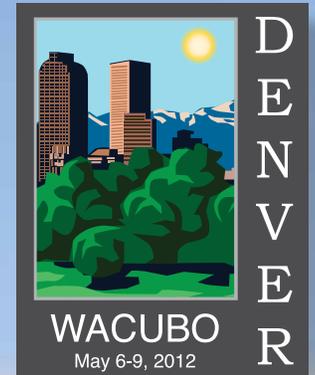


New Heights, New Vistas, New Horizons

WESTERN ASSOCIATION *of* COLLEGE AND UNIVERSITY BUSINESS OFFICERS | 2012



CONFERENCE PROGRAM

WESTERN ASSOCIATION *of*
COLLEGE AND UNIVERSITY BUSINESS OFFICERS
Conference Program 2012

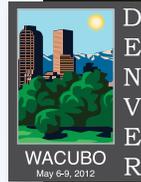


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WACUBO 2012 Board of Directors

BOARD MEMBERS

| | |
|--------------------------|---|
| President | Daniel Morris, College of Southern Nevada |
| First Vice President | Gregg Goldman, University of Southern California |
| Second Vice President | Paul Jenny, University of Washington |
| Secretary | Kori DeHaan, University of Utah |
| Treasurer | Jean Vock, University of Arizona |
| Communications | Stuart Roberts, University of Alaska, Fairbanks |
| At-Large Members | Sue Tavakoli, Estrella Mountain Community College Jeffrey Riddell, Cornish College of the Arts J. Michael Allred, University of California, Davis |
| National Representatives | Daniel Morris, College of Southern Nevada Charles Ingram, University of Arizona Dennis Klaus, Salt Lake Community College Cynthia Teniente-Matson, California State University, Fresno |

WACUBO PROGRAM COMMITTEE MEMBERSHIP

| | |
|-------|---|
| Chair | Paul Jenny, University of Washington Teresa Costantinidis, University of California, Berkeley Keith Foster, Community Colleges of Spokane Ruth Johnson, University of Washington Chris McAlary, Mount St. Mary's College Jan Parten, California State University, Fresno Robert Moore, Colorado College Sandra Uyeno, University of Hawaii Community Colleges Robyn Pennington, California State University Chancellor's Office Paul Phillip, Washington State University Jeff West, University of Utah |
|-------|---|

HOST COMMITTEE

| | |
|----------|---|
| Co-Chair | Robert Moore, Colorado College |
| Co-Chair | Kelly Fox, University of Colorado System Office Brian Burnett, University of Colorado at Colorado Springs Dean Calvo, Claremont Graduate University Tim Davenport, Eastern Washington University Lisa Douglas, University of Colorado Denver Judy Ganschaw, Arapahoe Community College (retired) Paul Jenny, University of Washington Monica Kane, University of Alaska, Anchorage Daniel Morris, College of Southern Nevada Dan Montez, University of Colorado System Office Patricia Putnam, University of San Diego Stuart Roberts, University of Alaska, Fairbanks Rich Schweigert, Colorado State University System Bill Spindle, University of Alaska, Anchorage Millie Vuksanovic, College of Southern Nevada Lyrae Williams, Colorado College Craig Woody, University of Denver |

INFORMATION EXCHANGE

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

Photo by Dave Falconer, VISIT DENVER

Greetings to all 2012 WACUBO Members and Friends!

The time has come to welcome members and friends to the 74th Annual Conference of the Western Association of College and University Business Officers (WACUBO) in “The Mile High City” of Denver, Colorado. Denver really is exactly one mile high. In fact, there is a step on the State Capitol Building that is exactly 5,280 feet above sea level. Denver has it all — with 300 days of sunshine, a walkable downtown, thriving arts and culture, an award-winning culinary scene, and the Rocky Mountains as a backdrop, Denver offers an affordable mix of urban sophistication and outdoor adventure. With its abundant fresh air, crystal clear blue skies and wide variety of natural wonders, it’s no wonder that Denver takes being “green” seriously.



Photo by Rich Grant, VISIT DENVER

WACUBO continues to promote its mission by maintaining professional standards through advancement and networking opportunities for everyone. All through 2011, enhanced workshops and seminars were offered to prospective participants to make sure that our mission was satisfied. With this year’s conference, we will introduce “New Heights, New Vistas, New Horizons” as our theme for bringing new and seasoned members together. This conference will be an experience overflowing with sessions that will fulfill your desires and prepare you for a concrete foundation that is sustainable in the future.

My experience as a former Chair for the Program Committee showed me how much work was involved in organizing and planning such a massive event. Such dedication is to be commended to the 2nd Vice President and the 2011 Program Committee Chair, Paul Jenny, Vice Provost, Office of Planning and Budgeting with the University of Washington and the committee members for the coordination and development of this year’s program. The committee has put together a wide range collection of professional development general sessions and concurrent sessions focusing on such areas as America’s best places to work, issues facing higher education, creating an academic business plan, building bridges, transcendent learning, working with faculty...just to name a few. The group has also reserved two dynamic keynote speakers to entertain and enlighten us.

Further gratitude goes out to the 2011 Host Committee which is under the leadership of Robert Moore from Colorado College, Kelly Fox from the University of Colorado System and with the assistance of Dan Montez from the University of Colorado System. They have planned innovative events to headline the conference venue, which includes a unique opportunity to network amongst your colleagues and friends, along with visiting some amazing and exciting sponsors and vendors. This committee has worked extremely hard to organize and coordinate the essentials for our location and to guarantee our community activities and entertainment to reflect the traditions Denver has to offer. The “History Colorado Center” will be this year’s opening event. This museum will open its doors in Denver’s Golden Triangle in April 2012. Upon entering this museum, you will walk on terrazzo-tile floors (which took 900 hours to hand craft by a local artist) that will express parts of art, geography and history. What an exciting time to venture out and explore exhibits and network with friends and colleagues!

In conclusion, I would like to give my thanks to Dean Calvo, Assistant Vice President/Assistant Treasurer of Claremont Graduate University, who serves as the Chair of the Information Exchange Program (IEP) Committee, the committee members, and finally, the Sponsors that continue to financially support WACUBO. Make sure you take the time to visit the vendors at the sessions throughout the conference.

