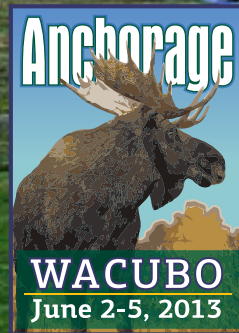


western Association of college and university business officers

north to the future



A GOLD RUSH OF OPPORTUNITY



WESTERN ASSOCIATION of
COLLEGE AND UNIVERSITY BUSINESS OFFICERS
Conference Program 2013

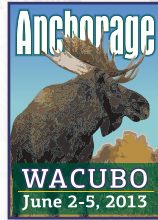
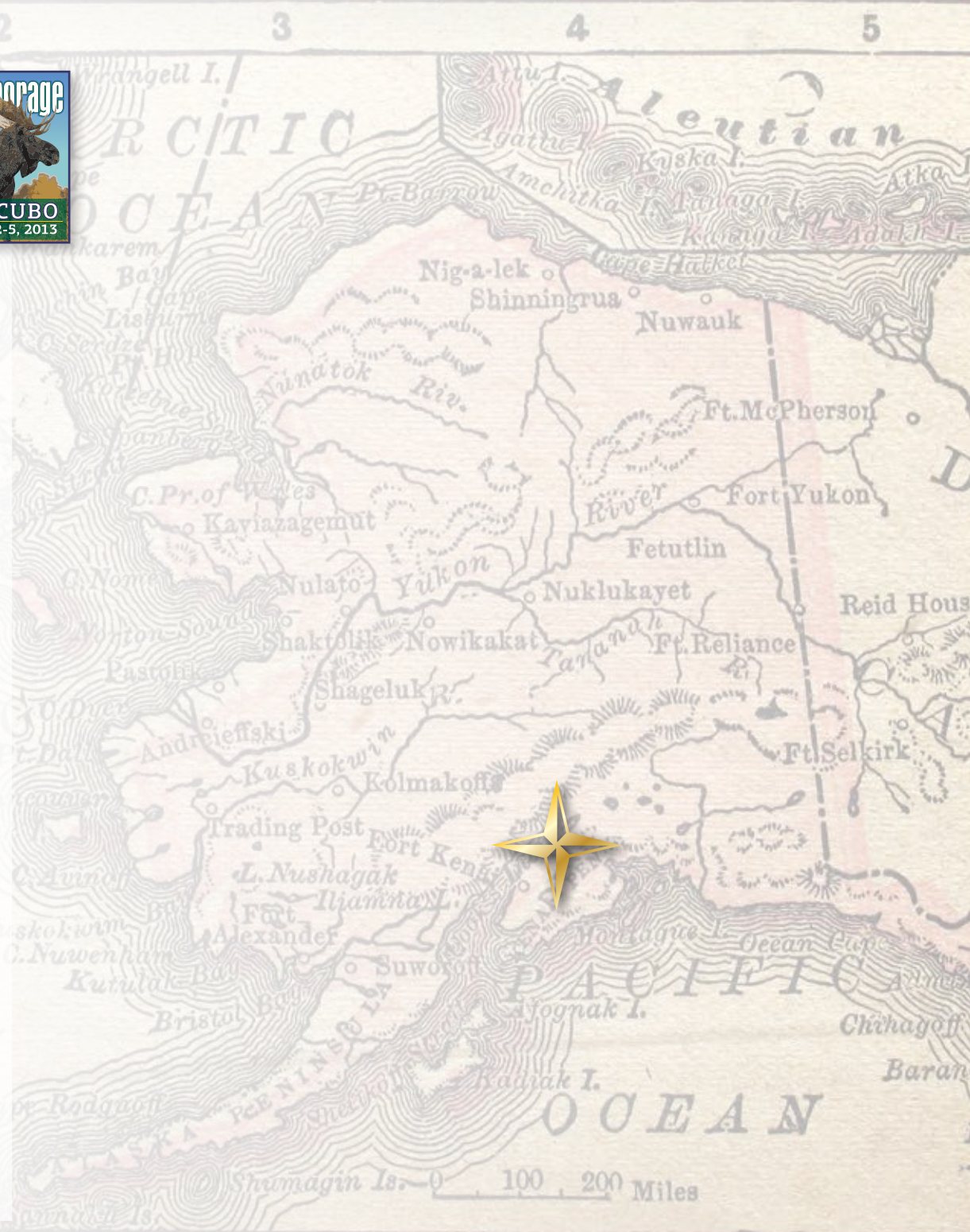


table of contents

WACUBO 2013 BOARD OF DIRECTORS	3
PRESIDENT'S MESSAGE	4
PRE-CONFERENCE WORKSHOP	5
EVENTS SUMMARY	6
SESSION TRACKS	8
KEYNOTE SPEAKERS	9
GENERAL SESSION SPEAKERS	11
SCHEDULE OF EVENTS	13
CONFERENCE INFORMATION	22
REGISTRATION	24
SPONSORS AND EXHIBITORS	25
OTHER EVENTS	26



WACUBO 2013 Board of Directors

BOARD MEMBERS

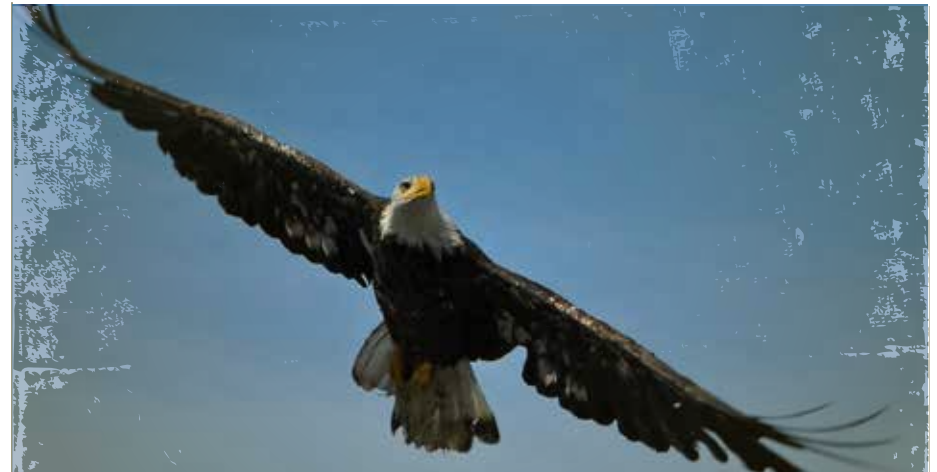
President	Gregg Goldman, University of Southern California
First Vice President	Paul Jenny, University of Washington
Second Vice President	Harold Hewitt, Jr., Chapman University
Secretary	Kori Wetsel, University of Utah
Treasurer	Jean Vock, University of Arizona
Communications Chair	Stuart Roberts, University of Alaska, Fairbanks

Committees:

Professional Development	Co-Chair, Robyn Pennington, California State University, Chancellor's Office Co-Chair, Scott Burns, San Diego State University (in memoriam)
Community College	Chair, Sue Tavakoli, Estrella Mountain Community College
Small Institutions	Chair, Robert Moore, Colorado College
Comprehensive Doctoral Research	Co-Chair, Lynn Valenter, Washington State University Co-Chair, J. Michael Allred, University of California, Davis
Audit	Chair, Tom Schappacher, University of Washington
Finance	Jeffrey Riddell, Cornish College of the Arts
National Representatives	Daniel Morris (Past President), College of Southern Nevada Gregg Goldman, University of Southern California Paul Jenny, University of Washington

WACUBO PROGRAM COMMITTEE MEMBERSHIP

Chair	Harold Hewitt, Jr., Chapman University Arch Asawa, Soka University Janna Bersi, California State University, Dominguez Hills Teresa Costantinidis, University of California, San Francisco Lisa Frace, Arizona State University Cheryl Heath, Northern Wyoming Community College District Dave Lawrence, Pacific Union College Carina Celesia Moore, University of California, Davis Jan Parten, California State University, Fresno Stuart Roberts, University of Alaska Anchorage Michael T. Unebasami, University of Hawaii
-------	--



HOST COMMITTEE

Co-Chair	Monica Kane, University of Alaska Anchorage
Co-Chair	Bill Spindle, University of Alaska Anchorage Chris Axtell, University of Alaska Anchorage Mary Kaye A. Bailey, College of Southern Nevada Dean Calvo, Claremont Graduate University Brian deZeeuw, University of Alaska Anchorage Joan Gunnarson, University of Alaska Anchorage Harold Hewitt, Jr., Chapman University Andrea Lee, University of Arizona Bob McDonnell, University of Alaska Anchorage Robert Moore, Colorado College Daniel Morris, College of Southern Nevada Camille Oliver, University of Alaska Anchorage Jane Pallister, University of Alaska Anchorage Patricia T. Putnam, University of San Diego Michelle Rizk, University of Alaska Stuart Roberts, University of Alaska Fairbanks Paula Williams, University of Alaska Anchorage

INFORMATION EXCHANGE

Chair	Dean Calvo, Claremont Graduate University Michael Catanzaro, University of San Diego
-------	---

president's message

Dear WACUBO Members and Colleagues:

On behalf of the Board of Directors, Program, and Host Committees, I would like to invite you to participate in the 75th Annual Conference of the Western Association of College and University Business Officers. If this is your first WACUBO Annual Conference or you have attended in the past, I can assure you that the program content, amazing location, and opportunity to network with your friends and colleagues from around the west will provide you with a perfect set of reasons to join us in Anchorage.

