



# PACRAONews

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*President's Message to the Membership*

## The Power of Vision

OPTIMISM HAS NEVER SEEMED SO CRITICAL as it seems today. I don't have to recite the anhedonic litanies of budget and commercial ills that consistently make our daily newspapers. You are only too familiar with the context from which our professional dialogues arise and in which our vital operations struggle. So, let me instead provide some hope and attest to the spirit of optimism that nevertheless endures among our number.

PACRAO is acutely aware of the situations faced by our members and by our member institutions. At the beginning of this year, your Executive Board committed itself to doing what we could as an Association to offer leadership and support. Defining our vision, we identified three primary values, our essential reasons for being: professional development, professional networking or relationship-building, and professional recognition.

With these values in mind, we set about our labors for 2003 and have already seen the yield from some of our efforts.

In mid-March, Frost Johnson, Vice President for Publications & Information Technology, unveiled our **PACRAO website** ([pacrao.org](http://pacrao.org)). Although still under construction, members now have a virtual home for information and news about our PACRAO family. Very soon, the membership database will be rolled out so you will have a virtual—and updated—PACRAO directory. In the future, I hope to see some of our other strategies and initiatives represented on that website.

One of these strategies is our **professional development workshops**. Realizing that so many of you are under tight budget constraints, Faith Weese, our Vice President for Professional Development, has worked creatively and elegantly to offer not only more workshops than we have ever offered in the past, but to offer them, whenever possible, free of charge. Through some important partnerships, Faith has courageously identified and vigorously modeled the kind of interdependent collaboration that is necessary for all of us to succeed in these taxing times. And what could be more valuable right now than free FERPA workshops?

Under Nirmala (“M a l a”) Sharma, Diversity Development Advocate, the PACRAO Diversity Development Committee extended its own brand of **outreach** by moving out of the big city (Los Angeles) to offer



a pair of workshops where we seldom address the professional development need. Working with colleague Cecilia Rodriguez, Registrar at the University of the Pacific, two FERPA workshops were offered on the same day in Stockton, California.

Talking about outreach, Fred Dear, our Vice President for Membership, has been busy, working with Frost and Tina Toma, Treasurer, to redefine the mechanics of our **member services** in the electronic context. While we know many of you will think long and critically about the memberships you maintain this year, we want to make sure your PACRAO membership remains not only relevant, but vital and indispensable.

President-Elect Bob Bontrager has been working with Richard Backes, PACRAO 2003 Exhibits Chair, to enhance our **vendor relations**. This year, following AACRAO's lead, PACRAO adopted guidelines for the participation of vendors in our annual meeting. The guidelines were structured to preserve the professional development intent of our annual meeting, a contingency on which our non-profit status depends, and to create greater opportunities for exhibitors. Our hope is to identify and promote win/win relationships with our vendors, moving away from the strictly commercial to something more akin to professional partnerships.

Now, I know we say this for every annual meeting, but **PACRAO 2003** promises to be the best conference ever! Rocky Owens and Kirk Koenig, our Local Arrangements Committee Co-Chairs, and their very energetic and creative com-

PACRAO 2003  
Coeur d'Alene,  
Idaho  
November 2-5

# Professional Development Committee

## Supporting Staff Through Reorganization

By Gaylea Wong

When I volunteered through our writer's group to write an article for this newsletter, I suggested the topic of supporting staff through change – in particular through a major restructuring of the organization. I know that like my own school, many PACRAO members have had the pleasure of this experience in recent years. Some, like us, perhaps more than once. UBC's most recent reorganization saw Student Services split off from a combined Student Development and Enrolment Services model into two distinct units - Enrolment Services and Student Development and Services. What can I say – this is where we started - what goes around, comes around!!

I was part of a 7-person transition team that came together to support the Vice-President for Students and the Acting Registrar, as well as to provide support to the overall organization during this time of change. We were assisted on logistics by a consultant from Vancouver's Edge Training & Consulting Ltd. The full staffing complement for the entire portfolio was 200 plus employees working in Enrolment Service departments and Student Service and Development units. Some units also provided support to both sides of the house and actually still do. Our support team was called the Transition Needs Assessment Team (TNAT) and our mandate was to.....

***Provide advice to the project sponsors regarding support and communication mechanisms to effect the change and support staff; and contract with sponsors to deliver specific items to support the change process.***

The particular part that I would like to focus on is the communications aspect of the transition process - a key area of any change process, large or small. It is the one area that is often missed or at least not given the attention it requires for the initiative to be successful. My designated role was the communications point person on the team. The following article outlines some of the components of the communications plan we put together and gives some insight into some of the lessons learned by the team and our organization through this change period. Hopefully, some of the material will be useful to you in your own institutions.