Remember to attend the multiple sessions offered, enjoy the guest speakers and don’t forget to network with new and seasoned colleagues. I hope to meet some of you while I explore the conference at a “new” level of experience in Denver, Colorado!

Cordially,

Daniel D. Morris
WACUBO President

WACUBO Welcomes the Association of College and University Policy Administrators (ACUPA)

NEW AT THE WACUBO 2012 CONFERENCE: A POLICY TRACK (IN PARTNERSHIP WITH ACUPA)

Members of the Association of College and University Policy Administrators (ACUPA) will be joining the 2012 WACUBO Conference in Denver to present a new policy track to supplement WACUBO's outstanding conference program.

ACUPA will bring a wealth of policy information—from process and structure, to policy best practices, to specific experiences in tackling today's difficult policy issues facing our colleges and universities.

For more information on ACUPA, go to: www.acupa.org.

ACUPA membership includes over 130 institutions from across Colorado, the United States, and the world.

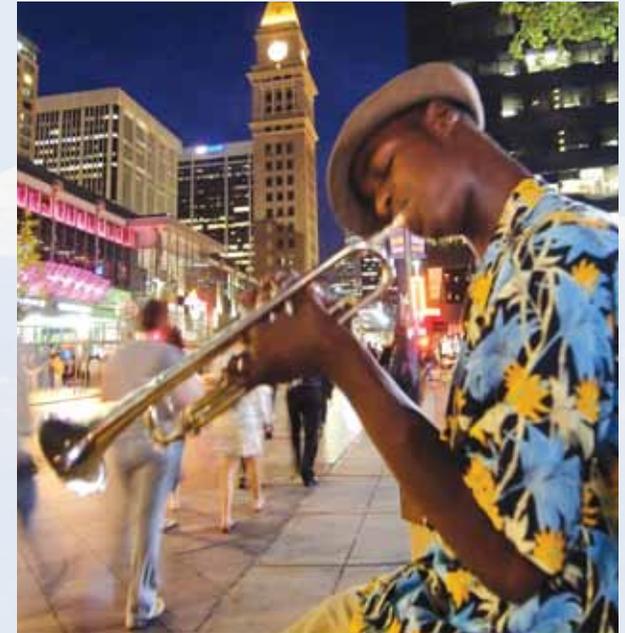


Photo by Steve Crecellius, VISIT DENVER

Member Institutions of the 2012 WACUBO/ACUPA Policy Track Planning Committee:

- Cornell University
- University of Minnesota
- University of California System
- The University of Texas at Austin
- University of Colorado System
- The University of Texas at San Antonio
- Indiana University

Local ACUPA Institutions Include:

- University of Colorado System
- University of Colorado, Boulder
- Colorado School of Mines
- Colorado State University
- Metropolitan State College of Denver
- Colorado College

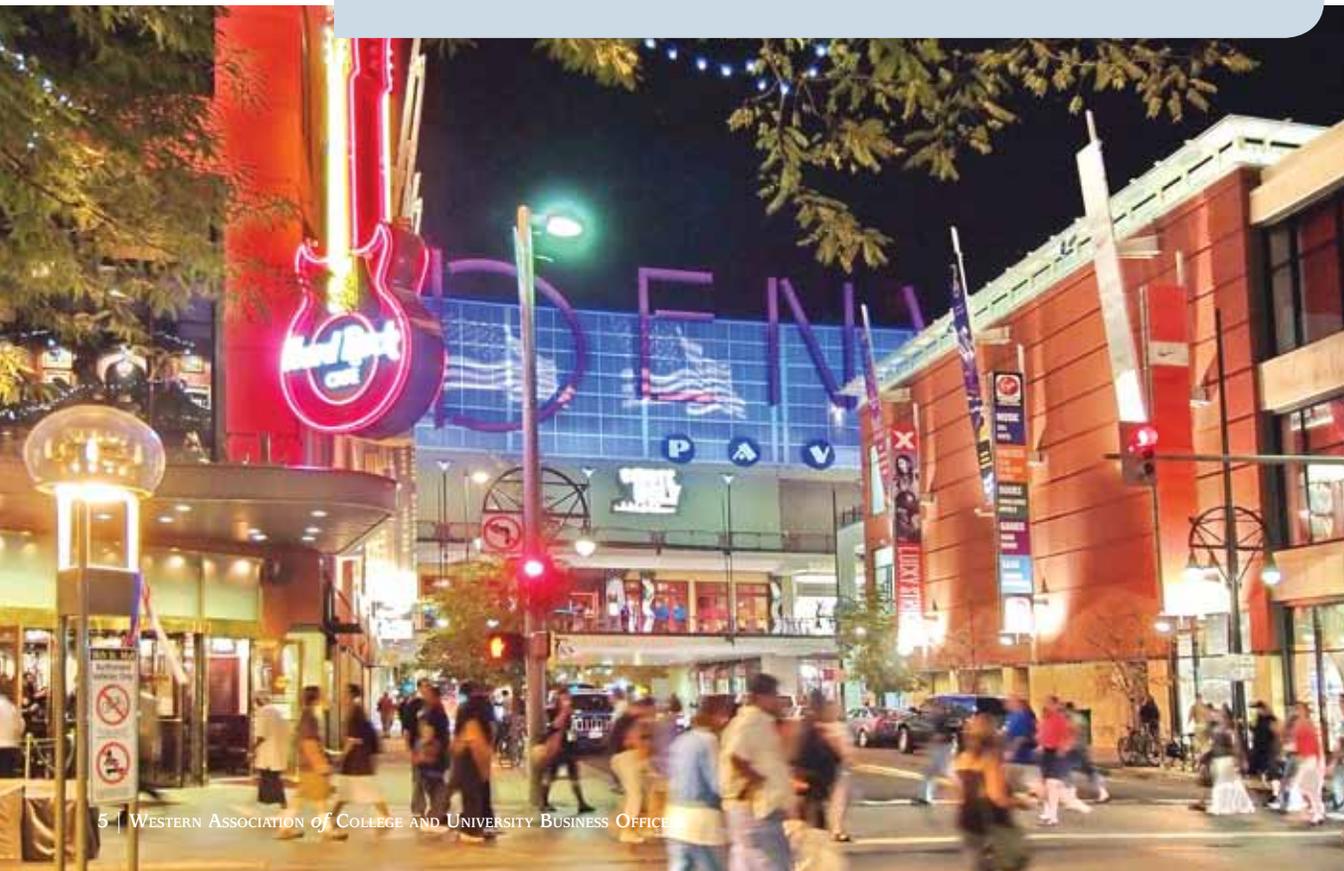


Photo by Steve Crecellius, VISIT DENVER

Events Summary

PRE-CONFERENCE WORKSHOP

Sunday, May 6, 2012 — Building a Great Policy Program

Marriott Denver Tech Center

11:00 a.m. – 2:30 p.m.

