



WACUBO

Holiday Greetings from WACUBO!

JAY D. KENTON, WACUBO PRESIDENT

I hope that this newsletter finds everyone healthy and happy as we begin another new year. Holidays are always a busy and stressful time of year, so this year I hope that everyone can relax and enjoy the rebounding economy knowing that the public coffers will be overflowing with tax revenues to support all our public institutions. Even the privates have much to celebrate with a refreshed investment market; endowment returns look promising as well.

Despite the promise of the rebounding economy and up ticks in the investment markets, it is a very challenging time for financial administrators in higher education. Pension obligations, health insurance costs, construction costs, utilities and other competitive cost factors are creating pressures unlike any time I can remember in my previous 23 years in higher education. These pressures, coupled with the typical politics, both on campus as well as in the statehouses of the government, create an abundance of stress for those of you, like me, who have financial and administrative responsibilities in this industry.



In the December 13, 2005 edition of the *Wall Street Journal*, I read with interest an article entitled, "Pressure to Cut Benefits Reaches, State, Local Government Workers" (pg. B-8). This article describes how increasingly public-sector unions are coming under increased pressure to make concessions on health-care benefits and pensions thereby stirring labor disputes like the current public transit strike in New York City. In Oregon we too are experiencing these types of challenges. Our current fringe benefit rate (other payroll expenses divided by total salaries and wages) is 48% and climbing with no relief in sight. This is partially due to the realization of multi-billion pension liabilities caused by outdated actuary tables, a generous defined benefit plan, fluctuations in the investment market and rapidly escalating costs of health care. At the same time we are being pummeled for not paying competitive salaries and all I can think is that in this environment it will be difficult to have your cake and eat it too.

So what is everyone doing to cope with these trying times? Yoga, meditation, exercise or perhaps alcohol can provide some relief. Perhaps we need to become a free drug workplace like Aldous Huxley described in *Brave New World* – don't forget to take your daily dose of soma. Alternatively, attending meetings and professional development activities, like those offered by WACUBO, is always a good place to obtain new ideas or to commiserate with colleagues. Hearing others' tales of woe always puts the problems at your home campus in some perspective as there are always the – wow I thought I had it bad - type of revelations that result from conversations like this with colleagues.

We at WACUBO continue to do our best to serve your continuing professional development needs. Being an all-volunteer organization we rely heavily on the work of professionals who give freely of their time while holding down significant responsibilities associated with their day jobs. The following is just a snippet of what these hard working WACUBO volunteers have been doing on your behalf this year:

- The professional development committee under the impressive leadership of Keith Foster continues to plan and deliver quality programs. In addition, this group is working with NACUBO on a comprehensive curriculum for the development of specific professional development courses for academic unit business officers, central business office staff; and chief business officers.
- The institutes committee under the inspirational leadership of Sally Roush is working hard to build on the success of our institutes and is planning a special program for the 50th anniversary of the BMI.

LETTER FROM THE PRESIDENT CONTINUED

- Our information exchange dynamic duo of Linda Stewart and Susan Geiss are out beating the bushes to find sponsors for our annual meeting. These ladies work extremely hard to make our annual meetings successful.
- Our host committee is working diligently to ensure that all your needs are met while in Spokane for the WACUBO annual meeting. Many thanks are in order for Tom Johnson, Ron Smith, Bonnie Weinberg, Pat Oliver and many others on the host committee.
- The program committee, led by the dynamic and audacious Mike Unebasami have identified and contracted with speakers to deliver an outstanding program of timely topics for your enjoyment in Spokane.
- The nominations committee, under the divine leadership of Bill Everhart, is working to identify the next generation of leadership for the organization.
- Our futurist and first vice president Stan Nosek is busy developing a strategic plan for his term as our next president.
- The constituent committees are being led by a savvy group that includes Dennis Klaus, Delores Sanford and Charles Ingram. These folks and their committees are working with the membership to gather input on future activities and how we can best serve the needs of small, community college and large institutions.
- Our superlative at-large Board members, Tom Gibson and Jeff West, continue to work on special projects and assist with other Board business.
- Our treasurer, Lorretta Leavitt and Joanne Coville, assistant treasurer are busy paying bills, preparing 1099's and other required reports and otherwise making sure we adhere to our adopted budget.
- The audit committee, under the astute leadership of Jim Dunkelman, is reviewing the activities of our institutes and auditing our finances.
- Our gifted communications director Eric Mosher and others are working to produce this newsletter, maintain the WACUBO website and working to develop a communications plan and the WACUBO brand.
- And last, but not least, WACUBO's extraordinarily talented secretaries; Gregg Goldman and Patti Charleton are working hard to keep our records in order and ensure that our operations are in compliance with our bylaws.

It's quite an amazing group to work with – please join me in thanking everyone for their hard work on behalf of WACUBO.

Don't forget to register for the annual meeting – it's not often that many of you have a reason to travel to Spokane and to discover the Inland Northwest. Take advantage of this rare opportunity – you won't regret it.