Regarding the team process and matters of communication, the team was to:

- ◆ Develop a global communication strategy
- ◆ Provide support as required
- ◆ Carry responsibility for messages common to all managers or all staff
- ◆ Develop and track execution of communication plans (identify audiences, objectives, messages and tactics)
- ◆ Obtain appropriate approval of communication plans
- ◆ Design and write specific communications
- ◆ Work closely with the Director of Communications Services for Student Services
- ◆ Support others in fulfilling their communications responsibilities (i.e., designing, writing, presenting)
- ◆ Work with Communications Services on the project intranet site

### Guiding Communications Principles

The following principles were meant to guide all communications decisions -

- ◆ Communicate openly, honestly and generate dialogue
- ◆ Communicate the "right information, to the right people, at the right time"

- ◆ Enable and use managers and other "natural links" as much as possible to deliver messages - they are credible and can provide a day-to-day business context for messages
- ◆ As much as possible, communications should be in person (to facilitate two-way dialogue and understanding of complex information)
- ◆ Ensure that the transition team's messages are aligned with the organizational vision and other change initiatives
- ◆ Follow a systematic plan, whereby communication occurs within a planned process with assigned responsibilities, to ensure all members of all target audiences hear key messages relevant to them in an appropriate manner and timeframe
- ◆ Don't assume 100% comprehension and retention of communicated messages; repetition is necessary for messages to be internalized
- ◆ Use varied channels and communication vehicles
- ◆ Prepare communications to address the audience's needs and concerns; answer the key questions - **what, why, how** and very importantly, **what will it mean to me.**

### Critical Success Factors

The success of the communication effort is ***dependent on committed and consistent involvement and availability from project sponsors, the project team and managers to complete communication activities.*** This is the key to the success of such a communications initiative.

### Stakeholder Analysis

Many stakeholder groups are impacted by the organizational changes taking place. The extent and content of communications to each group is determined by the nature of the impact on these groups. Our detailed communications plans outlined the objectives, key messages and tactics for these communications to each stakeholder group.

### Our key stakeholder groups were -

#### Stakeholder Group

**Key Transition Needs Assessment Team - 7 staff, both clerical and professional**

- ◆ To be kept in the loop re: the future state of the organization (from the sponsors)
- ◆ Ongoing internal information
- ◆ Require feedback from staff on their needs and the most appropriate forms of communication for them

#### Team sponsors - Vice President Students and Acting Registrar

- ◆ Require information regarding project's progress and issues
- ◆ Need to have information required to make key decisions; need perspective of staff to make decisions; need to identify and remove obstacles, identify and mitigate risks.
- ◆ Need to understand concerns of management.
- ◆ Need to deliver key messages

#### Management - (15 Directors)

- ◆ Require information regarding project progress and issues
- ◆ Need to deliver some messages to staff
- ◆ Need to be on side

*Continued On Page 3*

## Professional Development Committee (from page 2)

- ◆ Need information about the changing organization in a timely and supportive manner (i.e., Learning Organizations, POWER for Students).

- ◆ Need to be informed of overall priorities, timelines. and decisions

### All staff (200)

- ◆ Require information regarding changes as they will affect their work place and their jobs
- ◆ Need to be informed of overall priorities and timelines
- ◆ Need to know how they will be impacted
- ◆ Need for 2-way dialogue

### Students (35,000 +)

- ◆ Need to be informed on a need to know basis of any changes that will affect them; i.e., where their service access may change. Should be as seamless as possible.
- ◆ Key concept is that service should be improved by the changes; service should be centered on the student

### University community

- ◆ Require updates on our changing organization as it affects the community

### Outside community

- ◆ Require appropriate updates on our changing organization as necessary

### SIMPL BPR project – Major re-engineering project running in parallel to the reorganization (3 Enrollment Services managers)

- ◆ Requires information that affects the SIMPL project planning activities and how SIMPL outcomes will fit with the new structure

### Bargaining Units

- ◆ Require information that affects working conditions of their members

## Communication Vehicles

A variety of communication vehicles can be used to deliver transition messages. The critical factors in determining which communication vehicle to use for a given communication will depend on assessing both the message and the audience and matching the communication tool to these needs.

The following is an overview of possible communications vehicles. Not all were used during our transition needs assessment phase and are here for your information.