Registered Participants: \$18.00 (Includes Lunch and Materials)

Effective policy programs don't just happen. A strong development framework, institutional support, and standardized toolkit are just three of the best practice elements of an effective policy management program. Join us for an interactive workshop that will cover such topics as the various phases of a policy process, examples of exemplary websites, technology issues to consider, elements of a compliance program, and critical success factors. Come prepared to ask questions of our panel members and share your experiences, successes and challenges.

NEW AT THE WACUBO 2012 CONFERENCE: A POLICY TRACK (in Partnership with ACUPA)

Members of the Association of College and University Policy Administrators (ACUPA) will be joining the 2012 WACUBO Conference in Denver to present a new policy track to supplement the other outstanding WACUBO program tracks.

ACUPA members, many of whom have presented policy-focused sessions at national conferences such as CACUBO and NACUBO, join us with a wealth of policy information — from process and structure, to policy best practices, to specific experiences in tackling today's difficult policy issues facing our colleges and universities. You will find the policy track among the list of concurrent sessions and they are open to all WACUBO Conference attendees. For more information on ACUPA, go to: www.acupa.org.

GOLF TOURNAMENT

Sunday May 6, 2012 — The Ridge at Castle Pines North

6:30 a.m. – 1:30 p.m.

Institutional Members: \$140.00

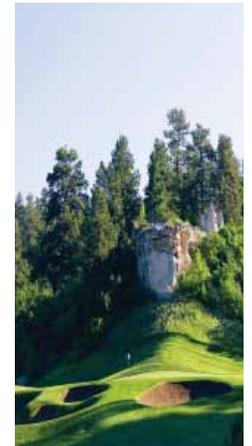
Non-members, Guests and Business Partners: \$175.00

The Ridge Course at Castle Pines North is Colorado's premier upscale public experience. Since its opening in July 1997, the Tom Weiskopf design has received National and Statewide recognition. The Ridge is a par 71 challenge playing from four sets of tees ranging from 5,000 yards to more than 7,000 yards and is maintained to the highest of standards. But don't just take our word for it:

- #10 'Best Places You Can Play' *GolfWeek*
- #1 'Best Course to Hold a Corporate Event' by *ColoradoBiz Magazine*
- #1 Front Range Course, "Best of Colorado Golf" by *Colorado Avid Golfer*
- #1 "Top 10 Public Course in Colorado" by *Colorado Golf*
- #74 "Top 100 You Can Play" by *Golf Magazine*
- 4 ½ Stars, 'Places You Can Play' by *Golf Digest*
- #9 'America's Best Courses, State by State' by *Golfweek*
- #1 'Best Course To Bring Clients' by *Colorado Avid Golfer*
- #1 'Best Course Over \$100' by *Colorado Avid Golfer*
- #1 'Best Maintained Course' by *Colorado Avid Golfer*

For a virtual visit to the Ridge Course, go to www.playtheridge.com/index.php. We encourage you to make plans to enjoy this incredible golf course just minutes from the conference site in the Denver Tech Center.

For more information, contact Tournament Coordinator Brian Burnett bburnett@uccs.edu.



Photos by The Ridge at Castle Pines North

Events Summary Continued

OPENING RECEPTION AND KICK-OFF EVENT

Sunday, May 6, 2012

6:00 p.m. – 10:30 p.m.

Sponsored by: Follett Higher Education Group

Join us for the kick-off to the 2012 annual conference at the History Colorado Center. The museum offers an opportunity to learn about Colorado, from its diverse geography to its people. This recently opened museum features exciting exhibits that blend rich Colorado history with technology, and artifacts. Be among the first to participate in celebrating Colorado's glorious landscapes on a three story multi-media presentation. Learn about the history from an 80 foot map of the state using a "time machine." Virtually travel the plains in a Ford Model-T. Don a headlamp and descend into the hard-rock mine of Silverton. Soar off the world's first ski jump in Steamboat Springs. The evening will feature menus that are inspired from Colorado and the southwestern cuisine. In addition to the exhibits that are available for viewing, the evening will include a variety of live entertainment including a jazz quartet, and an A Capella group, as well as stories about Colorado from renowned Colorado historians.



Photo by Dave Falconer, VISIT DENVER

MEMBER APPRECIATION LUNCHEON

Tuesday, May 8, 2012

12:00 p.m. – 1:45 p.m.

Sponsored by: Moss Adams LLP

Time to relax after the busy Tuesday morning general and concurrent sessions! Please join us as we get together to extend an enthusiastic thank you to WACUBO members, conference attendees, guests and sponsors with some food and entertainment, featuring Corey Ciochetti. This lunch is our opportunity to thank each of you for your continuing support and participation in WACUBO.



Photo by Steve Crecelius, VISIT DENVER

ANNUAL RECEPTION

Tuesday, May 8, 2012

6:30 p.m. – 7:30 p.m.

Sponsored by: George K. Baum and Company

What is better than meeting your colleagues and friends after another full day of sessions, to mix, mingle and enjoy light refreshments and drinks at the Annual Reception? It's the perfect precursor to the Annual Banquet and Dance.

ANNUAL BANQUET

Tuesday, May 8, 2012

7:30 p.m. – 10:30 p.m.

Sponsored by: Bank of America

Okay, there is one final morning of sessions to go, but this is really a can't-miss event — 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 Colorado and the best of Colorado cuisine. Following dinner, we'll kick it up a notch and highlight the sounds of The Nacho Men. The dance floor is now open!