I hope that you and your institutions enjoy a prosperous new year!

Sincerely,
Jay Kenton

SUBMISSION OF ARTICLES

Submission of articles: We welcome articles from individuals on a variety of subjects that would be of interest to members of our specific industry. WACUBO also solicits articles from vendors in various industries that are essentially generic in nature, that describe current trends in the industry, and that are of interest to business officers in higher education. The articles are expected to be educational or informative but not favoring any one particular vendor. A byline including the author's name, position and institution will be included. Articles should be brief (500-750 words). Submit all articles in the body of an e-mail message, or as a text document attachment to an e-mail message addressed to mosher@u.washington.edu. The WACUBO newsletter is published quarterly by the University of Washington, on behalf of the Western Association of College and University Business Officers. Copyright 2005 by the Western Association of College and University Business Officers, unless otherwise indicated.

OFFICERS AND MEMBERS

President	Jay Kenton (May 2006) — Oregon University System
First Vice President	Stan Nosek (May 2006) — University of California, Davis
Second Vice President	Michael Unebasami (May 2006) — University of Hawaii
Secretary	Gregg B. Goldman (May, 2006) — University of Southern California
Treasurer	Lorretta Leavitt (May, 2008) — San Diego State University
Communications	Eric Mosher (May 2007) — University of Washington
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National Members	Jay Kenton (May 2008) — Oregon University System Sally Roush (May 2007) — San Diego State University William L. Everhart (May, 2006) — Claremont Graduate University

CHANGE OF ADDRESS

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The Executive Leadership & Management Institute at Stanford

DR. WILLIAM PICKENS, DIRECTOR

“An experience you will really enjoy with a format that facilitates application of ideas. Invaluable personal and professional connections. Excellent logistics and planning. Great facilities and food!!!”

— ELMI Alum, 2005

Sponsored by WACUBO, July 27 through August 4, 2006

(Thursday through the following Friday)

This Institute is a unique experience for those willing to devote serious time and energy toward developing leadership skills. The ELMI stresses cutting-edge issues and strategy skills more than a mastery of information about administration or ideas in traditional management courses. The goals of the ELMI are:

Increasing your *self-awareness* as an administrator and a leader. The goal is have each participant to see themselves as others do and understand the different roles necessary to be effective.

Improving *skills in strategic thinking and taking effective action*. The goal is for participants to develop habits of setting realistic goals, solving problems early, communicating clearly, anticipating the responses of others, delegating well, maintaining perspective, staying flexible, and evaluating progress realistically.

The ELMI emphasizes in-depth discussion of issues, with time to explore and reflect. It offers time away from the daily routine 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 and highly interactive, bombarding everyone with lots of ideas and breaking down barriers to honest exchange.

The Institute’s sessions are organized around situations which, over the long-term, have been shown to make or break the careers of leaders in higher education.

The sessions deal with challenging situations for institutions and leaders, where success requires practiced skill and unwavering attention to results.

The sessions allow each participant:

- To receive individual analysis and specific feedback in areas most important to growth as a leader.
- To develop self awareness from the perspective of others.
- To see the different roles of leaders and demonstrate how to best fill those roles.
- To experience different leadership styles and master the tools of establishing a reputation as a strong leader.
- To understand and learn how to operate effectively within the culture and values of the different areas on campus, including the academic, business, facilities, and student service areas.

For more information about the classes, costs, and faculty (including an electronic application), see the Institute’s portion of the WACUBO website (www.wacubo.org).

For any other information:

Dr. William Pickens, ELMI Director

8912 Clairemont Mesa Blvd.

San Diego, CA 92123

(858) 278-1764 (Voice)

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whpickens@aol.com (e-mail)



August 6-11, 2006

Celebrating 50 Years of Excellence!

Monica Boulay, Director

The Business Management Institute at Santa Barbara celebrates its 50th anniversary this summer. This half-century mark is a great achievement for WACUBO professional development and we'd like you to help us commemorate it. Without the tremendous support of so many member institutions, the Institute would not have reached this milestone. August 6-11 is the date—University of California, Santa Barbara is the place—please plan to join us!

UCSB has been our extremely gracious and efficient host institution for all these years. Repeatedly, on BMI participant evaluations, UCSB receives excellent scores and rave reviews for its conference services, catering, courteous customer service and attention to detail. WACUBO is always confident that participants will be treated well, and enjoy their time on campus.

We expect about 300 participants from across the country to attend this week of intensive professional development. We'll hear from some early participants about the BMI's impact on their lives and careers, and trace the critical issues that have been covered over the 50 years. Higher education managers, supervisors, staff and other mid-level personnel who perform administrative and business functions for the institution will benefit from the Institute, as well as anyone new to higher education. Those who manage the business affairs in an academic department will gain new knowledge and find an advantage in meeting others who perform similar duties.

Senior-level administrative officers and Institute graduates may attend the Continuous Learning program. Design two days to a week of in-depth professional development while you enjoy the wonderful seaside campus and legendary hospitality of UCSB. Discuss new approaches with colleagues while reflecting upon and revitalizing your own goals and career.