The theme for this year's meeting is North to the Future: A Gold Rush of Opportunity, which is an indication of not only where the meeting is being held but also indicative of our current environment and possibilities for our future.

I encourage you to review the program material in detail as there are many amazing speakers, presentations, and discussions as well as ample opportunities for informal gatherings and networking with your colleagues. In addition, the Information Exchange program is a great chance to interact with our partners in the private sector who provide so many important services to our industry.

The Host Committee, co-chaired by William Spindle, Vice Chancellor for Administrative Services and Monica Kane, Assistant Provost both from the University of Alaska Anchorage have done an outstanding job of organizing this year's meeting with the help of their able volunteers. The Committee has developed a wonderful slate of social activities and entertainment experiences unique to the wonderful state of Alaska and city of Anchorage.

The Program Committee, led by Harold Hewitt, Executive Vice President and Chief Operating Officer at Chapman University is responsible for the conference's theme, speakers, and programs, which will make the time spent

on professional development extremely worthwhile. They have raised the bar like never before with the session content and quality of our speakers, pushing our thinking and learning with a slate of keynotes along with numerous general and concurrent sessions.

We are continuing our emphasis on the Tales from the Front presentations, focusing on issues currently being dealt with on our campuses and presented by your peers who have actually dealt with these issues.

Our Information Exchange program, led by Dean Calvo, Assistant Vice President/Assistant Treasurer at Claremont Graduate University has worked to bring many partners, new and familiar, to the meeting this year so we can become more aware of their services. This is an ideal opportunity for you to interact with the people and companies that may provide just the service or product you need to address a particular issue at your institution.

I would like to personally thank each of our WACUBO Board members and all of our dedicated committee members and volunteers, as we could not deliver the quality professional development opportunities and other programming without them. When you see them at the meeting, please take a minute to thank them for all they do as being a volunteer run organization we could not manage without them.

Once again, thank you for considering participation in our Annual Conference and I look forward to seeing you in Anchorage.

Gregg Goldman
University of Southern California
Marshall School of Business



PRE-CONFERENCE WORKSHOP

Preparing for Challenges Ahead

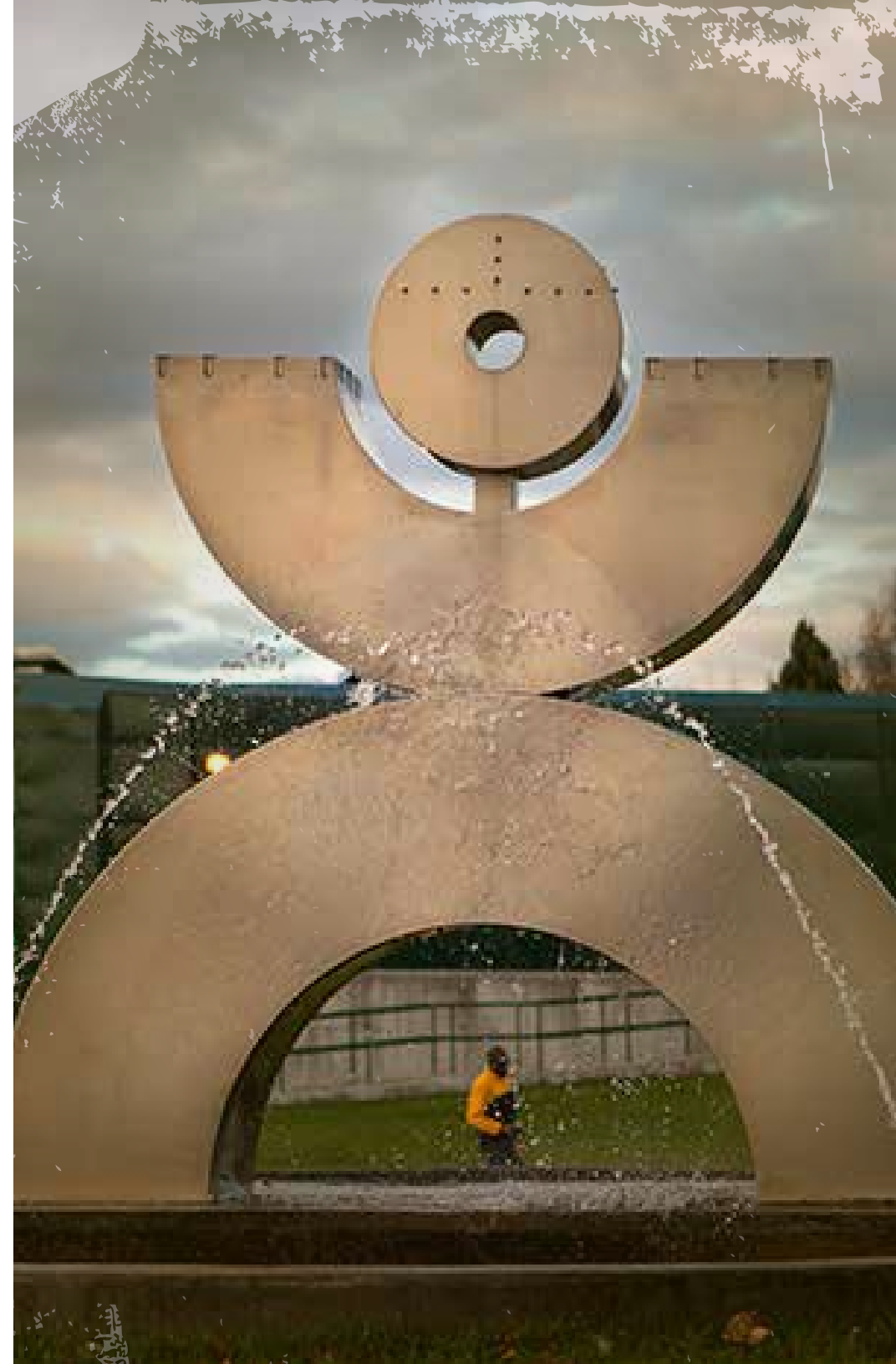
Saturday, June 1, 2013

University of Alaska, Anchorage Campus

9:30 a.m. – 2:30 p.m.

Registered Participants \$20.00 (includes lunch and materials)

Join us for an interactive workshop which focuses on some of the major challenges facing higher education institutions—especially small institutions. Speakers will help attendees better understand higher education economic issues and will assist attendees in better preparing to have those “difficult conversations” which are sometimes required in personnel management. The lunch hour will be devoted to providing opportunities to meet and interact with representatives from other similar campuses. While the program is being offered by the WACUBO Small Institutions Committee, all WACUBO attendees are invited to participate. Bus service will be provided and will depart from the Captain Cook Hotel at 9:30 a.m. and will return by 2:30 p.m. Please come prepared to ask questions and share your experiences, successes and challenges.





Events summary

Glacier Quest Cruise

Sunday, June 2, 2013—Blackstone Bay

6:00 a.m.—1:30 p.m.

Member \$100

Children 2-11 \$100

Business partners and guests \$165

Children under 2 – Free

Special for WACUBO conference attendees, this once-in-a-lifetime charter will take you on a tour of Alaska's magnificent Blackstone Bay in world-famous Prince William Sound, home to seven glaciers and Yosemite-scale waterfalls. This tour will allow you to see the towering cliffs of the massive tidewater glaciers of Alaska, and offers some of the most magnificent vistas available anywhere in the world.

The cruise also offers the opportunity to observe many different kinds of Alaskan wildlife, including sea otters, orca/killer whales, humpback whales, bears, mountain goats, sea lions, Dall's porpoise, and thousands of birds including majestic bald eagles. We encourage you to take advantage of the opportunity to experience the grand Alaskan wilderness during your stay!

Opening Reception And Kick-Off Dinner at Anchorage Museum

Sunday, June 2, 2013

6:00 p.m.—10:00 p.m.

Sponsored by: Follet Higher Education Group

Join us for the kick-off to the 2013 Annual Conference at the Anchorage Museum. Recently expanded, the building is easily noticeable for its shimmering glass façade, which provides ultraviolet protection for the museum's exciting and interesting exhibits showcasing Alaska's history and art. Tour the Alaska Gallery, which offers a look at the early lifestyles of Alaska's Native peoples, the settlement by the Russians, the gold rush era, World War II, and statehood. Experience Art of the North, an exhibit which contains the best Alaska art and art from the circumpolar North. Learn by doing in the interactive Imaginarium Discovery Center, which houses exhibits devoted to earth, life, and physical science. Immerse yourself in Alaska Native art in the Smithsonian Arctic Studies Center, which houses more than 600 Alaska Native artifacts. In addition to the permanent exhibits, at the time of the conference, the museum will also be housing "Arctic Flight: A Century of Alaska Aviation," an exhibit displaying artifacts, photographs, and videos from 100 years of Alaska flight. Also featured will be educational and entertaining performances with a local flavor. We hope you will take advantage of this opportunity to learn about Alaska history, culture, and art!

Events summary continued

Member Appreciation Luncheon

Tuesday, June 4, 2013

12:00 p.m. — 2:15 p.m.

Sponsored By: TBD

Back by popular demand, four-time Iditarod dog-sled champion Martin Buser will be featured at the Member Appreciation Luncheon. Buser is known throughout Alaska not only for his success in racing, but also for his sense of humor, positive outlook, and strong involvement in rural Alaskan communities. Don't miss out on the photo opportunity with Buser and his champion sled dogs! Please take advantage of the chance to relax, and join us in offering enthusiastic thanks to WACUBO members, conference attendees, guests and sponsors. This lunch is our opportunity to extend an Alaskan thank-you to each of you for your continuing support and participation in WACUBO.