Tuesday – May 8, 2012

9:00-10:15 a.m. KEYNOTE I
Changes in Higher Education

*Freeman Hrabowski, President
University of Maryland Baltimore County*

Freeman Hrabowski has served as President of University of Maryland-Baltimore County since May, 1992. Long recognized as a national leader in higher education, Dr. Hrabowski was recently awarded the 2011 Carnegie Corporation Centennial Academic Leadership Award, which recognizes individuals who have demonstrated outstanding leadership and a commitment to excellence and equity in education. He was also recently chosen to meet with President Obama on the future of higher education in the United States. In addition to his success as an academic leader, he is an active researcher with focus on the participation and performance of African-Americans in science and math. In his remarks, Dr. Hrabowski will share his thoughts on higher education and the necessary changes we need to consider to ensure that access to our institutions remains an achievable target for all qualified students irrespective of their socio-economic background.



Wednesday – May 9, 2012

10:15-11:30 a.m. KEYNOTE II
The Need for Bold Educational and Political Leadership during the Current Unsettled Economic Times

*Honorable Bill Richardson, Former Governor of New Mexico,
former US Secretary of Energy*

Although the U.S. economy is starting to rebound after three years of severe cuts to public services, the recovery is expected to be slow and uneven. Therefore, at least for the near future, government is unlikely to make the investment in higher education that is desperately needed. Former New Mexico Governor Bill Richardson, who successfully invested in public schools and increased access to higher education during his eight years in office, will speak about the need for bold educational and political leadership during these uncertain times.



Photo by Rich Grant, VISIT DENVER

WACUBO 2012 General Session Speakers



Monday – May 7, 2012

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

Brigadier General Dana Born, Dean of Faculty, US Air Force Academy

An Overview of the US Air Force Academy and Current Academic Initiatives

Brigadier General Dana H. Born is Dean of the Faculty, U.S. Air Force Academy, Colorado Springs, CO. She commands the 700-member Dean of the Faculty mission element and oversees the annual design and instruction of more than 500 undergraduate courses for 4,000 cadets in 32 academic disciplines. She also directs the operation of five support staff agencies and faculty resources involving more than \$350 million. Brig. Gen. Born will provide an overview of the United States Air Force Academy, the academic program, and ongoing initiatives to take the institution to the next level of excellence—Aim High...and then Aim Higher. Brig. General Born is a graduate of the Academy and holds a PhD. from Penn State University.



Monday – May 7, 2012

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

Todd Buchholz, Economist, Managing Director Tiger Hedge Fund

Is the Economy Headed Higher—or Off a Cliff

The go-go days of the 1990s turned into the go-backwards days of the 2000's. What's next? How will China's explosive growth shake up business? Will commodity inflation unhinge the economy again? How will Fed Chair Ben Bernanke and Treasury Secretary Geithner keep the economy recovering? Todd Buchholz, who led the White House Energy Strategy will help you figure out whether OPEC will tighten the energy noose again. Learn how the "scissors economy" opens up new business and investment opportunities.



Tuesday – May 8, 2012

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

Anthony Cortese, President, Second Nature

The Need for Sustainability as a Goal in Higher Educational Policies

Dr. Cortese will discuss why and how higher education must make economic, social and ecological sustainability a core goal in education, research, operations and community collaboration. He will discuss how utilizing this framework can increase student career preparedness and the accessibility and affordability of higher education, as well as enhance higher education's role as a cradle of innovation through research, experimentation, and role-modeling solutions in operations and collaboration with local and regional communities. He will highlight some of the best examples of innovation in higher education as well as new opportunities for cost savings and funding. He will have a special focus on the emerging role of business officers in helping to lead this innovation with the president, trustees, chief academic officers and students.



Wednesday – May 9, 2012

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

Paula Mulford, Independent Consultant

What Makes a Person Credible?

Management Consultant Paula Mulford will lead a general session on credibility and what makes a person credible. Through this session you will gain an understanding of the "personal bank account" concept around credibility and the factors that determine credibility including Composure, Character, Competence, Courage and Care for People.

Wacubo 2012 Annual Meeting Schedule of Events

Saturday, May 5

- 8 a.m. – 12 p.m. Wacubo Board Meeting
1 p.m. – 5 p.m. Registration

Sunday, May 6

- 6:30 a.m. – 1:30 p.m. Golf Tournament, The Ridge at Castle Pines North
8 a.m. – 5 p.m. Registration
11 a.m. – 2:30 p.m. Pre-Conference Workshop
“Building a Great Policy Program”
Registered Participants: \$18.00
(Includes lunch and materials)
Effective policy programs don’t just happen. A strong development framework, institutional support, and standardized toolkit are just three of the best practice elements of a policy management program. Join us for an interactive workshop that will cover such topics as phases of a policy process, websites, technology, elements of a compliance program, and critical success factors. Come prepared to ask questions of our panel members and share your experiences/challenges.
2 p.m. – 4 p.m. Information Exchange Program Opening Event
2:30 p.m. – 3:30 p.m. Information Exchange/Ice Cream Social
5 p.m. – 6 p.m. Newcomers Reception
Sponsored by: TIAA-CREF
6 p.m. – 10 p.m. Opening Reception & Dinner at The History Colorado Center
Sponsored by: Follett Higher Education Group

Monday, May 7

- 7 a.m. – 4:30 p.m. Registration
7 a.m. – 8:15 a.m. Information Exchange Breakfast
Sponsored by: Commonfund
8:15 a.m. – 8:30 am Welcome Address
8:30 a.m. – 9:45 am General Session I
An Overview of the US Air Force Academy and Current Academic Initiatives
Brigadier General Dana Born, Dean of Faculty, US Air Force Academy
Brigadier General Dana H. Born is Dean of the Faculty, U.S. Air Force Academy, Colorado Springs, CO. She commands the 700-member Dean of the Faculty mission element and oversees the annual design and instruction of more than 500 undergraduate courses for 4,000 cadets in 32 academic disciplines. She also directs the operation of five support staff agencies and faculty resources involving more than \$350 million. Brig. Gen. Born will provide an overview of the United States Air Force Academy, the academic program, and ongoing initiatives to take the institution to the next level of excellence—Aim High...and then Aim Higher. Brig. General Born is a graduate of the Academy and holds a PhD. from Penn State University.
9:45 a.m. – 10:45 a.m. Information Exchange Refreshment Break
Sponsored by: Chartwells Higher Education
10:45 a.m. – 12 p.m. Concurrent Session 1
RE-ENGAGE! How America’s Best Places to Work Inspire Extra Effort in Extraordinary Times.
Leigh Braham, Keeping the People