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

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

Sandra Lier, associate vice president for business services at University of Washington, will serve as Year Three coordinator. Year Three students use the case study method to discuss typical issues and multifaceted situations that occur on campus. Meeting in small groups with a faculty facilitator, students work closely to analyze campus challenges and explore innovative solutions. The case study sessions are coupled with presentations on current issues in management and administrative topics.

Year Four focuses on rising and escalating issues in higher education, highlighting leadership, change in business and institutional practices, strategic planning and performance measurement. Mernoy Harrison, vice president and provost, Downtown Phoenix Campus and interim chief financial officer at Arizona State University will return as Year Four coordinator. Participants will explore the remarkable impact that campus change, technology and other issues have on all aspects of business functions and higher education administration. The program offers small group discussions, a panel of experts and vital topics in higher education.

Karen Hoefel, vice president for administrative services at Los Angeles Mission College, will continue as Continuous Learning coordinator. The Continuous Learning program is designed for Institute graduates and senior-level administrators who are seeking a stimulating 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.

So, disregard the chilly temperatures, gloomy skies and cold winds for a moment... Picture yourself in a sunny, warm, beachside environment—the 50th Annual WACUBO Business Management Institute at Santa Barbara. We invite you to learn, celebrate and meet your colleagues from near and far as you experience the Institute's lovely, informal atmosphere. For information contact Monica M. Boulay, Institute Director, at EduSpeak@aol.com or 520-298-8680.



2006 Professional Development Workshops

The Professional Development Committee will be offering the following workshops

March 2 & 3, 2006

Improving Your Effectiveness as an Academic Administrator
Portland, OR \$260

Hosts: Dan Morris (dan_morris@ccsn.edu), Philip Stack (pstack@mail.ido.ualberta.ca), Keith Foster (kfoster@ghc.edu)

Site Coordinator: Lynn Valenter (valenter@vancouver.wsu.edu)

This workshop is targeted toward academic administrators within departments and faculties of colleges and universities. Over the day and half workshop it will address the a full range of issues from the macro environmental scan of post-secondary institutions to the micro day to day strategies of dealing with academics. Specifically participants will:

- Learn about major trends in the post-secondary sector impacting the front-line academic units.
- Integrated strategic planning and budgeting

How do you develop and implement an integrated strategic plan within your academic unit that links strategic priorities, with budget and capital requirements.

- Running the Business of an Academic Unit

How do you deal with academics effectively and understand and work with central administration. As well you will receive detailed overviews and strategies dealing with finance and fund accounting, human resource management, research administration, information technology, and emerging legal issues.

- Hearing it from the President

You will hear from a President who will address administrative leadership in academic units and how that contributes to the overall success of the institution.

- Work and Personal Life Balance

You will learn simple and straight forward strategies on how you can maintain a reasonable work and personal life balance within our hectic and demanding worlds.

March 13 & 14, 2006

Introductory & Intermediate Accounting (concurrent sessions)
Ontario, CA \$260

Hosts: Jennifer Stockton (Jennifer.Stockton@cgu.edu), Kim Kvaal (klkvaal@usfca.edu), Carina Moore (cmmoore@ucdavis.edu)

Site Coordinator: Rebecca Dowling (rdowling@oxy.edu)

The Introductory Workshop will provide participants with an introduction to college and university accounting concepts and the basic format used by these institutions in their financial statements. The curriculum emphasizes the common issues and practices between public and private institutions, and focuses on accounting activity relevant to each fund/resource grouping. The Introductory workshop is appropriate for both people new to a college/university accounting position and those interested in an overview of the basics.

The Intermediate Workshop expands upon the material presented in the introductory workshop. The curriculum is geared towards those with experience in higher education finance and accounting, who may be seeking and expanded discussion of both common issues and specialty areas of responsibility. Extensive time is spent on analysis of both public and private financial statements as well as current topics of industry.

Speakers:

Introductory Accounting: Jerry Farley, President of Washburn University, Kim Kvaal, AVP of Business & Finance for the University of San Francisco

Intermediate Accounting: Jim Dunkelman, Treasurer of Claremont University Consortium, Rick Allen, Director of Accounting and Financial Reporting at Utah State University

April 19, 2006

Change Management & Emotional Intelligence
Webinar, Price TBD

Hosts: Bill Pickens (WHPickens@aol.com), Kim Kvaal (klkvaal@usfca.edu), Jennifer Stockton (jennifer.Stockton@cgu.edu)

Preconference Workshop

Plan to improve your time management skills by attending the preconference workshop presented by Kathryn Behrens on Sunday, April 30, 2006. Registration fee is \$50.00.

The fundamental question of time management “What should I do next?” can only be answered in the context of your day. And your day may include your personal priorities, major project tasks, day-to-day responsibilities, and those all-important “other duties as assigned” that your boss sends your way. Spend an hour now to learn how to make better use of your time to focus on the big things. We’ll focus on applying some standard project management techniques such as problem identification, project scoping, how to involve others, and developing action plans to help you get through your day. Along the way, we’ll share some tips and tricks with standard desktop tools that may help shave a few minutes off the day-in and day-out things we all gotta’ do.