Annual Reception

Tuesday, June 4, 2013

6:45 p.m. — 7:45 p.m.

Sponsored by: George K. Baum & Co.

Please join us at the Captain Cook Hotel for the precursor to the Annual Banquet and Dance. Take the opportunity to enjoy light refreshments and drinks, and mingle with your friends and colleagues. It's a great way to unwind after a full day of sessions!

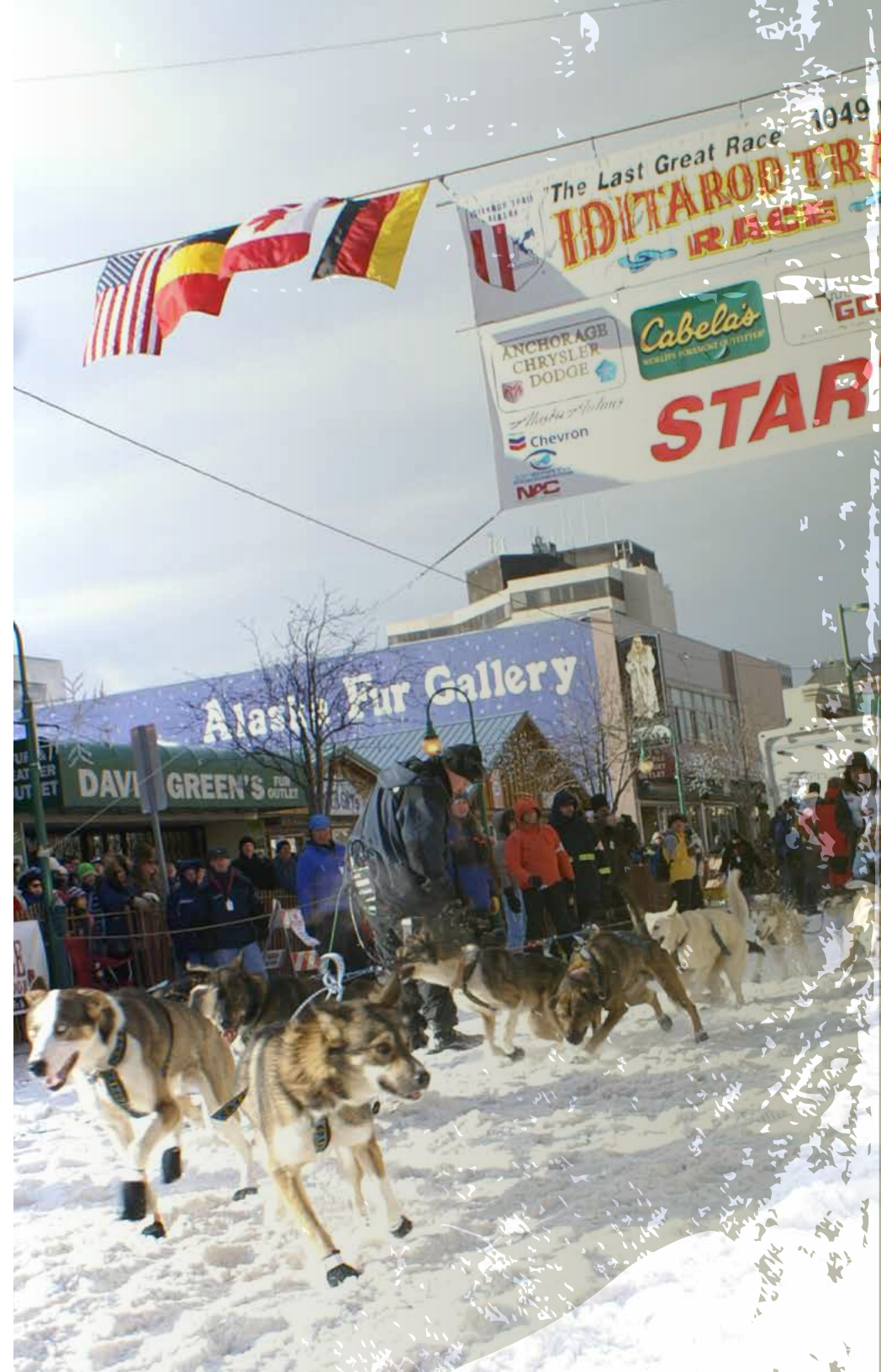
Annual Banquet and Dance

Tuesday, June 4, 2013

7:45 p.m. following the reception at Captain Cook Hotel

Sponsored by: Barnes & Noble

There is one more morning of sessions to go, but be sure to attend the Annual Banquet. Join your friends and colleagues for a final evening of great food, drink, conversation, and music. Dinner will feature wines and ale from Alaska, as well as the best Alaska cuisine. After dinner, we'll kick the festivities into high gear with a performance from a local Alaskan band. Come and dance with us under the midnight sun!



session tracks

Educational sessions are organized into the following tracks to help attendees navigate the complete schedule.



ADVANCING WITH TECHNOLOGY

Any investment in technology must be worthwhile. Mobile computing, cloud computing, open-source administrative software, and data security are just some of the technologies at the forefront of advancement for higher education institutions. Explore the decisions facing business officers and discuss the opportunities of these newest technologies.



CULTIVATING LEADERSHIP

Leadership is about inspiring others to action. Build skills that will help you understand and effectively deal with the key challenges facing leaders in higher education today and into the next decade. Learn how to foster an environment that promotes high performance on a personal, professional, and organizational level.



DOING THE NUMBERS

Accounting, tax administration, and compliance are at the heart of many business office operations. Learn about current issues and best practices from colleagues and national practitioners. Gain perspective on the impact of potential reforms on your institution.



FINANCING THE ENTERPRISE

Economic realities influence both short- and long-term planning, policies, and financial administration. Hear the latest on endowment management, liquidity, revenue diversification, strategic analysis, and growth opportunities.



FOSTERING ORGANIZATIONAL EFFECTIVENESS

Pursuing the goals of a strategic plan by creating and implementing new business practices presents challenges for administrators. Discover how campus leaders redesigned business centers, fostered collaboration, altered organizational structures, and overcame resistance to institutional change, lower costs, cultivate efficiency, and achieve transformative objectives.



PLANNING AND BUDGETING

Ensuring your institution's viability is essential. Transform your institution by incorporating integrated planning, financial modeling, performance measurement, and other innovative strategies. Discover approaches to planning capital projects and assessing key institutional components, such as investments, faculty productivity, facility use, and effective partnerships.



SUSTAINABILITY

From energy-transition planning to behavior change, campus leaders understand that as stewards of the institution, sustainability is a business imperative. Learn the importance of acting as a change agent for your institution. Expand your knowledge on how sound environmental leadership can guarantee the long-term financial sustainability of your institution, increase efficiency of operations, avoid risks, and generate cost savings.



RUNNING THE CAMPUS

Challenging times focus attention on innovation and increased efficiencies in all aspects of campus management. Learn how your peers are striving for excellence by optimizing capital assets, building human resources, managing risk, and anticipating new roles for auxiliaries.



THE NATIONAL AGENDA

What is happening in Congress and the Department of Education that affects your campus? What steps should business leaders in higher education be taking to inform their campuses and respond effectively to federal initiatives, regulations, and funding discussions? Join your colleagues as we engage national leaders on the policy issues that matter to higher education.

WACUBO 2013 keynote speakers



TRACK: CULTIVATING LEADERSHIP

Monday – June 3, 2013

8:30-9:45 a.m. Keynote Session I

Jeff Salz, Author, Motivational Speaker, Anthropologist, Thought Leader and Explorer and Guide

The Adventure of Change

Adventurers and adventurous organizations are energized by uncertainty and adversity. Learn the secret of how to create the ultimate competitive advantage in times of change as Dr. Jeff Salz reveals and explains the Six Steps.

Gleaned from 40 years of mountaineering, exploration and expedition leadership, these are the lessons that have been adopted by some of today's most successful teams and institutions.

Attend this exciting, entertaining session to discover the 'best practices of the successful adventurer'—invaluable insights for mastering innovation and risk-taking in a world of unprecedented change.



Dr. Jeff Salz has made a lifetime of adventure. An acclaimed explorer—with a Ph.D. in anthropology - he has traversed most of the remaining blank spots on the globe. The author of *The Way of Adventure: Transforming Your Life and Work with Spirit and Vision*—recognized globally as the definitive book on adventure - Jeff creates the foundation for creative thinking in any organization by presenting a unique perspective on risk-taking, participation and innovation.

Jeff has spent 30 years as a mountain guide, 10 years as a university professor and for the last 20 years, he has been safely guiding top tier executives at organizations like Google, Microsoft, Hewlett Packard, Walt Disney, IBM, and eBay through the turbulent seas of change while facilitating enhanced teamwork, innovation and creativity.

Audience members will recognize Jeff from his frequent appearances as program host on the on the History Channel and the Discovery Network. His freewheeling humor and profound sense of humanity turn every meeting into a memorable event. With remarkable adventure tales and thought-provoking concepts, Jeff continues to instill his audiences with fresh strategies and enthusiasm for life and career.



