlines about the problems in research funding, the issues in athletic departments, and the misuse of funds. Yet, for every headline, there is a college or university, a department, and plenty of managers who avoid those pitfalls and the resulting headlines because of their commitments, examples, and clear perspectives. They understand that ethics matter in achieving long-term success. A look at the factors that keep organizations and leaders out of ethical difficulty.

2:00 p.m. – 3:15 p.m.
marquis ballroom
salons 6 & 7

CONCURRENT SESSION 9

Sponsored By: MOSS ADAMS LLP

Lean-ing Higher Education

Ruth Johnston, PhD

*Associate Vice Provost and Associate Vice President
University of Washington*

Kenneth Murphy, PhD

Assistant Dean of Undergraduate Education

Argyros School, Chapman University

This session will provide a lively and interactive opportunity to discuss the implementation of Lean principles in higher education. Participants will read a short vignette describing an operational challenge present in the academy and provide input as to potential solutions. Interventions will be analyzed from the Lean perspective. Following the discussion examples and experiences with Lean in the university setting will be shared.

An attendee of this session will gain insight into:

- Principles for Lean management
- Applying Lean to solving business process challenges in universities
- Examples demonstrating the successful application of Lean principles in higher education

2:00 p.m. – 3:15 p.m.
cataluna A & B

CONCURRENT SESSION 10 – *Tales from the Front*

Breaking Bad (Habits): Engaging Faculty through Quantitative Modeling

*Barbara Morris, PhD
Provost, Fort Lewis College*

*David Maddox
Principal, Resource Planning & Management
Associates, LLC*

In 2011, Dr. Barbara Morris arrived as Provost at Fort Lewis College; a public liberal arts college in Durango, CO. Provost Morris saw the need for quantitative tools to manage tenure track lines and set adjunct budgets to achieve the best impact in terms of student needs and success, financial efficiency, and support of the school's liberal arts identity. In this session, Dr. Morris of Fort Lewis College and David Maddox of RPM Associates will describe the impetus, context, and goals for this model, give an overview of its contents and construction, and discuss the ways FLC uses it as a management tool.

Provost Morris worked with analysts to develop a model that uses detailed, section-level data on courses, students, and faculty to provide reports and models that reveal the pressure points within the schedule and allows for an objective evaluation of relative demands for teaching resources. It allows the administration to evaluate requests for resources in light of the capacity in existing courses, and helps point to places where the schedule may contain inherent inefficiencies. This tool guides judgments about the deployment of faculty resources and uses the data and models derived from it to provide a focal point for conversations with chairs about needs in their department. The model facilitates discussion with faculty and delivers transparent tools that inform conversation rather than provide a rigid formula for decision-making.

3:30 p.m. – 4:45 p.m.
marquis ballroom
salons 4 & 5

GENERAL SESSION 1

Sponsored By: Arthur J. Gallagher

Economic Update and Fiscal Issues along with an Articulation of the Value Universities Provide to Regional Economies

*Dennis Hoffman, PhD
Director of Office of the University Economist, Arizona
State University*

Dr. Hoffman will provide an update on the economy including particular risks and opportunities for economic performance over the next several years. The presentation will also outline the role played by universities in enhancing economic development opportunities for both students and the surrounding region.

4:45 p.m. – 5:45 p.m.
grand ballroom

INFORMATION EXCHANGE —
WINE & CHEESE RECEPTION

Sponsored By: MOSS ADAMS LLP

6:30 p.m. – 8:30 p.m.

DINNER ON YOUR OWN

8:30 p.m. – 11:00 p.m.
parian

Follett's SWEETS IN THE SUITE
Sponsored By: Follett

TUESDAY, MAY 6

8:00 a.m. – 4:00 p.m. REGISTRATION
grand foyer

8:00 a.m. – 4:00 p.m. CYBER CAFÉ
grand foyer
Sponsored By: ARAMARK

8:00 a.m. – 9:00 a.m. BUFFET BREAKFAST at the JW Marriott
grand ballroom

9:00 a.m. – 10:15 a.m. KEYNOTE SESSION 2
marquis ballroom
salons 4 & 5

Whose Business is it Anyway?

*Professor Robert Zemsky, PhD
Chair The Learning Alliance University of Pennsylvania*

Checklist for Change presents two fundamental propositions for responding to calls for change across American colleges and universities. The first holds that higher education is the faculty's business. It is what faculty do and take responsibility for that will matter most. Checklist for Change's second proposition holds that the most needed change is curricular change. A college's curriculum defines what is to be taught and by whom, the order in which subjects are to be taken, and the requirements for a degree. A substantial portion of the increase in operating expenses at most colleges and universities can be explained in terms of the faculty collectively teaching (and often requiring) more subjects, but individually teaching fewer courses than before.