Ms. Behrens has worked extensively with higher education and not-for profit organizations in the areas of organizational transformation and process redesign. She currently is special assistant to the dean of the school of business at University of Redlands.



Kathryn Behrens

WACUBO Annual Meeting

April 30 - May 3, 2006

Explore and Discover

Come Explore and Discover the great Pacific Northwest! The 2006 Host Committee is pleased to welcome you to Spokane and to the Red Lion Hotel at the Park for the 68th WACUBO Annual Meeting. The committee and volunteers from a number of local institutions are busy working to ensure that this will be an outstanding conference.

Spokane is located 260 miles east of Seattle and just 25 miles west of the Idaho border. It is the social, cultural, economic and geographic heart of the Inland Northwest, with a population of approximately 500,000 in the metropolitan area. Originally fueled by the natural-resource industries of mining, timber and agriculture, Spokane's economy thrives today on a vital medical community, the presence of five institutions of higher education, a robust U.S. Air Force base, and a strong retail service economy that supports the region.

Residents of Spokane and the Inland Northwest treasure the quality of life in this part of the country. The Spokane area features the benefits of city living – shopping, entertainment, fine dining, sports, theater and the arts – while enjoying all the natural beauty of the region, found just minutes from the metro area. Popular outdoor activities include hiking, jogging, snow- and water-skiing, biking, boating, fishing, golf, mountain- and rock-climbing and camping, to mention just a few options.

The Spokane River provides the natural focal point for the core of the metro area. Spanning the river downtown is Riverfront Park, a 100-acre city landmark that features rolling green lawns, mature pines, views of the Spokane Falls, walking paths, an IMAX Theater, beautiful fountains and a restored 1909 Loeff Carrousel. The conference hotel and the convention center, where our meetings will be held, sit adjacent to the park and to Spokane's robust downtown core. Dozens of restaurants, retail shops and entertainment options await you, all within walking distance of our venues.

Shopping and browsing in downtown starts with a visit to River Park Square. A 373,000-square-foot shopping and entertainment complex that includes Nordstrom, Macy's, William-Sonoma, Pottery Barn, Restoration Hardware, Banana Republic, Ann Taylor, Chico's, and numerous local boutiques and shops.

For those who enjoy the quiet charm of a well-stocked local bookstore, we recommend a visit to Auntie's with its three floors of new, used and collectable books.

Nightlife in downtown Spokane is alive and well. River Park Square boasts a 20-screen Cineplex; the historic Davenport Hotel provides the Peacock Room, where you can enjoy a glass of wine and live entertainment while experiencing the magnificent elegance of the fully restored lobby and ballrooms of the near-century-old building. And the Steam Plant Grill provides yet another fine-dining experience: converted boiler rooms, catwalks, tanks and ladders of the former power plant, built in 1917, provide the setting and include a quiet bar, shops and offices. Spokane offers abundant opportunities for you to enjoy a wonderful meal in a beautiful setting.

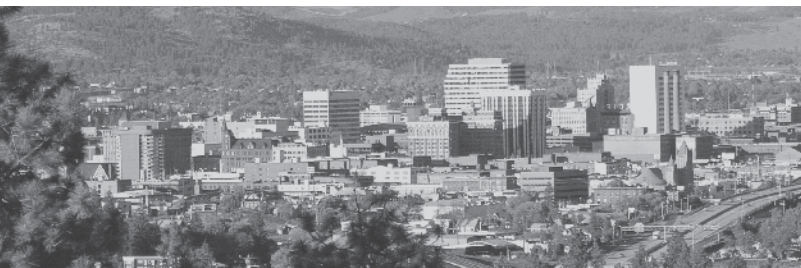
For those inclined to the great outdoors, enjoy a stroll through the park and a walk over the footbridges that give you a birdseye view of the powerful Spokane Falls. For an even closer look, ride the gondola from the park. It takes you right through the river basin, over the falls. For a longer trek, take off either east or west on the Centennial Trail, walking, jogging, biking or skating. The trail stretches from 10 miles west of Spokane more than 25 miles east to Coeur d'Alene, Idaho. If golf is your passion, enjoy one of 19 courses in the immediate area, from Spokane's Indian Canyon to the floating green at the Coeur d'Alene Resort – and be sure to join your peers for the Sunday golf event and experience the highly acclaimed Circling Raven course.

All this and more awaits you as you Explore and Discover Spokane. Enjoy a great conference, renew old friendships and experience the Pacific Northwest. Welcome to Spokane and WACUBO 2006!

Tom Johnson
Whitworth College

Ron Smith
Lewis-Clark State College

Host Committee Co-Chairs



Information Exchange Program News

We look forward to welcoming both business partners and university members to Explore and Discover the Pacific Northwest in Spokane. The largest city between Seattle and Minneapolis, Spokane is known as the financial, medical, educational and entertainment center for the Inland Northwest. We are excited to announce a record number of early exhibitors and sponsors to enrich your experience as you explore and discover the programs and services they offer.