TRACK: THE NATIONAL AGENDA

Tuesday – June 4, 2013

9:00-10:15 a.m. Keynote Session II

Margaret Spellings, President and CEO, Margaret Spellings and Company, and Former U.S. Secretary of Education

Ralph Wolff, President and CEO, Senior College Commission of the Western Association of Schools and Colleges

John Walda, President and CEO, NACUBO

The Spellings Commission and Higher Education in America Today

In many ways the final report of the Commission on the Future of Higher Education (also known as “The Spellings Commission”), published in 2006, set the course for U.S. Higher Education. Both substantive and controversial, this report—“A Test of Leadership: Charting the Future of U.S. Higher Education”—continues to have impact. U.S. Secretary of Education Margaret Spellings assembled the 19 member commission in September, 2005. The final report focused on access, affordability, standards of quality and accountability for colleges and universities, which remain, arguably, the key areas of focus for Congress and the U.S. Education Department today. One area deeply impacted by the report is regional accreditation. WACUBO welcomes Secretary Spellings to the Conference. She will present her thoughts on the current state of higher education, and then she will be joined by the President and CEO of WASC—The Senior College Commission Ralph Wolff in a discussion that will be moderated by NACUBO President John Walda.



Margaret Spellings is President and CEO of Margaret Spellings and Company and a leading national expert on public policy. Spellings also serves as a strategic advisor to the U.S. Chamber of Commerce and President of its U.S. Forum for Policy Innovation. Spellings served as U.S. Secretary of Education from 2005 to 2009. In that role, she oversaw an agency with a nearly \$70 billion budget and more than 10,000 employees and contractors. As a member of the President's Cabinet, she led the implementation of the No Child Left Behind Act (NCLB). In higher education, Spellings launched a national policy debate and action plan to improve accessibility, affordability, and accountability in our nation's colleges and universities. Spellings initiated international outreach and collaboration by leading delegations on behalf of the President of the United States as well as overseeing the development and implementation of international education agreements with such countries as China, Russia, and the United Arab Emirates.



Ralph Wolff is the President and CEO of the Senior College Commission of the Western Association of Schools and Colleges (WASC, the Senior College Commission). Ralph has been with WASC for 30 years, serving as President from 1996 to the present time. In that capacity, he has led WASC to the forefront of accreditation as an agent of public accountability and innovation. He received over \$2 million in grants to transform the accreditation process to an outcomes and learning based model, which has been in place since 2001. For this work, he received the Virginia B. Smith Award for Innovative Leadership. He has written and spoken internationally on the redefinition of quality in higher education, and the role of accreditation as an agent of change and institutional transformation. At the national level, he has been appointed to represent regional accreditation in negotiated rule making sessions held by the Department of Education in 2006, 2008 and 2010.



John Walda is the President and CEO of the National Association of College and University Business Officers (NACUBO) in Washington, D.C. John's career has also been in both public policy and law. He received his B.A. degree and J.D. from Indiana University. He was president of the Indiana University Board of Trustees for eight years, Chairman of the Association of Governing Boards, Chairman of the Board of Clarian Health Partners in Indianapolis which owns and operates the Indiana University hospitals, and Chairman of the Indiana Lottery Commission. Before joining NACUBO, John was a partner in the Litigation Group of Bose McKinney & Evans, representing clients in Indianapolis and Washington, DC, and Senior Vice President—Federal Relations for BoseTrecy Associates LLC.



Track: Cultivating Leadership
Wednesday – June 5, 2013

10:15-11:30 a.m. Keynote Session III

Daniel Pink, Author and Journalist

Drive: What the Science of Motivation Can Teach You About High Performance

Daniel Pink, best-selling author of *A Whole New Mind*, uses four decades of behavioral research to reveal why the traditional approach to high performance backfires on most organizations. In a provocative and entertaining presentation, members will see how many common organizational incentives often go wrong—and can reduce both creativity and satisfaction on the job. Participants will learn that the people who do what they do because of enjoyment of the task itself routinely outperform those who are motivated by external rewards. With examples from cutting-edge companies and intriguing experiments around the world, audiences will learn the three key ingredients of intrinsically-motivated high performers—and demonstrate how organizations can create contexts that tap our deepest motivations to produce the highest results.



Daniel H. Pink is the author of four provocative books about the changing world of work—including the long-running *New York Times* bestseller, *A Whole New Mind*, and the #1 *New York Times* bestseller, *Drive*. His books have been translated into 33 languages. In 2011, Thinkers50 ranked him one of the 50 most influential business thinkers in the world. A free agent himself, Dan held his last real job in the White House, where he served from 1995 to 1997 as chief speechwriter to Vice President Al Gore. He also worked as an aide to U.S. Labor Secretary Robert Reich and in other positions in politics and government.



WACUBO 2013 general session speakers



TRACK: RUNNING THE CAMPUS

Monday – June 3, 2013

3:30-4:45 p.m. General Session I

Janice Abraham, CEO, United Educators

Janet Judge, President, Sports Law Associates, LLC

The Continuing Impact of the Penn State Tragedy: Lessons Learned and New Best Practices

This session will provide a focused and dynamic discussion of what campus leaders need to understand from the Penn State tragedy. The attention of the entire nation was captured in late 2011 when Pennsylvania's Attorney General filed 40 criminal charges against J. Sandusky. Now, in the wake of the Freeh report (July 2012) and the promulgation of state, NCAA, and other penalties and regulations, what do business officers need to know about the changing landscape of institutional governance, athletics, providing an open campus for use by community and other groups, and risk management to best serve their campuses and the many different types of people who populate them? Two national experts with deep experience serving higher education will provide their perspectives.



Janice Abraham joined United Educators (UE) Insurance as president and CEO in 1998. In leading UE, she is responsible for developing and executing business strategy and operational plans for the risk management and insurance company. During her tenure, UE has become known as the premier risk management and liability insurance expert serving educational institutions, offering in-depth expertise on the unique risks and claims facing education. The company has grown to serve more than 1,200 schools, colleges, and universities. Abraham has testified before Congress and the Treasury Department on insurance issues and writes and speaks frequently on strategic issues affecting educational institutions and the insurance industry. In addition, she is a former president of WACUBO and a past member of the board of directors of NACUBO and the National Risk Retention Association.



Janet P. Judge is president of Sports Law Associates LLC, where she concentrates her practice on intercollegiate sports, employment and social media law counseling. She brings her legal and diverse collegiate athletic experiences to the table when advising and representing colleges and universities on a wide variety of general employment and sports specific issues, including Office for Civil Rights (OCR) investigations, strategic program development, National Collegiate Athletic Association (NCAA) eligibility, infractions and certification cases, social media, EADA

compliance, contract negotiation, pay equity analysis, Title IX compliance, harassment, hazing, academic fraud and athlete misconduct. She conducts internal investigations, drafts policy, conducts training and works with institutions to develop best practices around Title IX compliance issues, both school-wide (harassment, including sexual violence) and specific to athletics (programmatic).



TRACK: FINANCING THE ENTERPRISE

Tuesday – June 4, 2013

4:00-5:15 p.m. General Session II

James L. Doti, Ph.D., President, Chapman University

The Economy and Value Creation in Higher Education

In 1978, Jim Doti and his students developed the first quarterly econometric model for a metropolitan area—the Chapman Econometric Model. The model continues to be used as a teaching tool at the university, with students actively involved in developing the forecasts that are presented at the Economic Forecast and Economic Forecast Update conferences. The Chapman Economic Forecast was one of only two research centers in the United States to forecast both the start of the 2007 Great Recession and also the beginning of, and nature of, the gradual recovery. Chapman's forecast is the longest running economic forecast in the nation. In this session, Jim Doti will provide a macro economic forecast of major trends in the United States and around the world, including implications for higher education—tuition (pricing, net tuition), fundraising, and the economic health of the sector. He will also share the results of his most recent research into the factors that explain value creation in higher education.



James L. Doti has been president of Chapman University since 1991. He earned his bachelor's degree in economics from the University of Illinois, Chicago, and his master's and doctorate degrees in economics from the University of Chicago. His articles have appeared in academic journals as well as periodicals such as *The Wall Street Journal* and *The Chronicle of Higher Education*. He is the co-author of two econometrics texts and co-editor of a collection of readings in free enterprise that received the Templeton Honor Award for Scholarly Excellence. A champion of the liberal arts and sciences, President Doti is the founder of Chapman University's A. Gary Anderson Center for Economic Research, holds the Donald Bren Distinguished Chair in Business and Economics and is an avid reader. He is also a children's book author, mountain climber, marathon runner and passionate Panther.



TRACK: RUNNING THE CAMPUS
 Wednesday – June 5, 2013

8:30-10:00 a.m. General Session III

Dean Currie, V.P. for Business and Finance at the California Institute of Technology

Julia Stiglitz, Director, Business Development and Partnerships, Coursera

Karen Symms Gallagher, Ph.D., Dean, University of Southern California Rossier School of Education

Is Disruptive Change At Hand? Higher Education and Massive Open Online Courses (“MOOCs”)

Coursera is an online company that offers massive open online courses, or MOOCs. In partnership with top national universities, Coursera delivers recorded courses taught by professors from these institutions, available online for anyone to take, for free. In recent developments, Coursera, EdX and other MOOC providers are signaling steps to offer courses for transferable credit. Many industry observers believe that MOOCs represent genuine disruptive change for higher education both in the United States and internationally. Coursera’s Director of Business Development and Partnerships Julia Stiglitz and Dean Currie, representing Coursera investor Cal Tech, will discuss the most recent developments at the world’s largest MOOC. Joining the conversation will be Dr. Karen Symms Gallagher, USC’s Dean of Graduate Education. USC has recently stated that it will not join the MOOC movement, noting instead that it will offer certain graduate programs through small online courses. Will MOOCs change the higher education landscape? Participants in this session will learn about the business model for these enterprises and will be able to help prepare their campuses for how that model will affect traditional higher education institutions.