Given this reality—what role are Chief Business Officers likely to play in the coming struggle to change American higher education? Are you to be bystanders and observers or you can you actually become partners who join with the faculty in getting control over a curriculum that costs too much and leads to too few graduates?

10:15 a.m. – 11:00 a.m. INFORMATION EXCHANGE BREAK
grand ballroom

11:00 a.m. – Noon
cataluna A & B

CONCURRENT SESSION 12

Adopting New Learning Technologies

*Philip Regier, PhD
Executive Vice Provost and Dean
ASU Online & Extended Campus
Arizona State University
Gary Brahm
Chancellor and CEO
Brandman University*

Technology and innovation aren't new to higher education; but the proliferation of digital learning options, combined with the need to contain costs, has made the adoption and integration of technology imperative. This session will explore how one institution has developed a Competency Based Education program from the ground up with technology at its core, and how another institution has assimilated technology, both with the student and the bottom line in mind. The session will demonstrate the effect of both of these approaches on the business model and how learning outcomes have been impacted.

11:00 a.m. – Noon
marquis ballroom
salons 2 & 3

CONCURRENT SESSION 13

Interest-Based Negotiation

*Eddie Genna, Faculty Member on Special Assignment to
Chancellor
Maricopa Community College District
Rory Gilbert, Senior Manager, Human Resource
Solutions Inclusion Unit
Maricopa Community College District*

IBN was initially introduced to Maricopa Community College District as a way to approach the faculty meet and confer negotiations on a trial basis in 2009. Since then the approach has been formally adopted for that process and has also been expanded as a preferred approach to negotiations and conflict resolution throughout the district.

This session will introduce the principles of IBN, share the pros and cons of this approach in formal

negotiations and other facilitation and conciliation engagements. The presenters will share philosophical elements of the approach and examples of real world application within higher education. Participants will hear perspectives, examples, and suggestions based on real-world higher education based application of interest-based approaches.

11:00 a.m. – Noon
Marquis Ballroom
salons 6 & 7

CONCURRENT SESSION 14

Understanding Cost Per Course and How To Calculate It

Maria Anguiano
Deputy Chief of Staff, Strategic Planning and Analysis
University of California
Oakland, CA

This presentation seeks to provide US post-secondary education leaders and administrators a framework and practical guide to categorize their institutions' costs in a way that enables data-driven decisions as they look to achieve their strategic goals.

Cost per course was chosen as the fundamental building block of institutional expenses for purposes of this methodology. Courses were chosen as the unit to examine costs as they are the fundamental tenant of every institution regardless of its mission. In addition, even within the degree-granting institutions, there are hundreds of program students could take to achieve these degrees and varying times to completion. By starting with cost per course, institutions can aggregate costs to whatever level is useful to them.

The uniqueness of this model comes from the additional ability for institutions to examine their production function. While cost per course information is a starting point, it is not enough. In order to improve performance, institutions must also capture information on the educational activities performed within each course. Only with costs bucketed into meaningful course activities do institutions have the knowledge necessary to improve academic productivity. With costs grouped

in this way, course delivery transforms from being a black box fixed total dollar amount, to being broken up into its component parts and therefore something that can be redesigned and improved.

This model is intended to enable institutions to make data-driven decisions as they look to achieve their strategic goals.

CONCURRENT SESSION 15 – *Tales from the Front*
Maintenance Management System Implementation

Robert Boyd
Associate Vice President for Facilities Management
California State University Fresno

Maintenance management at the university relied on a homegrown computer application used widely throughout the California State University System. Over time, business processes evolved to the point that a new solution was required.

Many of the Fresno State's needs also stemmed from the effects of a crushing budget crisis looming over the State of California. State institutions had to adopt innovative approaches to run Lean while simultaneously preserving service quality. Through the implementation of AiM by AssetWorks, Fresno State was able to streamline processes, increase billings for work and operate a more efficient work control center.

Fresno State's purchasing model for AiM and initial development of its modules have allowed other institutions in California to purchase AiM through Fresno State and leverage the many customizations and reports specifically designed for higher education and the CSU.