Already committed to participate as exhibitors or sponsors are the companies listed below who offer expertise, programs and services across a broad spectrum of the higher education marketplace.

Sponsored activities will get you off to a great start – and choices! Golf aficionados are invited to spend Sunday morning at Circling Raven Golf Club, a par 72, championship course created amid a unique blend of wetlands, grasslands and woodlands. An alternate Sunday morning event is a 2-3 hour Historic Walking Tour of Downtown Spokane.

After your morning activities, we invite you to the opening of the Information Exchange Exhibits program. Treats and prizes will add to your enjoyment of an early look at what is being presented by business partner exhibitors!

The culmination of Sunday's events is actually the official kick-off to the WACUBO Annual Meeting! Follett Higher Education Group continues their platinum level sponsorship of our opening celebration, where we will experience "Lattes and Light Jazz", an evening rich in local culture, including jazz, lattes, wines, and regional cuisine. The evening will include something for everyone and time to meet and visit with both old friends and new acquaintances.

The opening reception is always a highlight, but you won't want to miss the other sponsored events throughout the meeting, including Monday's Wine and Cheese Reception, sponsored by TIAA-CREF, and that evening's traditional closing event, *Sweets in the Suite*, sponsored by Follett Higher Education Group. A fitting conclusion to the annual meeting festivities includes an elegant reception sponsored by George K. Baum and Company, followed by the traditional banquet, sponsored by Commonfund.

The Red Lion at the Park Hotel, your conference hotel, is conveniently located at the edge of the cascading Spokane River and Riverfront Park, just a footbridge away from the modern and spacious Spokane Opera House and Convention Center. The pedestrian-friendly downtown area, including a beautiful regional mall, is just across Riverfront Park. Spokane has a beautiful four-season climate and natural splendor — you'll also want to take time to explore and discover the such adventures as hiking and biking trails along the Spokane River, climbing, white water rafting, and fishing. Make your plans today to be a part of Spokane 2006, *Explore and Discover...*

BUSINESS PARTNER PARTICIPANTS

A G Edwards & Sons, Inc.	George K. Baum & Co
AIG VALIC	Higher One
Allen & O'Hara Education Services, LLC	Independent 529 Plan
ARAMARK Campus Services	Jenzabar
Banc of America Securities	Johnson Controls
Barnes & Noble College Booksellers	Lehman Brothers
Bon Appetit	Moss Adams LLP
Capstone Development Western Division	PricewaterhouseCoopers
Chartwells Educational Dining Services	RBC Dain Rauscher Inc.
College Book Stores of America	Renaissance Agencies, Inc
Commonfund	Sodexo Campus Services
Communication Excellence Institute	SunGard SCT
Datatel	TIAA - CREF
Driver Alliant Insurance Services, Inc.	Touchnet Information Systems, Inc
E J De La Rosa & Co	Tuition Management Systems
ECCI	Union Bank of California
Follett Higher Education Group	UniversityLease
	Vicenti, Lloyd & Stutzman LLP

Hold the Dates

April 30 - May 3, 2006

Better yet, why not register online now?

Just go to www.WACUBO.org
and follow the links!

And watch for the printed program
with annual meeting details scheduled
for early February delivery.



Annual Meeting Program Invites You to

Explore and Discover

Make plans now to attend the 68th Annual Meeting of the Western Association of College and University Business Officers (WACUBO). With a theme focused on “exploration and discovery,” this year’s meeting serves as a vital bridge between the planning/policy world in which we work and the future of post-secondary education.

Exploration conjures up a vision of travel for the purpose of discovery. Akin to the explorers Lewis and Clark on their historic mission to find the Northwest Passage, we in higher education are also on a mission to explore new ways of doing business that meets or exceeds the highest professional standards set by our institutions.

Where better to begin our journey of exploration than in Spokane, the heart of the Pacific Northwest. Your Program Committee, with its selfless team of volunteers, has worked diligently in pulling together many opportunities for you to find solutions, share innovations, and exchange ideas through an outstanding program of professional development sessions and networking activities.

With an exciting lineup of keynote and general session speakers, leaders and pioneers in their own industries, I anticipate a great meeting. Keynote speaker NASA astronaut Bonnie Dunbar, president and CEO of The Flight Museum, will address the challenges of exploration and the possible benefits of such endeavors. Navigator Nainoa Thompson, the first modern-day Polynesian to practice the art of wayfinding; Mary O’hara-Devereaux, founder and CEO

of Global Foresight; Linda Galindo, president of Galindo Consulting; Arnold Shapiro, Hollywood television producer; and Tom Champoux, co-founder and executive president of The Effectivness Institute, will provide you with the inspiration to succeed in your job and personal life.