Dean W. Currie is the Vice President for Business and Finance at Caltech. As the Institute’s primary finance officer since 2005, Dean Currie oversees a diverse group of operations that serves many constituents, among them faculty, students, staff, donors, and government agencies. These services include supporting research activities; maintaining, renovating, and building facilities; managing Institute finances; and creating a safe and secure campus environment. Currie also acts as the primary administrative contact with Caltech’s

faculty club, the Athenaeum. Prior to coming to Caltech, Currie was Vice President for Finance and Administration at Rice University (1989-2004) and was the Associate Dean for Administration and Policy Planning at Harvard University’s Graduate School of Business Administration (1980-1988).



Julia Stiglitz leads business development and strategic partnerships at Coursera. Before Coursera she managed the North America sales and global community management team for Google Apps for Education. In this role she helped to grow Google Apps for Education to over 18m active students, faculty and staff and 70% of the top 100 U.S. universities. Julia started out as a fourth grade teacher in East San Jose through Teach For America. She went on to manage new teachers as a

Program Director for Teach For America in the Bay Area. Julia holds a BA from Pomona College, a MBA from Stanford Graduate School of Business, and a MA in education from Stanford University.



Karen Symms Gallagher. Since becoming Dean of the USC Rossier School of Education in 2000, Dean Gallagher has led the school in its mission of improving learning in urban education locally, nationally and globally. Under Dean Gallagher’s leadership, the USC Rossier School has risen to #15 among all universities in U.S. News & World Report national rankings. In 2009, the Rossier School, under Dean Gallagher, launched its groundbreaking online Master of Arts in Teaching degree, the first of its kind from a major research university. Dean Gallagher is also a leader of the Rossier team that opened USC Hybrid High School in September 2012. This LAUSD public charter school, of which the Dean chairs the oversight board, uses personalized curricula, technology, and flexible schedules to serve a population of students most at risk of dropping out. The Dean led her faculty in the design of its revolutionary Ed.D. program, now a national model, whose students tackle real problems of practice in schools and districts. Dean Gallagher was awarded the 2010 Los Angeles Urban League’s Social Responsibility Award, and in 2011 the Phi Delta Kappa International Service Key by the USC chapter of PDK. She was named to the 2013 cohort of Pahr-A-Aspen Fellows, a highly selective group of two dozen national education entrepreneurs and reform leaders. She is the first Dean of a school of education to be included. In addition, Dean Gallagher was recently awarded USC’s inaugural Provost’s Prize for Innovation in Educational Practice, which cites her exceptional achievement in building the university’s reputation as a pioneer in online education.



wacubo 2013 Annual Meeting Schedule of Events

Friday, May 31

8:00 a.m. – 3:00 p.m.

Wacubo Board Meeting

Saturday, June 1

9:30 a.m. – 2:30 p.m.

Optional Pre-Conference Workshop

“Preparing for Challenges Ahead”

Registered Participants: \$20.00

(Includes lunch and materials)

Join us for an interactive workshop which focuses on some of the major challenges facing higher education institutions—especially small institutions. Speakers will help attendees better understand higher education economic issues and will assist attendees in better preparing to have those “difficult conversations” which are sometimes required in personnel management. The lunch hour will be devoted to providing opportunities to meet and interact with representatives from other similar campuses. While the program is being offered by the WACUBO Small Institutions Committee, all WACUBO attendees are invited to participate. Bus service will be provided and will depart from the Captain Cook Hotel at 9:30 a.m. and will return by 2:30 p.m. Please come prepared to ask questions and share your experiences, success and challenges.

9:00 a.m. – 3:00 p.m.

Registration

9:00 a.m. – 3:00 p.m.

Cyber Cafe

Sunday, June 2

6:30 a.m. – 1:30 p.m.

Glacier Quest Cruise

Glacier Quest Cruise on Blackstone Bay

Member \$100

Children 2-11 \$100

Business partners and guests \$165

Children under 2 – Free

Special for WACUBO conference attendees, this once-in-a-lifetime charter will take you on a tour of Alaska’s magnificent Blackstone Bay in world-famous Prince William Sound, home to seven glaciers and Yosemite-scale waterfalls. This tour will allow you to see the towering cliffs of the massive tidewater glaciers of Alaska, and offers some of the most magnificent vistas available anywhere in the world.

The cruise also offers the opportunity to observe many different kinds of Alaskan wildlife, including sea otters, orca/killer whales, humpback whales, bears, mountain goats, sea lions, Dall’s porpoise, and thousands of birds including majestic bald eagles. We encourage you to take advantage of the opportunity to experience the grand Alaskan wilderness during your stay!

8:00 a.m. – 5:00 p.m.

Registration

8:00 a.m. – 5:00 p.m.

Cyber Cafe

2:30 – 4:00 p.m.

Information Exchange Opening Event and Ice Cream Social
Sponsored by: PFM (Public Financial Management)

5:00 p.m. – 6:00 p.m.

Newcomers Reception at the Anchorage Museum
Sponsored by: TIAA-CREF

6:00 p.m. – 10:00 p.m.

Opening Reception & Dinner at the Anchorage Museum
Sponsored by: Follett Higher Education Group



wacubo 2013 Annual Meeting Schedule of Events

Monday, June 3

Monday, June 3

7:00 a.m. – 4:30 p.m.

Registration

7:00 a.m. – 4:30 p.m.

Cyber Café

7:00 – 8:15 a.m.

Information Exchange Continental Breakfast
Sponsored by: Commonfund

8:15 – 8:30 a.m.

Welcome Address featuring Tom Case, Chancellor, University of Alaska Anchorage
Sponsored by: ARAMARK

8:30 a.m. – 9:45 am

Keynote Session I



TRACK: CULTIVATING LEADERSHIP

The Adventure of Change

Jeff Salz, Author, Motivational Speaker, Anthropologist, Thought Leader and Explorer and Guide

Adventurers and adventurous organizations are energized by uncertainty and adversity. Learn the secret of how to create the ultimate competitive advantage in times of change as Dr. Jeff Salz reveals and explains the Six Steps. Gleaned from 40 years of mountaineering, exploration and expedition leadership, these are the lessons that have been adopted by some of today's most successful teams and institutions.

9:45 a.m. – 10:45 a.m.

Information Exchange Refreshment Break
Sponsored by: Chartwells Educational Dining Services

10:45 a.m. – 12:00 p.m.

Concurrent Session 1



TRACK: ADVANCING WITH TECHNOLOGY

Technology Anybody? (Strategic Planning—Not Just for the Budget and Planning Folks)

Bill Zoumadakis, CIO/CISO, Salt Lake Community College

What drives technology at your institution? Does your academic and business vision help define your information technology strategic plan? Come and see how Salt Lake Community College integrates their Technology Strategic Plan with institutional vision. Please come prepared to discuss and share your own institution's strategic methods of implementing current and future technologies.

Concurrent Session 2



TRACK: CULTIVATING LEADERSHIP

Toxic Employees in the Workplace: Managing Your Frenemies

Kathleen A. Rinehart, General Counsel, Saint Xavier University

This session will address the skills and tools that you need to successfully manage challenging employees. The session will cover legal limitations upon discipline or removal of disturbing or disturbed employees ("direct threat" and other scenarios), fitness for duty exams, EAP referrals, "last chance" agreements, leaves, progressive discipline, problems with faculty, and mediation/ADR options. It will touch on strategies for maintaining a productive work environment by providing advice from the trenches.

Concurrent Session 3



TRACK: FINANCING THE ENTERPRISE

The Enrollment Calculus (Tuition Discounting)

*Natalie Pullaro, Manager, Research and Policy Analysis, NACUBO
James L. Doti, Ph.D., President, Chapman University, and author of various articles about tuition discounting including "College Tuition and Fees at Independent Institutions: The Real Facts" (NACUBO: Perspectives)*

Tuition discounting strategies continue to be utilized at nearly all types of higher education institutions. Since the early 1990s, colleges and universities have reduced the price of tuition via institutional grants to attract and retain students who cannot or will not pay the full sticker price to attend. With increasing national scrutiny of college and university pricing behavior by students, parents, state and federal legislators and the federal administration, knowing, explaining and managing discounting trends is a key business officer responsibility. This session will provide an update from the data-rich and long-running NACUBO Tuition Discounting study, focusing on data from WACUBO institutions and placing those data in the context of national trends.

wacubo 2013 Annual meeting schedule of events

Monday, June 3



Concurrent Session 4—Tales from the Front

TRACK: PLANNING AND BUDGETING

Administrative and Resource Management, Budget and Institutional

Kelly Ratliff, Associate Vice Chancellor for Budget and Institutional Analysis, Univ. of CA, Davis

Jason Stewart, Principal Budget Analyst, Univ. of CA, Davis

David Maddox, Principal, Resource Planning and Management Associates

When general funds from the state of California fell by 34 percent from 2007-08 to 2011-12, UC Davis Chancellor Linda P.B. Katehi identified the need for a new campus budget model that would provide incentives in line with the tough new funding environment. Given the speed of the changes in funding, UC Davis needed this budget model as soon as possible. In 16 short months, UC Davis designed and implemented the first phase of a budget model that fundamentally changed the way in which revenue — from students, taxpayers, and research sponsors — flowed to campus units and also decentralized the employee benefits pool and implemented the University of California's systemwide funding assessment program. Kelly Ratliff and Jason Stewart from UC Davis, along with David Maddox of RPM Associates, will describe how a campus can draw on different strategies to make rapid change in something as fundamental as its resource allocation model, and will also discuss the inevitable challenges we have faced, and take stock of our success and progress.

12:00 p.m. – 1:30 p.m.