MEMBER APPRECIATION LUNCHEON
Sponsored By: J.P.Morgan

11:00 a.m. – Noon
Marquis Ballroom
salon 1

Noon – 1:45 p.m.
valencia

Sponsored By: TIAA CREF

Lifetime Income – Why it's Important, Difficult for Participants to Understand and Solutions for the Future

Timothy J. Pitney

*Director, Institutional Investment Strategist
TIAA-CREF*

John D. Middlebrook

*Managing Director, Consultant Relations
TIAA-CREF*

Jamie McCrary

SageVlew Advisory Group

Market forces and the decline of traditional pensions have placed the responsibility of deriving a lifetime retirement income stream straight into the hands of participants. There are a multitude of risk factors that need to be negotiated and a variety of offerings in the marketplace aimed at helping participants achieve their objectives. But how does one decide and can we, as retirement plan stewards, help guide retirees to the right decisions? Attendees will be able to describe the continuum of lifetime income solutions that exist in the marketplace and learn of new, innovative techniques to help participants plan for the future. They will learn the six major risk factors facing pre-retirees and retirees, and how impactful any one of the risk factors can be in planning for the future. Through this, attendees will come to understand the importance of lifetime income in retirement.

Communicating Financial Information Effectively

Howard Teibel, President

Teibel, Inc.

Wayland, MA

Kelly Fox, Senior Vice Chancellor &

Chief Financial Officer

University of Colorado Boulder

The ability to communicate technical financial information to a variety of constituents, to persuade them to respond, and to possibly change their behavior, is essential for a business officer. Sometimes, that communication takes place one-on-one; sometimes it takes place before a larger audience. Whether you are communicating with faculty, staff, board members, parents or community members, the art of communicating technical data is a necessary requirement in today's work environment. Learn a variety of techniques to improve your communication, presentation and listening skills.

Learning objectives:

- Discover methods for effectively communicating and presenting financial information to non-financial constituents.
- Analyze examples and techniques of good communication and understand what makes an effective presentation.
- Become aware of the technical jargon business officers use and learn how to present data in a language that non-business office staff will understand.

1:45 p.m. – 2:45 p.m.

marquis ballroom
salons 6 & 7

CONCURRENT SESSION 18

Strategic Performance Measurement in Public Higher Education: Informing Decision Making, Improving Results, and Demonstrating Value

*Matthew Ceppi, Ph.D., Associate VP for Institutional Planning and Analysis & Chief of Staff to the President
Cal State San Marcos*

Public higher education must demonstrate its value and rebuild public trust, assure strategic use of resources, and identify actions to improve outcomes. The theories and concepts underlying performance measurement and accountability create a framework for studying and applying strategic performance management. This national study explored its application at public four-year universities, its impact on leaders' decision making and institutional effectiveness outcomes, and its alignment with state policy priorities.

The study explored the application of specific practices including: a) use of performance measurement data to develop and assess strategic priorities, b) institutional leaders using measurement data to inform day-to-day decisions, c) using performance measurement data to inform annual budget allocations, d) benchmarking against comparable institutions, e) periodically disseminating information publicly, 6) cascading measurement down through the organization, and, f) whether performance measurement is used by managers and department chairs to inform day-to-day decisions.

The study also explored whether performance measurement at public higher education institutions contributed to improved decision-making by leadership or institutional effectiveness outcomes, and whether institutions' performance measures were aligned with states' public policy priorities for higher education.

1:45 p.m. – 2:45 p.m.

marquis ballroom
salon 1

The findings reveal specific measurement areas institutions that experienced better decision making and improved institutional effectiveness outcomes were collecting data in and analyzing. It provides higher education leaders a framework to develop indicators and dashboards that inform decision-making and resource allocation, demonstrate value to the public, and foster organizational learning.

CONCURRENT SESSION 19

Tattoos, Piercings and Gender Identity Issues in the Workplace

*Irma Rodriguez Moisa, Partner
Atkinson, Andelson, Loya, Ruud & Romo
Cerritos, CA*

In the last decade employees have begun expressing their individuality in new ways. Appearances that were once considered unusual or provocative have become much more common. Concerned about the image their employees present to the public, many agencies have responded by adopting dress codes or appearance standards. There are a host of recent developments in this area, including statutory changes and appellate cases in the areas of religious and gender discrimination. This presentation will discuss these developments, provide suggestions for appropriate policies and their implementation, and cover public agencies' bargaining obligations in this regard.