If session titles are any indication of what lies ahead, then you are in for a most interesting meeting. In addition to the popular “Tales From the Front” presentations, you can choose from a multitude of captivating topics. And, let’s not forget the Information Exchange program. Here’s your opportunity to meet your partners in the private sector, many of whom provide the type of services you require at your higher education institutions. This is an ideal time to meet vendors you deal with and learn about other companies who might be of service to you in the future.

Come prepared to think of yourself as a global traveler, exploring and moving toward discovery, where upon at the end of your journey you will find a treasure chest of valuable information and materials that you can bank on for future planning and development on your campus.

I look forward to seeing you in beautiful and scenic Spokane!

Aloha,
Mike Unebasami
University of Hawaii Community Colleges
Program Committee Chair

WACUBO Golf Tournament



PHOTO: JOHN R JOHNSON
GOLFPHOTOS.COM

At 8:00 a.m. Sunday morning, May 30, 2006 WACUBO Golf Tournament participants will tee off on the acclaimed Circling Raven Golf Club. Owned and operated by the Coeur d’Alene Tribe, Circling Raven was rated in 2004 by Golf Magazine as one of the 10 best new upscale public courses in America. The 2005 Zagat Survey listed it as one of America’s Top Golf Courses. This is a links-style course that requires accurate drives and rewards careful shot selection. The tournament rates are the same as last year at \$100 for members and \$145 for nonmembers and vendors. Registration fee includes transportation (departs the hotel at 6:15 a.m.), green fees, cart, continental breakfast and box lunch. You don’t want to miss this one. More information on the course can be found on their web site <http://www.golfcirclingraven.net>

2006 Annual Meeting Program



KEYNOTE SPEAKER

EXPLORE, DISCOVER: SPACE – A VIEW FROM ABOVE

Bonnie Dunbar, Former NASA Astronaut and President and CEO of The Flight Museum

Taking from her personal experience as one of the first woman astronauts, Bonnie Dunbar will address the challenges and benefits of exploration as it relates to new frontiers in science, engineering, and humanity as a whole.

GENERAL SESSIONS



Topic: Voyage of Rediscovery
Nainoa Thompson, President of the Polynesian Voyaging Society

For Nainoa Thompson, his voyage of rediscovery began as a dream to retrace the ancient voyaging feats of his ancestors using the centuries-old art of wayfinding. In this presentation, he shares the lessons learned from his quest to realize that dream and the benefits accrued.



Topic: Flash Forward to 2015– Eight Trends Shaping the Future of Higher Education
Mary O'Hara-Devereaux, Founder and CEO of Global FORESIGHT

How will higher education thrive in an aging society and rapidly globalizing world? Is this a “perfect storm” or a landscape filled with opportunities for exciting yet risky changes? Over the next 10 years university business officers will be key partners to help higher education scan, scout and steer its way through the Badlands successfully. Explore 8 powerful drivers and trends shaping your future and discover implications and strategic imperatives that need your response beginning today.



Topic: Lead, Follow, or Get Out of the Way!
Linda Galindo, President of Galindo Consulting, Inc.

We all contribute in unique ways. When the goal is clear, participation toward achieving it can be an exhilarating or frustrating experience. In this dynamic presentation, you will be guided through three powerful steps to effective leadership. Followers will understand their role and the power it provides to influence others for the greater good. And everyone will learn the top two ways to deal with difficult people who seem to be frustrating a group effort.



Topic: “Lights! Camera! Stop The Action!”
Arnold Shapiro, Hollywood Television Producer

Hollywood producer Arnold Shapiro presents a multi-media, interactive presentation on how to effectively handle ethical dilemmas. By using film clips and anecdotal stories of successes and challenges, he draws relevant parallels between show business and academia.



Topic: “Head, Heart, and Backbone: Making Decisions to Balance Your Life and Career”
Tom Champoux, Co-Founder and Executive Vice President of the Effectiveness Institute

Most everyone wants the satisfaction of a successful career along with a personal life full of family, friends, and great experiences. Few manage the balance of these two. Tom will offer an approach and examples with three elements: how your “head” needs to make rational decisions about goals, how your “heart” needs to add emotions about what means the most to you, and how your “backbone” needs to be strong when pressures pull you to one side.

CONCURRENT SESSIONS

TOPIC: Katrina and New Orleans– Who Invited Her???

Patrick M. Gibbs, President and CEO of the University of New Orleans Foundations and VP Emeritus, LSU System
Eileen Kennedy Byrne, Vice President and Chief Financial Officer of the University of New Orleans Foundations

When the largest natural disaster in US history strikes...infrastructure is destroyed... no power, no (potable) water, no sewerage system...roads and bridges are impassable...no telecommunications, local radio, television or print media...campus and virtually entire population of region evacuated and scattered about the country with no access back. How does an institution and its staff begin to recover

– physically, economically and emotionally? What was the experience of the largest public institution in the city of New Orleans and its related foundations?