Leigh Branham is co-author of a recent book, “Re-Engage! How America’s Best Places to Work Inspire Extra Effort in Extraordinary Times” In his presentation, Leigh will discuss several highly engaged and successful workplaces, and how such outstanding organizations have used what he calls six universal engagement drivers to create productive workplace cultures. He offers employers specific approaches for using the

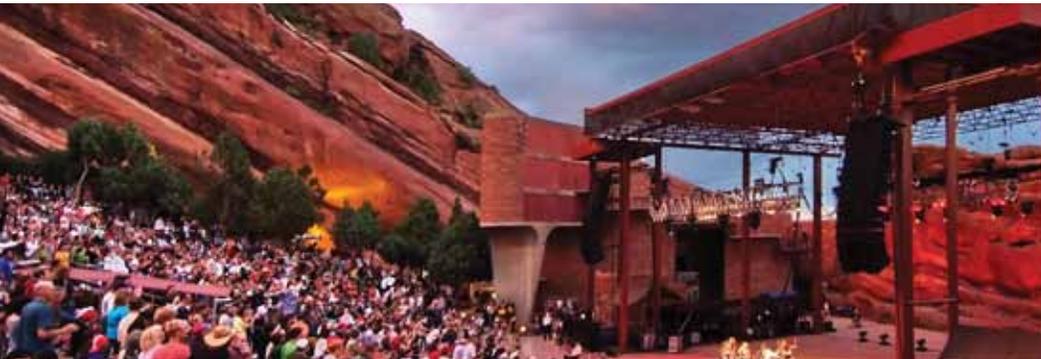


Photo by Dave Falconer, VISIT DENVER

engagement drivers, which he describes as “inspiring leadership, effective supervision, strong teamwork, job enrichment/professional growth, valuing employee contributions, and nurturing employee well-being.” In addition, he describes three “crosswind” factors that can throw employee engagement initiatives off course: company size, generational diversity, and the economic downturn. His insights are based on the analysis of 2.1 million engagement survey results from more than 10,000 employers.

Concurrent Session 2

Issues Facing Higher Education

David Longanecker, President, WICHE

Dennis Jones, President, NCHEMS

Paul Jenny (Moderator) Vice Provost, Office of Planning and Budgeting, University of Washington

WICHE and NCHEMS are two leading organizations providing analysis of opportunities and risks for higher educational institutions. Leaders from these organizations will provide insight on the rapidly changing environment of higher education and what opportunities and potential risks are in front of us.

Concurrent Session 3

Creating a Sustainable Academic Business Plan: From Central Administration to the Academic Unit

Ruth Johnston, Associate Vice President, Finance and Facilities, University of Washington

The session will address the importance of creating and implementing a sustainable academic plan in a climate of reduced funding, and discusses how the University of Washington School of Nursing has approached this task in the midst of cultural, political and financial challenges. Also included will be a description of the organizational development methods used, including an assessment ladder, activity scopes, and Lean tools.

Concurrent Session 4 — Tales from the Front **How the Oregon University System is Attacking Deferred Maintenance**

James Kadamus, Vice President, Sightlines LLC

Bob Simonton, Assistant Vice Chancellor for Capital Programs, Oregon University System

Monica Rimai, Vice President, Finance and Administration, Portland State University

Robin Pierce, Director of Facilities Planning, Portland State University

Participants will learn how the Oregon University System (OUS) made a successful case for a 500 percent capital budget increase from 2001-03 to 2009-11 to address deferred maintenance. Representatives from OUS, Portland State University (PSU) and Sightlines will discuss how they used performance measurement and analysis, developed a political strategy for securing resources, and created a plan for rapidly implementing capital projects at the campus level. Additionally, Portland State University (PSU), with a densely populated urban campus, one of the oldest space profiles in the system, and the largest backlog of deferred projects, will present a case study to demonstrate the major impact of the new funding. PSU will discuss their strategic selection of renovation projects, which benefitted academic programs as well as improved the overall condition and appearance of the campus.

Concurrent Session 5 (ACUPA track)

Policies as “Stone Tablets” or “Wikis”— Finding the Right Balance through Shared Governance

Cara O’Sullivan, Utah Valley University

Policy development processes can range from stone tablets that are hard to change and directed from the top to wikis with too many contributors and no change control. A more effective approach lies somewhere in the middle: a shared governance policy development model with established roles and input cycles that provide a chance for members of an

Wacubo 2012 Annual Meeting Schedule of Events

Monday, May 7

institution's community—students, staff, faculty, and administration—to provide feedback and perspective in the institutional policy process. Utah Valley University has established a policy development cycle that actively engages the campus community members. This presentation will share the successes and challenges of its effort and the benefits of the shared governance model.

12 p.m. – 1:15 p.m.

Lunch

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 education institutions.

1:15 p.m. – 2 p.m.

Information Exchange — Dessert

2 p.m. – 3:15 p.m.

Concurrent Session 6

Building Bridges: The Link Between Strategic Planning & Budgeting

Stacy Pearson, Boise State University
Sona Andrews, Oregon Health Sciences

In this session, Boise State University staff will discuss their successful use of the strategic plan as the primary driver of the budget planning process. The effectiveness of creating a strong link between the strategic plan and budget requires unwavering commitment from the institution's leadership. Processes must be defined, and faculty and staff must be engaged to ensure the most effective use of resources. In this session you will learn how campus leadership at Boise State involved all campus units in this process, and discuss key strategies to ensure successful coordination and communication of both the process and the results at your institution. You will review tools and materials that will allow you to share information relevant to creating a strategic plan-budget process bridge on your own campus.

Concurrent Session 7

HR and Diversity Issues

Andy Brantley, President and CEO, CUPA-HR
Linda Lulli, Associate Vice President, for Human Resources, Bryant University

CUPA-HR has long been the leading voice regarding higher education workforce issues. Andy Brantley, President and CEO will discuss the necessity of achieving a more diverse and inclusive workforce and approaches to accomplishing this crucial higher education goal.