1:45 p.m. – 2:45 p.m.
cataluna A & B

CONCURRENT SESSION 20 – *Tales from the Front*

One Stop-Integrated Enrollment Services

*Angie Di Claudio, Director
Integrated Enrollment Services
Azusa Pacific University*

*Stephen Fahey, Associate Director
Client Services and Marketing
Azusa Pacific University*

*Michelle Foulger, Assistant Registrar
Academic Progress
Azusa Pacific University*

In August 2012, APU launched a One Stop office integrating financial aid, student accounts and registrar services and functions. Although there were many challenges, the most significant was changing a deeply embedded culture that carried with it a particular definition of what service meant to our students and other constituents. We had to find a way to serve a growing student population without adding new staff or buildings! It was a two year process from the inception of One Stop to its launch.

Our implementation acknowledges that culture matters. Success requires establishing a unifying mission. Ours was CARE, a service philosophy that imposed the idea that all those providing service would “Choose joy, Actively listen, Resolve the issue, and Exceed expectations. There are many factors beyond the basic facility and staffing needs that make offices successful and we have found these to include: establishing leadership accountability, identifying a unifying philosophy, and promoting collaborative teamwork.

2:45 p.m. – 3:45 p.m.
grand ballroom

INFORMATION EXCHANGE BREAK and PRIZE DRAWING

3:45 p.m. – 5:00 p.m.
marquis ballroom
salons 4 & 5

GENERAL SESSION 2

Sponsored By: SODEXO

Edifying Leadership: A Call to Empower, Build and Strengthen

*Hung Le, Associate Vice President and Registrar
Pepperdine University*

Under constant pressure to “do more with less,” in an ever-changing environment filled with more and more demands from our increasing and varied constituents, we find ourselves fighting the temptation to be governed by the “tyranny of the urgent” and thus become managers of tasks rather than leaders of our organizations. This session will explore ways which we as leaders can develop our skills and use our gifts to become more effective in developing a workplace with an ethos of empowerment, building up those with whom we serve, and strengthening our institutions in our roles as leaders.

6:30 p.m. – 7:30 p.m.
the Lodge at the Lawn

ANNUAL RECEPTION

Sponsored By: **George K. Baum & Company**

Please join us at the JW Marriott Las Vegas Resort & Spa for the prelude to the Annual Banquet and Dance. This is a great opportunity to enjoy light refreshments and drinks, and to intermingle with your friends and colleagues. What a way to wind down after a full day of sessions!

7:30 p.m. – 10:00 p.m.
pool side

ANNUAL BANQUET & DANCE

Sponsored By: **Barnes & Noble College**

Come one! Come all! Let's continue to celebrate one last time with your friends and colleagues at the Annual Banquet and Dance. Listen to some great music from Las Vegas while enjoying your food, drink and conversation. For dinner, the chef combines a classic menu, modest yet excellent wine selections, beers and tasty cocktails for your pallet to appreciate. After dinner, please dust off your shoes and kick up your heels and enjoy dancing to some of the best performers that Las Vegas has to offer.

WEDNESDAY, MAY 7

7:30 a.m. – 8:15 a.m.
Murcia

BOARD OF DIRECTORS MEETING

8:00 a.m. – 8:45 a.m.
valencia

BREAKFAST BUFFET

Sponsored By: STANDARD & POOR'S

8:45 a.m. – 10:15 a.m.
marquis ballroom
salons 4 & 5

GENERAL SESSION 3

Inventing the 21st Century Institution: Innovation and Economic Engagement Missions

*Eva Klein, President
Eva Klein & Associates
Great Falls, VA*

This presentation will provide context, theory, models, and examples for how the mission of the 21st century institution seems to be evolving. Since approximately the 1980s, the Global Knowledge Economy has changed nearly everything about how public, private, and academic sectors perform roles in the economy and society. Initially slow to react, our institutions have begun to realize that the Ivory Tower University that served so well through the Industrial Economy now must become a new kind of Relevant University that is more directly engaged in creating economic prosperity and social well-being. And this reinvention will go well beyond now-familiar strategies for technology transfer, incubators, research parks, and faculty start-ups. The speaker will seek to describe how institutions should be evolving into more externally-focused knowledge institutions, oriented to using knowledge — in various ways — to solve real world problems of multiple constituencies.