### Face-to-face

#### Presentations

- ◆ standard “lecture style” presentations
- ◆ some interaction (primarily through Q&A’s)
- ◆ large amount of reasonably complex information

### Focus Sessions

- ◆ small group discussions
- ◆ specific topics

### Workshops

- ◆ similar to presentation, but incorporates high degree of participation
- ◆ topics requiring exploration and discussion Brown bag
- ◆ also known as “lunch and learn” sessions
- ◆ can be presentation or workshop style
- ◆ motivated audience (topic they find interesting)

- ◆ personal development and broadening knowledge base (e.g., best practices, recent industry developments, customer research)
- ◆ Q and A - face to face with transition team and sponsors driven by participants
- ◆ two-way communication Demos
- ◆ demos of new technologies
- ◆ information that is difficult to conceptualize (e.g., new technologies) Open houses / “day in the life” presentation
- ◆ simulation of “future” environment
- ◆ opportunity for relatively unstructured and somewhat interactive information about the topic
- ◆ information that is difficult to conceptualize
- ◆ motivated audience
- ◆ audience with varied concerns

### Drop-in Sessions

- ◆ small group discussions around specific topic two-way communication
- ◆ dialogue on topic

### Town hall Meetings

- ◆ Group session with executive sponsors
- ◆ Specific messages and “q and a” with staff

### Printed

#### Newsletter, Papers UBC Reports

- ◆ high level, introductory information (general interest)

Communication packages for managers documents to support managers in delivering project communications to staff geographically dispersed audiences

- ◆ managers comfortable with content

Q&A sheets published as needed for impacted management and staff - usually address one issue (e.g., training) and provide detailed answers to questions about that issue

- ◆ can be delivered through e-mail and/or intranet
- ◆ quickly disseminate information on specific topics to large audience
- ◆ best for facts/logistics type information (vs. conveying complex or impactful messages)

#### Update Bulletins

- ◆ issued on as needed basis
- ◆ provide update on specific topic and/or project activities can be delivered through internet
- ◆ quickly disseminate information on specific topics to large audience
- ◆ best for facts/logistics type information (vs. conveying complex or impactful messages)

### Technology

#### Web (Internet and Intranet)

- ◆ Intranet site providing information on project background, current activities, project timeline, etc.
- ◆ feedback and questions can be submitted through the site
- ◆ encourage linking from other appropriate sites
- ◆ FAQ’s
- ◆ quick reference information
- ◆ background information
- ◆ Chat rooms
- ◆ real time online exchange

## Professional Development Committee (from page 3)

- ◆ information sharing among stakeholders
- ◆ Bulletin boards
- ◆ online exchange
- ◆ allows more time for preparing answers to questions E-mail
- ◆ project updates can be distributed directly to audience members through email
- ◆ highlighting news and information on the project intranet site
- ◆ *Other*

## Branding

- ◆ logo and promotional materials
- ◆ recognition
- ◆ linking together project communications and other project materials

From the generic communications planning document we moved on to prepare and deliver specific communiqués. We did not get it entirely right which is probably not a huge surprise to anyone. Communicating effectively through a large organizational change process is very difficult - but at least we had a fighting chance with our planning template and up-front analysis of what the different stakeholders required. The right message to the right target audience, timed effectively and using the appropriate vehicle all become a very fine and delicate balancing act. Staff basically wants to know what is happening and why, what it means to them in their jobs and for their future and they do want to feel supported by their managers through the entire process.

## Lessons Learned about Communication through the Transition Process

- ◆ Must clearly define the problem statement at the beginning and still allow for flexibility.
- ◆ Have very visibly engaged sponsors – this is really important. All staff and the transition team need to know that their leaders care about employee thoughts and feelings regarding the changing work environment. And the transition team simply can't function without strong sponsor support and clear communication.
- ◆ The classic challenge for most teams is the development of a common purpose, clear roles of all involved including team sponsors and stakeholders and developing working relationships to support the goal of the team.
- ◆ Accept the fact that the team has to grow and bond together over time. There will be bumps along the way – have to acknowledge this and flow with it.
- ◆ The development of the project scope and work plan should happen early.
- ◆ Address team logistical issues early including communication mechanisms (telephone, e-mail, file directories, shared files on common drives).
- ◆ Communication plan and strategy should be done early in the team's workplan. From that point forward communications should be systematically planned and executed with an emphasis on the audience's needs. Staff wants information that is relevant to them and their working environment.
- ◆ Be cautious about information released - especially regarding activities that might not come to fruition.
- ◆ Build in feedback loops wherever possible and gather formal feedback in a timely way throughout the process. Plan for and strategically gather information.