Concurrent Session 8

Capacity Building and Change Management in Higher Education

Donna Buchanan, USC
Duane Hickling, Principal, Hickling and Associates

USC Facilities Management Services, in partnership with Hickling & Associates, methodically engaged their campus stakeholders in a successful, comprehensive change management process and in the process expanded the organizational capacity for performance excellence. The focus of this workshop will be on the methods and processes utilized to drive and sustain a major operations process reengineering initiative in the middle of other major simultaneous organizational change efforts.

Concurrent Session 9 — Tales from the Front
How to be Financially Sustainable When Revenues Decline

Ron Lau, Board of Regents, Southern California University of Health Sciences

For 30 years Charles R. Drew University operated with very thin resources, but, in 1998, the Board and new President resolved to develop a culture of fiscal responsibility and achieve a fiscal turnaround by 2007. The resolve quickly unraveled with a leadership transition in 2006 and the resignation of the entire Board of Trustees as new and significant financial problems emerged. Although there are still big questions about debt service and future bond payments, CDU is once

Wacubo 2012 Annual Meeting Schedule of Events

Monday, May 7

again stable and was removed from probation in 2011. The new Board is now focused on building financial health into the culture and systems of the University.

Concurrent Session 10 (ACUPA track)

Communicating Policy: Once the approval is done, how do we best disseminate the information to ensure awareness and compliance?

Gary Taylor, King Abdullah University of Science and Technology

Just having a comprehensive repository of policies does not achieve the outcomes the University really wants, namely “doing what we say”. Policy offices need to facilitate effective and targeted “push” and “pull” communication in support of sound policy development processes. Some of the supportive tools include:

- A user-friendly website with search facilities for those actively seeking access.
- A notice of new or amended policies, drawing attention to new requirements.
- Briefing sessions for stakeholders.
- Training workshops/online videos for users.
- FAQs and/or Helpdesks to facilitate implementation.
- Involvement of organized labor or staff representatives.
- Targeted email briefings for power-users, centers-of-influence and other stakeholders.

3:30 p.m. – 4:45 p.m.

General Session II

Is the Economy Headed Higher — or Off a Cliff

*Todd Buchholz, Economist, Managing Director
Tiger Hedge Fund*

The go-go days of the 1990s turned into the go-backwards days of the 2000s. What’s next? How will China’s explosive growth shake up business? Will commodity inflation unhinge the economy again? How will Fed Chair Ben Bernanke and Treasury Secretary Geithner keep the economy recovering? Todd Buchholz, who led the White House Energy Strategy will help you figure out whether OPEC will tighten the energy noose again. Learn how the “scissors economy” opens up new business and investment opportunities.

4:45 p.m. – 5:45 p.m.

Information Exchange — Wine & Cheese Reception

Sponsored By: Fidelity

5:45 p.m. – 8:30 p.m.

Dinner On Your Own

8:30 p.m. – 11 p.m.

Follett’s Sweets In The Suite

Sponsored by: Follett Higher Education Group



Food photos by Steve Crecelius, VISIT DENVER



Photo by Rich Grant, VISIT DENVER

Wacubo 2012 Annual Meeting Schedule of Events

Tuesday, May 8

8 a.m. – 4 p.m.

Registration

8 a.m. – 9 a.m.

General Membership Breakfast

ACUPA Business Meeting and Breakfast

Sponsored By: Keybank

9 a.m. – 10:15 a.m.

Keynote 1

Changes in Higher Education

Freeman Hrabowski, President, University of Maryland Baltimore County

Freeman Hrabowski has served as President of University of Maryland–Baltimore County since May, 1992. Long recognized as a national leader in higher education, Dr. Hrabowski was recently awarded the 2011 Carnegie Corporation Centennial Academic Leadership Award, which recognizes individuals who have demonstrated outstanding leadership and a commitment to excellence and equity in education. He was also recently chosen to meet with President Obama on the future of higher education in the United States. In addition to his success as an academic leader, he is an active researcher with focus on the participation and performance of African-Americans in science and math. In his remarks, Dr. Hrabowski will share his thoughts on higher education and the necessary changes we need to consider to ensure that access to our institutions remains an achievable target for all qualified students irrespective of their socio-economic background.

10:15 a.m. – 11 a.m.

Information Exchange Break

11 a.m. – 12 p.m.

Concurrent Session 11

Accounting Update

Kim Kvaal, Associate Vice President, Accounting & Business Services, University of San Francisco
Mary Fischer, Professor of Accounting, UT Tyler

Mary Fischer from UT Tyler and Kim Kvaal from the University of San Francisco will provide an update to GAAP and impact on our colleges and university accounting practices and reporting.

Concurrent Session 12

Sustainability Roundtable

Tony Cortese, President, Second Nature

Morgan Olsen, Executive Vice President, Treasurer and CFO, Arizona State University

Sherri Tonn, Vice President for Finance and Operations, Pacific Lutheran University

Mary Spilde, President, Lane Community College

“Catch up on the latest in higher education related sustainability issues. Despite the dominance of the budget crisis for most of our campuses, issues related to the President’s Climate Commitment, greenhouse gas emission requirements, and simply going greener are still of concern. Join Tony Cortese from Second Nature as he moderates a panel of recognized sustainability leaders: Morgan Olsen, Arizona State University; Sherri Tonn, Pacific Lutheran University; and Mary Spilde from Lane Community College — who will share their stories, successes and challenges and address questions from the audience.

Concurrent Session 13

Introduction of Activity Based Budgeting at the University of Washington

Paul Jenny, Vice Provost, University of Washington
Dave Maddox, Principal, RPM Consulting

The University of Washington recently successfully implemented an Activity Based Budgeting Model. This major budgetary reform was launched during a period of historical reductions in state funding (a 50% decline in three years), and this session will focus on how budgetary reductions and stress both complicated and helped facilitate this change.