10:15 a.m. – 11:30 a.m.
marquis ballroom
salons 4 & 5

Keynote Session 3

Sponsored By: ioConsulting

The Element: How Finding Your Passion Changes Everything

*Sir Ken Robinson, Ph.D.
Professor Emeritus
University of Warwick
United Kingdom*

What does it take to achieve personal success and feel like you are in your element? World-renowned innovator Sir Ken Robinson argues that it is not natural talent that drives personal success, but rather a delicate interplay among talent, passion, attitude and opportunity that brings people to achieve their highest levels of success and lead lives of meaning and purpose. Based on his newly released and highly acclaimed book *The Element: How Finding Your Passion Changes Everything*, Robinson takes audiences on a compelling tour of what can happen in all our lives when passion and talent meet. He draws on the personal stories of high achievers in many fields, including Sir Paul McCartney, Arianna Huffington, Matt Groening (creator of *The Simpsons*), Meg Ryan and renowned physicist Richard Feynman. With a wry sense of humor, Sir Ken helps audiences understand:

- What it takes to find “The Element” in our own lives
- Why age and occupation are no barrier
- How to enhance creativity and innovation in both personal and professional settings

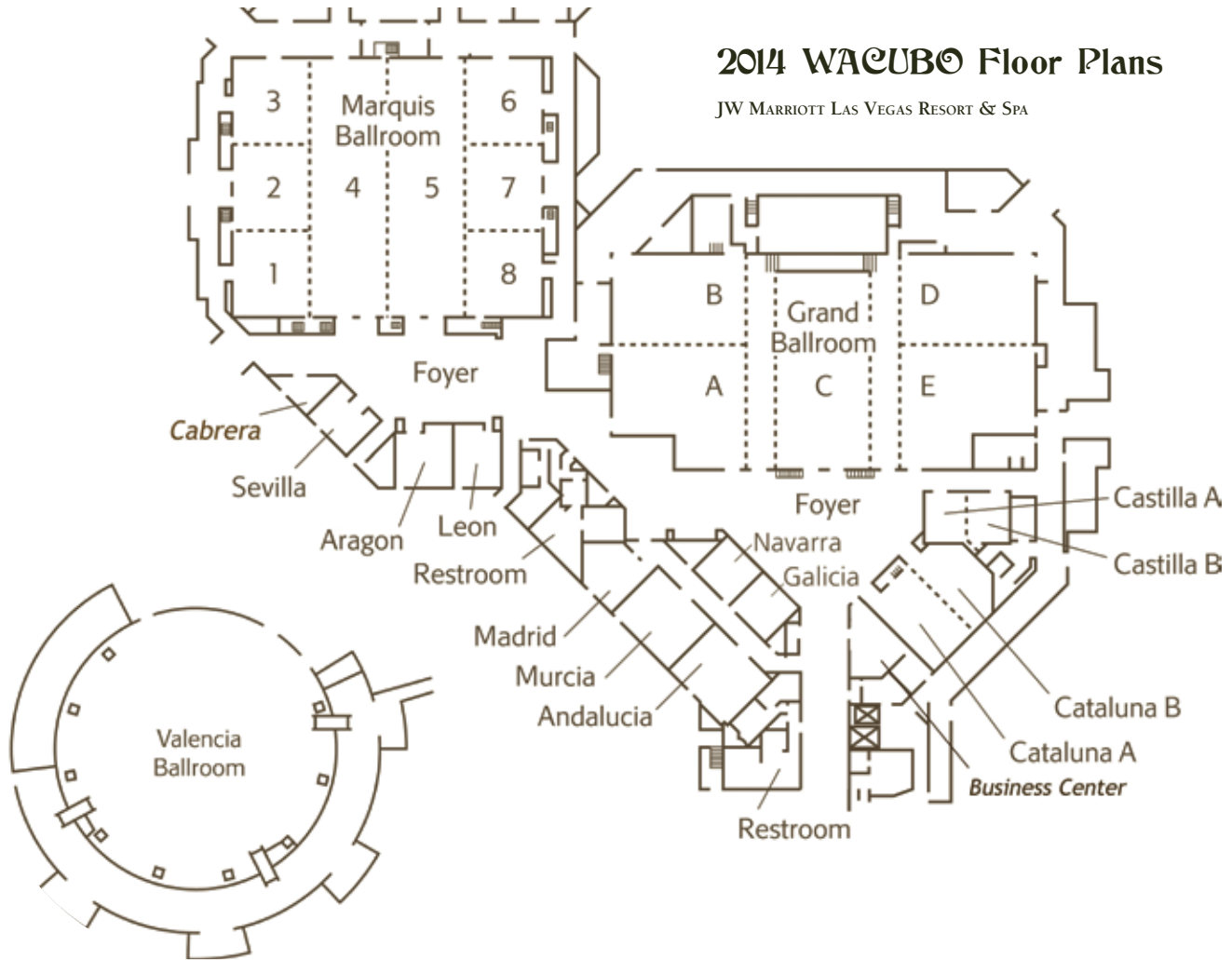
How focusing on “The Element” is an essential strategy in transforming education, business and communities to meet the challenges of living and succeeding in the twenty-first century