TOPIC: F&A 101 for University and College Administrators

Barry Johnston, Executive Director for the Business Services/Controller's Office at Washington State University

Lori Selby, Director for Sponsored Programs Services at Washington State University

An institution's understanding of a Facilities and Administrative (F&A) Rate Proposal and the resulting F&A revenue is often perceived very differently by those who conduct the research versus central administration. Over the next year it is expected that most higher education institutions conducting research will receive a disclosure statement (DS 2) audit for the purpose of ensuring actual university practices are adequate and in compliance with federal regulations. This concurrent session will provide an overview of the three broad areas of F&A from varying perspectives, how an F&A rate is determined, and auditor points of emphasis related to the DS 2 audit.

TOPIC: Redefining State Funding Relationships for Public Higher Education

Richard Porreca, Senior Vice Chancellor and Chief Financial Officer, University of Colorado at Boulder

Economic cycles and competing priorities like K-12 education, Medicaid, transportation and corrections have lead to decreasing tax support to public institutions nationally. As a result of decreasing tax support, public institutions have been pressed to consider new funding relationships with state government and operating models that are more closely related to our private sister institutions. Colorado, with 6.5% of its funding coming from state sources, and Virginia, with 13.4%, are two states that have been pushed to the forefront of this emerging change in public higher education funding models. This program will look at the “voucher” funding system in Colorado and “charter school” legislation in Virginia as two models to evaluate as states look for new ways to support institutions and quality, in light of constrained resources.

2006 Annual Meeting Program continued

TOPIC: Explore Higher Education "Two Curve Challenge": Map Your Institution's Big Choices

Mary O'Hara-Devereaux, Founder and CEO of Global FORESIGHT

Business Officers must accelerate their strategic thinking about the long term shifts their leadership and their institution must make. Building on the strategic imperatives presented in the keynote, participants will experience a deeper dive on two of them. Using a strategic tool, they will work individually to identify key changes they need to get underway. They will take home two tools to help them share their perspectives with other leaders in their institutions.

TOPIC: Katrina and New Orleans - Who Invited Her???

Patrick M. Gibbs, President and CEO of the University of New Orleans Foundations and VP Emeritus, LSU System

Eileen Kennedy Byrne, Vice President and Chief Financial Officer of the University of New Orleans Foundations

Continuation from Morning Session

TOPIC: Managing the High Profile/ Popular Employee

Rick Schlegel, Associate Vice President for ELL Claims and Associate General Counsel for Claims Management at United Educators

This session explores the multiple challenges an institution confronts when charges of misconduct are leveled at a campus icon — whether involving a basketball coach, a charismatic president, or an award winning academic. The centerpiece of the session is a short DVD-based scenario that focuses on disciplinary action against a fictional employee—a popular, personable, and high-performing basketball coach who is accused of acting inappropriately following a hazing incident at his school. Controversial situations like this require sensitivity toward all the parties, skill in negotiating, and sound legal understanding. Some of the issues the scenario addresses include contract negotiation and performance expectations, investigation of employee misconduct, and management of a divided campus and community through effective communication.

TOPIC: Developing Knowledge Workers for Improved Service Delivery

Ruth Johnson, Senior Associate Treasurer, University of Washington

As technology advances and staff members spend less time on processing routine transactions, expectations are rising for them to be able to solve more complex problems, anticipate customer needs, develop strong process partner relationships, and train others about what they do. Join colleagues in discussing how to make this transition and help staff embrace the concept and develop new skills. This presentation will describe the steps being taken in Financial Management at the University of Washington to address this need.

TOPIC: The Power of Personal Accountability

Linda Galindo, President of Galindo Consulting, Inc.

In this presentation participants will experience why accountability is the fundamental success factor for any organization or system to be successful. This interactive presentation introduces and demonstrates how to transform plans into action. Participants will be invited to adopt personal responsibility and accountability as the foundation for individual and team success. Learn how to create personal strategies for improving accountability and internalize the importance of making and keeping agreements.

TOPIC: Why Are Those Crazy Ones Working Together to Build the Quali Financial Information System and What Are They Doing?

Charles Ingram, Assistant Vice President for Financial Services, University of Arizona

David Lassner, Chief Information Officer, University of Hawaii

David Lyons, Senior Fellow, NACUBO

John F. Walsh, Senior Director, e-Business Services, Indiana University

Why would six universities want to work together to build a new open source financial information system? Why would NACUBO get involved in the project? And why would the Mellon Foundation provide \$2.5m to help them do it? This session will provide background on the new Community/Open Source approach to software in higher education, how the Quali project is leveraging the successes of other projects to administrative software systems, and why Quali partner institutions adopted this innovative approach in the face of so much skepticism.

Topic: Ethics in Higher Education

Arnold Shapiro, Hollywood Television Producer

Professional speaker and television producer, Arnold Shapiro, shares his stories, experiences, and lessons learned in dealing with personnel and other management issues.

TOPIC: Overview and Demonstration of Quali Financial Information System Functionality

Charles Ingram, Assistant Vice President for Financial Services, University of Arizona

David Lassner, Chief Information Officer, University of Hawaii

David Lyons, Senior Fellow, NACUBO

John F. Walsh, Senior Director, e-Business Services, Indiana University

This session will provide a more detailed description of the Quali Financial Information System and its functionality for finance officers. It will describe the software approach taken by the project, and demonstrate a number of the components and how they will work in production.