Concurrent Session 14 — Tales from the Front Human Resources on the Front Line Reexamining (Almost Everything)

E. Jill Pollock, Vice President for Employee and Information Services, University of Colorado System
Stephen Murphy, Health Management Design Consultant, Aon Hewitt

Employee-related costs are the predominant line items in the operating budgets of almost all universities, yet are often not the first target for reductions or deep analysis. In this session, staff from the University of Colorado will discuss how the depth of the economic

crisis starting in 2008 required a full reassessment of these costs and necessitated nontraditional budget reduction methods, including: analysis of employee benefits competitiveness, eligibility and accounting; employee and student health plan structures and costs; employee-related business process improvements; faculty retirement strategies; and, legislative flexibility.

Concurrent Session 15: (ACUPA Track)

Faculty, the Final Frontier (Engaging a Challenging Audience.)

Michele Gross, University of Minnesota

Target audiences for policies vary greatly. End users may be individuals whose work regularly requires use of policies, or individuals such as faculty who generally do not focus on policies except where they are personally impacted (e.g., travel). This presentation will talk about engagement during policy development and policy communication strategies used at the University of Minnesota for faculty.

12 p.m. – 1:45 p.m. **Member Appreciation Luncheon — featuring Professor Corey Ciocchetti**
Sponsored By: Moss Adams, LLP

1:45 p.m. – 2:45 p.m. **Concurrent Session 16**

Working with Faculty

Susan Christy, Principal, Christy Consulting

This session will focus on facilitating effective staff-faculty relationships. Whether a business officer, manager or staff, viewing academia through staff-faculty relationships brings new insights and approaches. Participants will discover principles and strategies for effective staff-faculty relationships, identify the impact of academic structure and culture on staff-faculty relationships, learn about faculty work styles, priorities and stresses, and how to appreciate the business officers' role and challenges in working with faculty.

Concurrent Session 17

Being a Transformational Leader in Higher Education

Jerry Echeverria, Executive Vice Chancellor and Chief Academic Officer (retired), California State University

This session will address what it takes to become a

leader as your natural self expression. Rather than trying to learn aspects and traits of an effective leader as presented in popular media, this session addresses how you can be an effective leader in higher education with the skills you already have. Participants will discuss this approach for working with, mentoring, guiding, and leading administrators and staff on your campus. Being an effective leader, and being willing to transform how you see yourself, just might lead you to a transformed work life as well.

Concurrent Session 18

UC Bay Area — How Two Campuses are Consolidating and Collaborating on Procurement

Jim Hine, Assistant Vice Chancellor and Chief Procurement Officer, UC San Francisco

Ron Coley, Associate Vice Chancellor, Business and Administrative Services, UC Berkeley

Jim Hine and Ron Coley will speak about the formation of the UCSF and UC Berkeley Procurement Center of Excellence. Driven by financial necessity, the two campuses are pooling their spend, resources and programs to drive spend cost savings and increase procurement effectiveness. The presenters will provide an overview of the collaboration program including external spend savings, organizational consolidation, and synchronized technologies. He will profile some of the traditional as well as the more non traditional savings opportunities that the collaboration enables. Mr. Hine and Dr. Coley will also speak to how the UC Bay Area is working in concert with the rest of the eight UC campuses to drive even more savings.

Concurrent Session 19 — Tales from the Front **Identifying, Planning, and Implementing the 4th Revenue Stream**

Jacalyn Askin, Vice President, Administrative Services, Chandler-Gilbert Community College

As resources have become increasingly limited, higher education institutions are turning to the development of the "4th revenue stream." However, we have found that the skill set required for management of our traditional revenue streams, state or local tax funding and/or

Wacubo 2012 Annual Meeting Schedule of Events

Tuesday, May 8

tuition, is not necessarily well suited for identifying, planning for and implementing alternative revenue sources. Thus, it has become important to identify the skills required for this task and to educate our institutions about the steps involved in developing a business plan that may serve as the basis for a grant application, a donation “ask,” or the development of a new program or a partnership with outside organizations. We will discuss our creation of a short workshop to address this problem — move us in that direction: “Identifying, Planning and Implementing the 4th Revenue Stream.”

Concurrent Session 20: (ACUPA Track)

Emerging Policy Issues of 2012 (and Beyond?)

Dan Montez, University of Colorado System

A panel discussion (and audience interaction) regarding the top 5-10 emerging policy issues facing colleges and universities in 2012 and beyond, as identified through a review of questions submitted to the ACUPA list serve and a member survey in early 2012. A panel of policy professionals will discuss these issues and give their perspectives on how their institutions will be dealing with those issues. Examples would be similar to current emerging issues relating to social media and electronic cigarettes.

2:45 p.m. – 3:30 p.m. Information Exchange Break

3:30 p.m. – 4:45 p.m.

General Session III

The Need for Sustainability as a Goal in Higher Education Policies

Anthony Cortese, President, Second Nature

Dr. Cortese will discuss why and how higher education must make economic, social and ecological sustainability a core goal in education, research, operations and community collaboration. He will discuss how utilizing this framework can increase student career preparedness and the accessibility and affordability of higher education, as well as enhance higher education’s role as a cradle of innovation through research, experimentation, and role-modeling solutions in operations and collaboration with local and regional communities. He will highlight some of the best examples of innovation in higher education as well as new opportunities for cost savings and funding. He will have a special focus on the emerging role of business officers in helping to lead this innovation with the president, trustees, chief academic officers and students.

6:30 p.m. – 7:30 p.m.

Annual Reception

Sponsored by: George K. Baum & Co.

7:30 p.m. – 10:30 p.m.

Annual Banquet & Dance

with the music of the Nacho Men

Sponsored by: Bank of America



Photo by Rich Grant, VISIT DENVER



Wacubo 2012 Annual Meeting Schedule of Events

Wednesday, May 9

7:30 a.m. – 8:15 a.m. Board of Directors Meeting

7:45 a.m. – 8:30 a.m. Buffet Breakfast

8:30 a.m. – 10 a.m. General Session IV

What Makes a Person Credible?

Paula Mulford, Independent Consultant

Management consultant Paula Mulford will lead a General Session on Credibility and What Makes a Person Credible. Through this session you will gain an understanding of the “Personal Bank Account” concept around credibility and the factors that determine credibility including composure, character, competence, courage and care for people.