WACUBO Business Meeting and Presentation by NACUBO

National Update from NACUBO

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.

Sponsored by: Union Bank

1:30 p.m. – 2:15 p.m.

2:00 p.m. – 3:15 p.m.



Dessert with our Business Partners

Sponsored by: TBA

Concurrent Session 5

TRACK: FINANCING THE ENTERPRISE

New Frontiers for Long-term Debt

Rick Chisholm, Managing Director, Education & Nonprofit Group, Wells Fargo Securities

Don Lipkin, Managing Director, Municipal Trading-Credit Strategy, Wells Fargo Securities

Edie Behr, Vice President/Senior Credit Officer and Manager, Higher Education & Not-for-Profit Team, Public Finance Group, Moody's Investors Service

The 2008 financial crisis cost American taxpayers \$12.8 trillion. In the wake of the crisis, there have been significant shifts in the way higher educational institutions access capital. New financing structures have been developed in response to bank downgrades, Basel III capital requirements, fixed income fund flows, low interest rates and narrow spreads between tax-exempt and taxable markets. Using a roundtable format, we will explore the latest financing techniques including taxable debt, floating rate notes with various put structures, century bonds, private placement loans and public private partnerships. By bringing investment bankers, investors, credit providers, and rating agencies to the table we will evaluate the depth of these new markets and the viability of various structures for specific types of higher educational borrowers.

Concurrent Session 6



TRACK: DOING THE NUMBERS

GASB-Reporting Institutions' Accounting Update

Mary Fischer, Professor of Accounting, The University of Texas at Tyler

Mary Fischer returns to the Annual Conference to provide an update on GASB and other accounting policies and best practices that affect publicly financed institutions. She and the audience will discuss the impact of changes in old standards and the introduction of new standards on college and university accounting practices and

wacubo 2013 Annual meeting schedule of events

Monday, June 3

reporting. Based on last year's evaluations, GASB is now a stand-alone session. Please see Concurrent Session 11 for the FASB update.

Concurrent Session 7



TRACK: RUNNING THE CAMPUS **Ethical Business Practices**

Joanne Ciulla, Professor, Coston Family Chair in Leadership & Ethics, University of Richmond

Campuses continue to be challenged on multiple fronts by forces compromising their ethical business practices. Business officers are responsible for personnel in the areas of accounting, financial services, facilities, human resources, and procurement, among others. Many of our colleagues are primarily responsible for reputational and other institutional risk administration for the campuses they serve. In this session, researcher and author of the books "Ethics, the Heart of Leadership" and "The Ethics of Leadership" Dr. Joanne B. Ciulla will focus on how leaders successfully influence business ethics within their organizations.

Concurrent Session 8 — Tales from the Front



TRACK: FOSTERING ORGANIZATIONAL EFFECTIVENESS **Lessons Learned from a Full-scale Shared Services Model Implementation**

Aaron D. Howell, CPA, Director of Business Affairs, Oregon State University

Tom Fenske, Health Sciences Business Center Manager, Oregon State University

Shared Services has proven to be the model for the future as institutions continue to struggle to find a way to provide best-practices support in an era of continually-tightening budgets. Oregon State University's ("OSU") model, the Business Centers ("BC"), began with a 4-year implementation process in 2007 and continued through the summer of 2011. Now every individual unit on OSU's campus is represented by a BC. The BCs now handle almost all transactional efforts in administrative support associated with

accounting, finance, budgeting and human resources. This presentation will answer those questions as well as providing for a highly interactive, audience driven information session. This session will be of great benefit to institutions that are considering a shared services model, and those that are beginning to implement one.

3:30 p.m. – 4:45 p.m.



General Session I

TRACK: RUNNING THE CAMPUS **The Continuing Impact of the Penn State Tragedy: Lessons Learned and New Best Practices**

Janice Abraham, CEO, United Educators

Janet Judge, President, Sports Law Associates, LLC

This session will provide a focused and dynamic discussion of what campus leaders need to understand from the Penn State tragedy. The attention of the entire nation was captured in late 2011 when Pennsylvania's Attorney General filed 40 criminal charges against J. Sandusky. Now, in the wake of the Freeh report (July 2012) and the promulgation of state, NCAA, and other penalties and regulations, what do business officers need to know about the changing landscape of institutional governance, athletics, providing an open campus for use by community and other groups, and risk management to best serve their campuses and the many different types of people who populate them? Two national experts with deep experience serving higher education will provide their perspectives.

4:45 p.m. – 5:45 p.m.

Information Exchange — Wine & Cheese Reception
Sponsored By: Clark Nuber

5:30 p.m. – 6:30 p.m.

Constituent's Reception
Sponsored By: TBA

6:30 p.m. – 8:30 p.m.

Dinner On Your Own

8:30 p.m. – 11:00 p.m.

Follett's Sweets In The Suite
Sponsored by: Follett Higher Education Group

wacubo 2013 Annual Meeting Schedule of Events

Tuesday, June 4

Tuesday, June 4

8:00 a.m. – 4:00 p.m. Registration

8:00 a.m. – 4:00 p.m. Cyber Café

7:45 a.m. – 8:45 a.m. Grab 'N' Go Breakfast
at the Captain Cook and the Hilton

9:00 a.m. – 10:15 a.m. Keynote Session II



TRACK: THE NATIONAL AGENDA

The Spellings Commission and Higher Education in America Today

Margaret Spellings, President and CEO, Margaret Spellings and Company, and Former U.S. Secretary of Education

Ralph Wolff, President and CEO, Senior College Commission of the Western Association of Schools and Colleges

John Walda, President and CEO, NACUBO

In many ways the final report of the Commission on the Future of Higher Education (also known as “The Spellings Commission”), published in 2006, set the course for U.S. Higher Education. Both substantive and controversial, this report – “A Test of Leadership: Charting the Future of U.S. Higher Education” – continues to have impact. U.S. Secretary of Education Margaret Spellings assembled the 19 member commission in September, 2005. The final report focused on access, affordability, standards of quality and accountability for colleges and universities, which remain, arguably, the key areas of focus for Congress and the U.S. Education Department today. One area deeply impacted by the report is regional accreditation. WACUBO welcomes Secretary Spellings to the Conference. She will present her thoughts on the current state of higher education, and then she will be joined by the President and CEO of WASC – The Senior College Commission Ralph Wolff in a discussion that will be moderated by NACUBO President John Walda.

10:15 a.m. – 11:00 a.m. Information Exchange Break
Sponsored By: Standard and Poors

11:00 a.m. – 12:00 p.m.



Concurrent Session 9

TRACK: RUNNING THE CAMPUS

Making Metrics Matter: How to Use Indicators to Govern Effectively

Robert Dickeson, President Emeritus, University of Northern Colorado

How should leadership in institutions of higher education think about prioritizing academic and administrative programs in a time of limited and constrained resources? How can one meaningfully compare very different programs and support functions and strategically balance the investment in each? Robert Dickeson, the President Emeritus of the University of Northern Colorado, together with Stan Ikenberry has written what is considered to be the key resource for this kind of analysis—“Prioritizing Academic Programs and Services.” This session will focus on the key structure for such a review, and how to implement the results so that the institution is able to move ahead with its mission.

Concurrent Session 10



TRACK: RUNNING THE CAMPUS

Exploring the Upside of Risk: Using Intelligent Decision-Making to Achieve Your Institution's Objectives

Paul Pousson, Associate Director of the Office of Risk Management, University of Texas System

Paul D. Pousson, ARM, is Associate Director of the Office of Risk Management for The University of Texas System. He is responsible for administering the risk management, environmental health and safety, emergency management, and property and casualty insurance services offered to the fifteen (15) institutions of The University of Texas System. Business Officers for many WACUBO member institutions find themselves responsible for enterprise risk management. This task is daunting, with constant reminders in the press of the ways in which colleges and universities are challenged to handle institutional risk professionally and well. In this

wacubo 2013 Annual meeting schedule of events

Tuesday, June 4

session, Pousson will discuss the use of risk intelligent decision making to achieve your institution's objectives.

Concurrent Session 11



TRACK: DOING THE NUMBERS

FASB-Reporting Institutions' Accounting Update

Kim Kvaal, Associate Vice President of Accounting and Business Services, University of San Francisco

Kim Kvaal from the University of San Francisco returns to the Annual Conference to provide an update on FASB and other accounting policies and best practices that affect independent institutions. She and the audience will discuss the impact of changes in old standards and the introduction of new standards on college and university accounting practices and reporting. Based on last year's evaluations, FASB is now a stand-alone session. Please see Concurrent Session 6 for the GASB update.

Concurrent Session 12



TRACK: FINANCING THE ENTERPRISE

Financial Reality, Rhythm and Rigor: UC Berkeley's Campus-wide Finance Transformation

Jon Bain-Chekal, Director, Financial Planning and Analysis Outreach, University of California, Berkeley

Erin Gore, Assoc. Vice Chancellor & CFO, University of California, Berkeley

Laurent Heller, Exec. Director, Campus Budget Office, University of California, Berkeley

During Chancellor Birgeneau's tenure at UC Berkeley, state funds have dropped in half and now represent around 12% of campus revenues. While this economic downturn was not the first that Berkeley faced, it was different. With California's large structural deficit and long queue of underfunded "mandates" (e.g K-12, infrastructure, pensions), it became apparent Berkeley would see future cuts in state funding. The campus also realized that even when state revenues recover, UC Berkeley would not be first in line to receive additional funding. In this session, Erin Gore, Laurent Heller, and Jon Bain-Chekal discuss the multi-pronged approach

employed by UC Berkeley's leadership to meet the fiscal challenge that involves constituents at all levels: Federal and State Governments, the UC System, and Berkeley's own campus.