11:30 a.m. – Noon
marquis ballroom
salons 4 & 5

CLOSING REMARKS/DRAWINGS

2014 WACUBO Floor Plans

JW MARRIOTT LAS VEGAS RESORT & SPA



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Union Bank
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Barclays
Capstone Development Partners

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Please note: Participating exhibitors subject to change prior to April 18, 2014

Professional Development Workshops

Workshops on specific subjects attract specific audiences. Perhaps one such group matches your target market. Your company may wish to sponsor a workshop, provide in-kind services, or provide or sponsor attendee handouts.

Scheduled professional development programs can be viewed on the WACUBO web site: www.wacubo.org.



The Western Association of College and University Business Officers (WACUBO) is registered with the National Association of State Boards of Accountancy (NASBA), as a Quality Assurance Service sponsor of continuing professional education. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding QAS program sponsors may be submitted to NASBA through its website:

www.learningmarket.org



Business Management Institute (BMI)

August 3-7, 2014

August brings the return of a great WACUBO professional development program for today's and tomorrow's educational leaders. Mark your calendars for **WACUBO's Business Management Institute (BMI), August 3-7, 2014**. BMI is an educational experience for individuals from a broad cross section of experience and skills. BMI offers a unique setting in which to capture the attention of higher education business and administration professionals.

Planning is underway for the 2014 Business Management Institute, August 3-7, at the University of California at Santa Barbara. Questions about BMI...contact Institutes Director Pamela Hemann at pam@assnmgmt.net or (626) 449-4356.

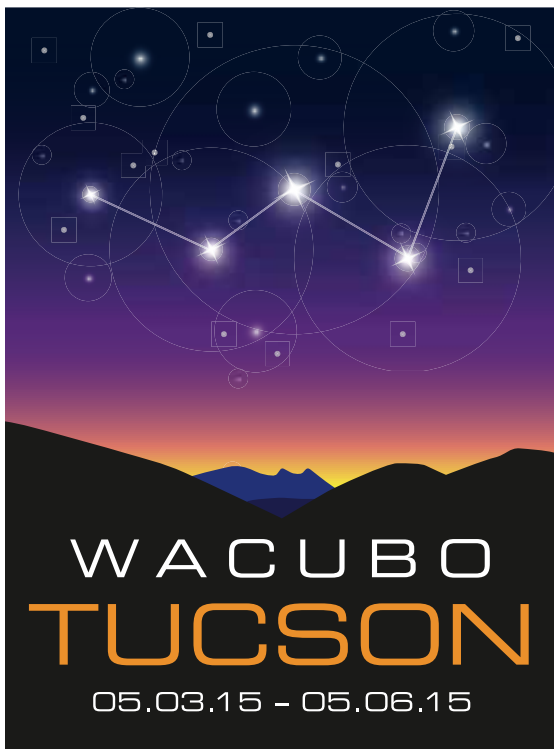
The Business Management Institute (BMI) at the University of California at Santa Barbara is a four-day immersion program with a four-track curriculum. It is designed to develop early-stage professionals and/or those new to higher education business and administration starting with Track 1 through progressively experienced, decision-making professionals with Tracks 3 & 4.

BMI is a proven WACUBO professional development experience. In fact, 91% of the 289 attendees in 2013 said they would recommend BMI to a colleague!

It is anticipated that the 2014 BMI will provide access to over 280 business, finance and administrative professionals from a wide range of institutions.

With four tracks of 45 to 100 participants per track, sponsorship dedicated to BMI offers a variety of options to reach a distinctive gathering in the higher education arena. There are two all-participant general sessions with outstanding keynote speakers for which sponsorship support provides a unique opportunity to reach the entire BMI audience. There is also dedicated sponsorship available for three evening social events, CPE signage and certificates for all four tracks, and logo-branded participant enhancements such as portfolios, pocket badge holders and certificate frames. We hope your company will understand the value of being recognized as a leader in supporting higher education institutions through the 2014 Business Management Institute.

Explore. Discover. Transform.



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05.03.15 - 05.06.15

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