10:15 a.m. – 11:30 a.m. Keynote II

The Need for Bold Educational and Political Leadership During the Current Unsettled Economic Times

Honorable Bill Richardson, Former Governor of New Mexico, Former US Secretary of Energy

Although the U.S. economy is starting to rebound after three years of severe cuts to public services, the recovery is expected to be slow and uneven. Therefore, at least for the near future, government is unlikely to make the investment in higher education that is desperately needed. Former New Mexico Governor Bill Richardson, who successfully invested in public schools and increased access to higher education during his eight years in office, will speak about the need for bold educational and political leadership during these uncertain times.

11:30 a.m. – 12 p.m. Closing Remarks/Drawings

Conference Information

HOTEL RESERVATIONS

WACUBO's 74th Annual Meeting is located at:
Marriott Denver Tech Center
4900 S. Syracuse Street, Denver Colorado 80237
Reservations Contact:
Phone: (800) 228-9290
www.marriott.com/hotels/travel/dentc-denver-marriott-tech-center

Experience the Marriott Denver Tech Center Hotel, offering unrivaled meeting space, business friendly amenities and outstanding service. The hotel is located near mass transit, local dining, and shopping at the Cherry Creek and Park Meadows Malls. The hotel offers spacious guestrooms with wired/wireless high-speed Internet access and a full-size work desk. On-site amenities include an indoor and outdoor pool and fully equipped fitness center.

Please make reservations directly with the Marriott DTC hotel by calling 1-800-228-9290 or using the web link provided above. WACUBO's single/double rate is \$143 plus tax. This rate includes complimentary internet and parking.

Please identify yourself as a member of WACUBO when you are making the reservations. The conference runs May 6-9, 2012. This rate is good for the period May 4, 2012 through check-out on May 12, 2012 to allow members to extend their trip in Denver and the surrounding area.

DIRECTIONS FROM AIRPORT

Directions From Denver International Airport (distance = 24 miles)

- Exit the Airport to I-70 west.
- Take I-70 west to I-225 south.
- Proceed on I-225 south to the Yosemite exit.
- Turn Left on Yosemite going (east) to Union.
- Turn right on Union to S. Syracuse.
- Turn left on S. Syracuse and the Hotel is on the right hand side.

Google Directions and Map: Denver International Airport 8500 Peña Boulevard Denver, Colorado

TRANSPORTATION

Super Shuttle \$22.00 USD (one way)

- How to Get to Super Shuttle When You Land:
 - Take the train from the Concourse to the Terminal.
 - Pick up your luggage and proceed to the Super Shuttle counter located on Level 5/Baggage Claim, adjacent to the water feature in the center of the terminal.
 - Counter staff will issue tickets and give directions to the van loading areas.
- For information, call 1-800-BLUEVAN.
- Ticket counters are closed between 12 a.m. and 6 a.m. If you arrive between these hours, please use the courtesy phone located at the ticket counter to notify dispatch of your arrival.
- NOTE: This is a shared van service and it's possible you may go to various other hotels or stops in the downtown area, etc. before getting to the Marriott DTC.

Taxis from DIA and Denver Tech Center

- Taxis pick-up and drop-off from Jeppesen Terminal Level 5, Island 1, outside doors 507-511 (east side) and 506-510 (west side).
 - Flat rate charges from DIA to the Denver Tech Center are \$65.00.
- Options:
 - Denver Yellow Cab (303) 777-7777 www.denveryellowcab.com
 - Freedom Cab (303) 444-4444 www.freedomcabs.com
 - Metro Taxi (303) 333-3333 www.metrotaxidenver.com
 - Union Taxi Cooperative (303) 922-2222 www.uniontaxidenver.net

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.

Registration

Early Bird Registration: March 15, 2012 is the deadline for WACUBO Institutional members to qualify for the discounted rate. **The “Bill-Me, Invoice option” is no longer available. Full payment must be submitted at the time of registration.**

Online Registrations: Again this year, WACUBO will be offering an online registration process available through our web page at www.wacubo.org. 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 (Oliver) Putnam, Associate Vice President, University of San Diego, 5998 Alcalá Park, San Diego, CA 92110, 619-260-7430 (phone), 619-260-4606 (fax), poliver@san Diego.edu (email). **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 e-mail dean.calvo@cgu.edu.

Refunds: Request for refunds will be honored if received by April 2, 2012, by written notification to the address or fax number listed above for Patricia (Oliver) Putnam or by email to poliver@san Diego.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

Thank you for your interest
and support of WACUBO!



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University Lease
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Wedbush Securities, Inc.
Wells Fargo Bank

Please note: Participating exhibitors subject to change prior to February 29, 2012



Photo by Stan Oberst, VISIT DENVER



Photo by Stan Obert, VISIT DENVER

Upcoming Events



The 55th WACUBO Business Management Institute at Santa Barbara is from August 5-9, 2012. Start planning now to attend this year and experience a week of intensive professional development on important topics presented by nationally known faculty in a lovely beachside

setting at the University of California, Santa Barbara. The Institute is perfect for higher education managers, supervisors, academic officers, staff and other mid-level personnel who perform administrative and business functions. Anyone new to higher education will benefit from curriculum and networking opportunities. 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 and meet new colleagues. Senior-level administrative officers and Institute graduates may attend the Continuous Learning program and take courses from the Institute curriculum or return to hear favorite faculty. Evening special events provide fun, relaxation and a chance to get to know your colleagues. More information will be available in February 2012.

The Executive Leadership Management Institute

The Institute will be at the University of Southern California from July 22-26, 2012. The ELMI's mission is to offer participants a

premier experience designed to develop and enhance the skills essential for success in higher education administration through an intensive, "total immersion" experience, with numbers limited to ensure personal attention. Lasting seven days, the experience permits participants and faculty to get to know each other well and to have in-depth discussion of issues, with time to explore and reflect. The ELMI's long-standing curriculum deals with the "building block" skills of successful leaders: understanding the different "cultures" on campus; effectively handling conflict; dealing with academic politics and meeting management; improving the decision making process; thinking and acting strategically; communicating complicated information well; and persuading others. For further information on the 2012 ELMI, please contact: the Office of the Institute Director in Pasadena, California at (626) 449-4356.