Concurrent Session 13—Tales from the Front



TRACK: ADVANCING WITH TECHNOLOGY

How to Win Users and Influence Decision-makers: The Story of a Man and His Blog

Normandy Roden, Director of Finance and Procurement Business Services, Office of University Controller, University of Colorado

Think of your most important projects or initiatives. Have you ever stumbled in 2-way communications with your constituents? Whatever the issue, you probably needed to be able to do most of the following: present a vision for the future, answer specific questions, receive input from affected individuals, build consensus, and present status updates through project completion. And you probably found all this very hard to do. Now, consider how a blog can help. In this session, you'll learn how the University of Colorado used free WordPress software to create *Carl's m-Fin blog*. Carl, the University's Associate Director for Reporting Systems, used this social media tool to explain report development, share sample reports, and ask for feedback. People began to read, respond, and get hooked. For our users, the blog is not only enhanced communication/training—it is transparency and accountability in action. For Carl and our office, the blog provides increased productivity, enhanced customer service, professional development...and recognition. Our successes—in terms of communication, collaboration, customer service, public relations, and staff development—far exceeded our expectations. In fact, Carl's blog has been so valuable in its widespread impact and consciousness-raising that we may adopt a blog approach for other financial policy initiatives in future. The blog approach can work for all of you at your own higher education institutions. You, too, can combine technology and innovative thinking to change entrenched organizational behavior.

wacubo 2013 Annual meeting schedule of events

Tuesday, June 4

12:00 p.m. – 2:15 p.m.

Member Appreciation Luncheon featuring Martin Buser
Sponsored By: TBA

Back by popular demand, four-time iditarod dog-sled champion Martin Buser will be featured at the Member Appreciation Luncheon. Buser is known throughout Alaska not only for his success in racing, but also for his sense of humor, positive outlook, and strong involvement in rural Alaskan communities. Don't miss out on the photo opportunity with Buser and his champion sled dogs! Please take advantage of the chance to relax, and join us in offering enthusiastic thanks to WACUBO members, conference attendees, guests and sponsors. This lunch is our opportunity to extend an Alaskan thank-you to each of you for your continuing support and participation in WACUBO.

2:15 p.m. – 3:15 p.m.



Concurrent Session 14

TRACK: CULTIVATING LEADERSHIP

Career Advice from Across the Region: A Panel of Chief Business Officers

Dean Currie, V.P. for Business and Finance, the California Institute of Technology

Erin Gore, Associate Vice Chancellor and CFO, University of California, Berkeley

Gregg Goldman, Senior Associate Dean & CFO, University of Southern California Marshall School of Business

Sally Roush, V.P. of Business and Financial Affairs, San Diego State University

Morgan Olsen, Executive V.P., Treasurer and CFO, Arizona State University

Patty Charlton, Senior VP, Finance and Administration, College of Southern Nevada

This panel of very experienced business officers will share insights into their responsibilities on the college/university campus and discuss the evolving role of college and university Chief Business Officers to provide a toolbox for new and aspiring CBOs. The panel will also take questions from the floor regarding the profession and what it takes to be successful in the

field. This CBO panel responds to suggestions from last year's Annual Conference participants requesting sessions on career paths and career advice.

Concurrent Session 15



TRACK: ADVANCING WITH TECHNOLOGY

Social Networking and the Business Officer

Dr. DP Harris, Vice President of Information Systems, Loma Linda University

In this session, Dr. DP Harris of Loma Linda University will examine the established phenomena of social media. The session will explore current uses and emerging trends in professional networking, university marketing and employee engagement. We will explore which Social Media solutions are on the rise, which ones are stable, and which ones are waning, ultimately seeking to answer the question, is it right for me? Is it right for my university?

Concurrent Session 16



TRACK: SUSTAINABILITY

UC Davis West Village and the GATEways Project: Environmental and Financial Sustainability in Action

Bob Segar, Assistant Vice Chancellor for Campus Planning, UC Davis

In this presentation, Assistant Vice Chancellor of Campus Planning and Community Resources at UC Davis, Bob Segar, will share two strategies at UC Davis to create new campus assets that assist in the recruitment of faculty, staff and students, improve the quality of the built environment and further the environmental and financial sustainability of the institution. At the core of each example is a model that brings business units in closer collaboration with the academic strengths of the UC Davis campus.

wacubo 2013 Annual Meeting Schedule of Events



Concurrent Session 17 — Tales from the Front

TRACK: PLANNING AND BUDGETING Stewarding Campus Facilities: Tackling Deferred Maintenance

Harold Hewitt, Executive Vice President and Chief Operating Officer, Chapman University

James Kadamus, Vice President, Sightlines, LLC

The partnership between Chapman University and Sightlines LLC has provided Chapman's trustees with a smart and credible tool for analyzing future claims on institutional resources to address strategically the university's growing deferred maintenance challenge. As a result, Chapman University committed to fully funding depreciation. They removed operational need from capital budgets and dedicated themselves to stewarding and staying ahead of the deferred maintenance burden, rather than have to catch-up at a later date at a much higher cost. Chapman was able to see benefits – lower operating costs, able to stretch maintenance staff to cover more space and improved service processes to serve campus customers. In addition, Sightlines will share new methodologies recently developed to predict the life cycles needs of buildings as a basis for determining future stewardship needs and funding. Participants will learn how to forecast when costs of buildings are coming due in relation to the institutional budget process.

3:15 p.m. – 4:00 p.m.

Information Exchange Break and Prize Drawing
Sponsored By: TBA

4:00 p.m. – 5:15 p.m.

General Session II



TRACK: FINANCING THE ENTERPRISE The Economy and Value Creation in Higher Education

James L. Doti, Ph.D., President, Chapman University

In 1978, Jim Doti and his students developed the first quarterly econometric model for a metropolitan area— the Chapman Econometric Model. The model continues to be used as a teaching tool at the university, with students actively involved in developing the forecasts that are

6:45 p.m. – 7:45 p.m.

presented at the Economic Forecast and Economic Forecast Update conferences. The Chapman Economic Forecast was one of only two research centers in the United States to forecast both the start of the 2007 Great Recession and also the beginning of, and nature of, the gradual recovery. Chapman's forecast is the longest running economic forecast in the nation. In this session, Jim Doti will provide a macro economic forecast of major trends in the United States and around the world, including implications for higher education—tuition (pricing, net tuition), fundraising, and the economic health of the sector. He will also share the results of his most recent research into the factors that explain value creation in higher education.

Annual Reception

Sponsored by: George K. Baum & Co.

7:45 p.m. – 10:45 p.m.

Annual Banquet & Dance with music from a local Alaskan dance band

Sponsored by: Barnes & Noble

Wednesday, June 5

7:30 a.m. – 8:15 a.m.

Board of Directors Meeting

7:45 a.m. – 8:30 a.m.

Breakfast Buffet

8:30 a.m. – 10:00 a.m.

General Session III



TRACK: RUNNING THE CAMPUS

Is Disruptive Change At Hand? Higher Education and Massive Open Online Courses (“MOOCs”)

Dean Currie, V.P. for Business and Finance at the California Institute of Technology

Julia Stiglitz, Director of Business Development and Partnerships, Coursera

Karen Symms Gallagher, Ph.D., Dean, University of Southern California Rossier School of Education

Coursera is an online company that offers massive open online courses, or MOOCs. In partnership with top national universities, Coursera delivers recorded courses taught by professors from these institutions, available online for anyone to take, for free. In recent developments,

Wednesday, June 5

Coursera, EdX and other MOOC providers are signaling steps to offer courses for transferable credit. Many industry observers believe that MOOCs represent genuine disruptive change for higher education both in the United States and internationally. Coursera Director of Business Development and Partnerships Julia Stiglitz and Dean Currie, representing Coursera investor Cal Tech, will discuss the most recent developments at the world's largest MOOC. Joining the conversation will be Dr. Karen Symms Gallagher, USC's Dean of Graduate Education. USC has recently stated that it will not join the MOOC movement, noting instead that it will offer certain graduate programs through small online courses. Will MOOCs change the higher education landscape? Participants in this session will learn about the business model for these enterprises and will be able to help prepare their campuses for how that model will affect traditional higher education institutions.

Sponsored by: Edward Jones

10:15 a.m. – 11:30 a.m.

Keynote Session III



TRACK: CULTIVATING LEADERSHIP

Drive: What the Science of Motivation Can Teach You About High Performance

Daniel Pink, Author and Journalist

Daniel Pink, best-selling author of *A Whole New Mind*, uses four decades of behavioral research to reveal why the traditional approach to high performance backfires on most organizations. In a provocative and entertaining presentation, members will see how many common organizational incentives often go wrong—and can reduce both creativity and satisfaction on the job. Participants will learn that the people who do what they do because of enjoyment of the task itself routinely outperform those who are motivated by external rewards. With examples from cutting-edge companies and intriguing experiments around the world, audiences will learn the three key ingredients of intrinsically-motivated high performers—and demonstrate how organizations can create contexts that tap our deepest motivations to produce the highest results.

11:30 a.m. – 12:00 p.m.

Closing Remarks/Drawings



conference information

WACUBO's 75th Annual Meeting is located at:
Egan Convention Center
555 W. Fifth Avenue, Anchorage, Alaska 99501

Hotel Reservations

Please note that there are two nearby hotels offering conference rates available for your convenience.