TOPIC: Leadership: Is It In You?

William O'Donnell, Vice Chancellor for Administrative and Fiscal Affairs at Indiana University South Bend

This session will cover general elements of leadership, effective leadership types, and the relationship between leadership and authority. Participants will learn to identify effective leadership qualities in themselves and others and form a better understanding of the keys to successful leadership.

TOPIC: The Fiscal Environment for Higher Education: Realities and Responses

Dennis Jones, President of the National Center for Higher Education Management Systems

The economies in most states are turning around after the severe downturns of the early part of the decade. While there is reason for optimism among higher education leaders, there is also evidence that higher education will continue to face years of limited state funding. The reasons for this bearish perspective, as well as steps that institutions can take to maintain effectiveness within this constrained economic environment, will be discussed in this session.

Presentations Set for Tales From the Front

After a highly competitive selection process, the Professional Development Committee selected four Tales from the Front proposals that are sure to pique the interest of attendees at the WACUBO annual meeting. "One of the most fun things about serving on the Professional Development Committee is the opportunity to review proposals for Tales from the Front," says Committee Chair Keith Foster. "Each year, the Committee learns about amazing accomplishments being performed on campuses throughout the Western United States. It is always hard to select only four or five proposals that will most interest our members. We work hard to not only select interesting proposals, but also select proposals that are representative of the various types of institutions within WACUBO."

PDC selections this year include presentations from the University of Oregon and Southern Oregon University on a partnership to implement and support a facilities maintenance and management system, a presentation on transforming student billings and collections by Santa Clara University, a presentation by Cal State-Fullerton on the bidding process for capital projects, and staff from Gonzaga University will discuss new ways to build engagement with alumni.

Again, from the PDC Chair, Keith Foster: "It is always gratifying to see so much support for the TFTF presentations at the annual meeting. I have been told many times that conference attendees look forward to the Tales from the Front presentations. I'm sure conference attendees in Spokane will be pleased with this year's selections."

NACUBO Update

The NACUBO Board of Directors held committee meetings and a regular Board Meeting on November 18 and 19 in Tampa, Florida.

The Board Meeting began with an executive session update on the progress of the search to select a new President, in anticipation of Jay Morley's imminent retirement. The Search Committee is optimistic that a successful candidate will be identified in the near future.

The three standing committees of the Board – Planning; Performance Oversight; and External Relations – met to conduct the business of each. The Planning Committee recommended a modified Board meeting in March 2006 since it is unlikely a new President will have been on board for a sufficient amount of time to engage in any meaningful planning activity. The Performance Oversight Committee recommended two policy initiatives, which were adopted the following day at the Full Board meeting. The External Relations Committee discussed federal issues that impact the higher education community.

At the full Board meeting, an Ethical Conduct Policy, and Reserves Accumulation Resolution were approved as recommended by the Performance Oversight Committee. The reserve policy, equal to at least three months of annual operating expenses and up to \$1.5M for one-time special initiatives or activities, will allow NACUBO to continue

providing member benefits and services on an ongoing basis while promoting new initiatives.

The ACUBO Steering Committee also met and reviewed the significant progress that is taking place regarding the development of a broad based curriculum for business officers. This project has produced a good amount of very useful information, and will help both the regional associations as well as NACUBO provide needed professional development programs in a cost effective and collaborative way. WACUBO's Professional Development Chair, Keith Foster, has been actively involved in this effort and has contributed to its success.

A retirement dinner honoring Jay Morley was held following the Board of Directors meeting. Jay will step down as NACUBO President in the spring. His years of dedicated service to NACUBO and leadership in higher education were honored by the Board.

NACUBO's 2006 Annual Meeting will be held in Honolulu, Hawaii on July 8-11, 2006. As a first-of-its-kind joint conference of NACUBO, APPA and SCUP, "The Campus of the Future: A Meeting of the Minds" will create the opportunity for an unprecedented connection for formal exchange and informal dialogue among three leading associations that serve higher education. For additional information on the 2006 Joint Conference, go to <http://www.campusofthefuture.org/>.



WACUBO 2006 Calendar

2006

January 13	Performance Management and Assessment/Benchmarking	Tucson, AZ
March 2-3	Improving your Effectiveness as an Academic Administrator	Portland, OR
March 13-14	Introductory Accounting	Los Angeles, CA
March 13-14	Intermediate Accounting	Los Angeles, CA
April 19	Change Management and Emotional Intelligence	Webinar
April 30	Time Management (Preconference Workshop)	Spokane, WA
April 30 – May 3	WACUBO Annual Meeting	Spokane, WA
July 8-11	NACUBO Annual Meeting	Honolulu HI
July 27- August 4	Executive Leadership Management Institute	Stanford, CA
August 6-11	Business Management Institute	Santa Barbara, CA

WACUBO

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