Hotel Captain Cook

939 West 5th Avenue, Anchorage, Alaska 99501
Reservations Contact:
Phone: (800) 843-1950
www.captaincook.com

Located in Downtown Anchorage, each of the Hotel Captain Cook's 547 luxury accommodations of rooms and suites offer a stunning view, whether it's of the neighboring Cook Inlet or the Chugach Mountains. The Captain Cook is Alaska's member of Preferred Hotels and Resorts.

Please make reservations directly with the Hotel Captain Cook by calling 1-800-843-1950 or using the following web link: <http://bit.ly/RmengQ>. WACUBO's single/double rate is \$179 plus tax. This rate includes complimentary wireless internet access, complimentary access to the hotel's health club, and a discounted self-park rate of \$18 per day.

Please identify yourself as a member of WACUBO when you are making the reservations to inquire about room block availability—this will ensure the conference rate. *The conference runs June 2-5, 2013. This rate is good for the period May 27, 2013 through June 8, 2013 (subject to room availability)* to allow members to extend their trip in Anchorage and the surrounding area.



Hilton Anchorage

500 West 3rd Avenue, Anchorage Alaska 99501
Reservations Contact:
Phone: (800) 445-8667
www.hiltonanchorage.com

The Hilton Anchorage hotel is located in the heart of downtown Anchorage. This hotel is within walking distance of the Alaska Railroad Depot and Anchorage Convention District. Explore Anchorage's popular attractions including the Alaska Museum of History and Art, the Ulu Factory, Nordstrom and the Fifth Avenue Mall—all only two blocks from the hotel.

Please make reservations directly with the Hilton by calling 1-800-445-8667 or using the web link provided above (under “Add Special Rate Codes,” type in ‘WACUBO’ in Group Code field to receive the conference rate). WACUBO’s single/double rate is \$189 plus tax. This rate includes complimentary wireless internet access, complimentary access to the hotel’s health club, and a discounted valet parking rate of \$20 per day.

Please identify yourself as a member of WACUBO when you are making the reservations to inquire about room block availability—this will ensure the conference rate. *The conference runs June 2-5, 2013. This rate is good for the period May 25, 2013 through June 11, 2013 (subject to room availability)* to allow members to extend their trip in Anchorage and the surrounding area.

Directions From Airport

Directions to Hotel Captain Cook

- Exit the Airport to West International Airport Road
- Go east on West International to Minnesota Drive
- Turn left on Minnesota, going north
- Proceed north on Minnesota, following the road as it turns into I Street.
- Proceed north on I Street until you reach 5th Avenue.
- Turn left on 5th Avenue, the hotel is on the right.

Directions to Hilton Anchorage

- Exit the Airport to West International Airport Road
- Go east on West International to Minnesota Drive
- Turn left on Minnesota, going north
- Proceed north on Minnesota, following the road as it turns into I Street.
- Proceed north on I Street until you reach 3rd Avenue.
- Turn right on 3rd Avenue, the hotel is on the right.

Transportation

Travel to Anchorage via Alaska Airlines

Platinum sponsor Alaska Airlines is the preferred airline for the 2013 Annual WACUBO Conference in Anchorage, Alaska.

WACUBO will be announcing special discounts and programs available to our members, through Alaska Airlines, for travel to our upcoming 2013 Conference.

Keep your eyes open for our announcements via email and our web site at: www.wacubo.org.

Taxis from Ted Stevens Anchorage International Airport

- Taxis pick-up and drop-off from the ground transportation island which may be reached via the underground transportation lobby or via the sidewalk outside baggage claim.
- The cost of a taxi ride from the airport to downtown is approximately \$25 and the ride takes approximately 15 to 20 minutes.
- Options:
Checker Cab (907) 276-1234
Yellow Cab (907) 222-2222

Other Conference Information

Conference Attire: Suggested attire for all sessions and meals, including the closing banquet, is business casual. Please wear your school colors and logo clothing as appropriate. Also, please note that Alaska weather can be unpredictable. We advise you to bring rain gear, a warm jacket, and to be prepared to dress in layers.



Registration

Early Bird Registration: April 22, 2013 is the deadline for WACUBO Institutional members to qualify for discounted rate. **Full payment must be submitted at the time of registration.**

Online Registrations: WACUBO will be introducing a new online registration process powered by NACUBO. You may notice a different look and feel including login passwords. It is available through our web page at <http://wacubo.org/Registration>. The secure shopping cart is available for all payment options. Most forms of credit cards such as Visa, MasterCard, and American Express are accepted. We do not accept registrations by mail/paper. If you have questions please contact Patricia Putnam, Associate Vice President, University of San Diego, 5998 Alcalá Park, San Diego, CA 92110; phone (619) 260-7430; fax (619) 260-4606; or email poliver@sandiego.edu. **Full payment must be submitted at the time of registration.**

Please note: Corporate partners and/or subscriber members must register through the Information Exchange Program—contact: Dean Calvo at (909) 607-3183 or email dean.calvo@cgu.edu.

Refunds: Request for refunds will be honored if received by May 1, 2013, by written notification to the address or fax number listed above for Patricia (Oliver) Putnam or by email to poliver@sandiego.edu. No refunds will be made after that date for any reason, but substitutions are permitted at any time. There is a \$50 fee for all cancellations (no cancellation fee for guests if the primary registrant is also canceling.) Please notify WACUBO registration in advance (if possible) at the email listed above regarding substitutions.

Cancellations: In the event of Annual Conference cancellation in whole or part, registrants will be notified as soon as possible by WACUBO. WACUBO is not responsible for any travel or other expenses incurred by any participant due to a program cancellation.

To register click here:
www.wacubo.org/registration

Thank you for your interest
and support of WACUBO!

sponsors and exhibitors

Corporate

Wells Fargo Bank

Platinum

Follett Higher Education Group
Arthur J. Gallagher
Wells Fargo Bank
Sodexo
Alaska Airlines

Gold

Barnes & Noble
Alliant Insurance Services
Bank of America
Sallie Mae

Silver

George K. Baum & Co.
Siemens
Moss Adams, LLP
Clark Nuber PS
Capstone Development Western Division
ARAMARK
General Communications, Inc.
American Campus Communities
Union Bank
ARAMARK
Fidelity
XEROX
GCSIT Solutions
United Educators
PFM—Public Financial Management

Bronze

Higher One
TIAA-CREF
BLX Group
Barclays Capital
Dell Computer
Konica - Minolta
Commonfund
Edward Jones
US Bank

Copper

Clifton Larson Allen
Grant Thornton, LLP
Standard and Poors
Nelnet Business Solutions
Wells Fargo Bank
Chartwells Educational Dining Services
Edward Jones
Barnes & Noble
Sightlines
BKD
Follett Higher Education Group
NUVEEN

Exhibitors

Administrative Resource Options
Akademos, Inc.
Alliant Insurance Services, Inc.
Aramark Higher Education
Aviands
Baker Tilly
Bank of America
Barnes & Noble College Booksellers
BKD, LLP
Canterbury Consulting
Capstone Development Western Division
Cbord Group, The
Chartwells Educational Dining Services
Clifton Larson Allen
Cornerstone Ondemand
Conserve
Cort
Diversified Investment Advisors
E&I Cooperative Service, Inc
Ecsi
Ellucian
Ewise—Secure Vault Payments
Fitch Ratings
Follett Higher Education Group
Fund Evaluation Group (Feg)
Gca Education Services
George K Baum & Company
Grant Thornton, LLP
HD Supply
Heartland Payment Systems Campus Solutions
Higher One Education
Hyland Software
Jenzabar
JP Morgan Chase
MCN
Millenium Computer Systems
Morgan Stanley Smith Barney
Moss Adams, LLP
National Education
Nelnet Business Solutions

Northern Trust
PE Systems
Peer Transfer
PFM
PNC Equipment Finance
RBC Capital Markets
Sallie Mae
Sightlines
Sodexo Education
SSC Service Solutions
TIAA CREF
Touchnet Information Systems, Inc.
Tuition Management Systems
U.S. Bank
Union Bank
University Lease
Valic
Wacubo Professional Development
Wells Fargo Bank
Wepa
Western Union Business Solutions
WTC Consulting, Inc

Please note: Participating exhibitors subject to change prior to February 29, 2013

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.

Planning is underway for the 2013 Business Management Institute, August 4-9, at the University of California at Santa Barbara. Questions about BMI...contact Institutes Director Pamela Hemann at pam@assnmgmt.net or (626) 449-4356.



Business Management Institute (BMI)

August 4-8, 2013

Summertime brings WACUBO's **Business Management Institute (BMI), August 4-8, 2013**. BMI offers a great way to capture the attention of today's and tomorrow's educational leaders, while having your company recognized as a leader in supporting higher education institutions.

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

BMI is a proven WACUBO professional development experience. In fact, 92% of the 188 attendees in 2012 said they would recommend BMI to a colleague!

And here are a few testimonials about their BMI experience:

My third year experience was extremely valuable. It really got to the actual challenges that each campus has and also highlighted the similarities across them.

This year's curriculum was the best one of the years I have ever attended. All of the classes were applicable to my current job. In addition, the speaker and the lecturers were excellent and engaging.

Great pace! Great location! Great Content!

"Inspire Integrity" was the best opening conference general sessions I've encountered at the BMI or any other conference I've attended.

BMI provides access to over 180 business, finance and administrative professionals from a wide range of institutions.

With four tracks of 30 to 70 participants per track, sponsorship of BMI offers a variety of options with a distinctive gathering in the higher education arena. Dedicated sponsorship is available for each one of the four tracks, three evening social events, and registration bags/packets. 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.

A special thank you for our brochure sponsor