Gaylea Wong

Gaylea Wong is Associate Registrar, Enrolment Services at The University of British Columbia. She has more than 20 years experience in higher education administration and has held leadership roles in various professional associations. Gaylea served as PACRAO Vice President for Professional Development from 2000-2002. Contact: [gaylea@students.ubc.ca](mailto:gaylea@students.ubc.ca)

# Membership News

## MEMBERSHIP NEWS May, 2003

The Membership Committee is currently in the midst of its annual membership renewal drive. Email renewal notices were sent to approximately 395 current member institutions in February. I am extremely pleased to report that, as of May 5, 198 schools have renewed their PACRAO membership for 2003. Tina Toma, Treasurer, and I appreciate the timeliness of this response. If you have not processed your renewal payment by this time, please send your membership fee of \$75 to Tina's office at the University of California, Irvine, 215 Administration, Irvine, CA 92697-4975.

In addition to the membership drive, the committee is pleased to announce that the PACRAO brochure has been revised and redesigned for the first time in ten years! Please take a few minutes to review it on our new web site and take note of the interesting and informative information about our organization. Our region now includes the provinces of Manitoba and Saskatchewan, and the brochure contains detailed descriptions of each standing committee. The publication states that PACRAO was the first regional organization to create a Diversity Development Committee and includes a description of the new Emerging Professionals Institute (EPI). If you would like a hard copy brochure or are aware of any two-year or four-year institutions that are not members and would benefit from this information, please email me at [dear@usc.edu](mailto:dear@usc.edu), and I will send them a copy.

The committee is very excited about the new PACRAO web site and soon to be released Membership Directory. Upon its release, all members will be given a password and the capability to update their own membership directory information. Every effort will be made to match the recently submitted directory information that you completed with your 2003 renewal forms against this new web site. However, if you notice any correction that needs to be made to the listing of your own institution, please remember that you will always have the ability to immediately make the adjustment.

The membership committee consists of five dedicated staff from the University of Southern California: Martha Navarro, Stephanie Hillman, Jean Knox-Stephens, Ruth Johnson, and Carolyn Williams. The committee is extremely grateful to last year's Vice President for Membership, Chris Butzen, for his mentoring and providing us with so many valuable files and excellent suggestions to work with.

Fred Dear  
University of Southern California  
[dear@usc.edu](mailto:dear@usc.edu)

## President's Message Continued

mittee have already put together ideas for an event that will set new standards for years to come. Take a look at the information that is already available on the PACRAO website. In the wake of everything 2003 has wrought, *Discover the Direction YOU Can Take* will not only be an affirming experience for all of you, but the compass that will set you on course for a brighter future. Program Co-Chairs Norm Rempel and Stephanie Mills will make certain of that!

Finally, seven distinguished members of our PACRAO family convened earlier this year to discuss what we could do about professional development, professional networking, and professional recognition for the individuals who are just coming in to our profession or realizing the need to expand their participation in the profession. In addition to Faith, Mala, Fred, and me, those professionals included Christine Kerlin, Dannette Sullivan, and Janet Ward. While AACRAO and other organizations have their own introductory courses

and workshops, we wanted to do something here at home—in our own region—for our own members. We hope the **PACRAO Emerging Professionals Institute (EPI)** will meet those need: providing a quick start for all of our up-and-coming professionals with a broad introduction to the landscape of admissions and records and the vital relationship-building of participation in PACRAO! Watch for more details about our first EPI later this year!

As I indicated in the last issue, I hoped that my term as President would be one of emergence—not only of new ideas, but of new leaders as well. I am deeply and humbly grateful for all of the talent that has been shared thus far in the name of PACRAO. Indeed, it has been *your* success!

## PACRAO EPI

### ANNOUNCING THE PACRAO EPI

### Nurturing the Next Generation of Admissions and Records Professionals

With a growing number of colleagues expected to retire over the next few years, one wonders who will be tomorrow's leaders, both in our profession and in PACRAO. To encourage proactive succession planning and to provide a unique professional development opportunity for the next generation of admissions and records leaders, the Executive Board approved a proposal last January to meet the challenge. A team of PACRAO leaders, convened by President Cliff Ramirez, originator of the concept, has developed the PACRAO Emerging Professionals Institute (EPI), A Partnership with Noel-Levitz.

The goal of EPI goal is to develop the emerging stars of our profession—those new to admissions and records, those taking on new responsibilities and expanding their authorities, and those identified by their campuses as potential leaders for the future. Typically, these are seldom the participants of our PACRAO annual meeting.

Over the course of a day and a half, EPI is designed to provide a comprehensive introduction to professional concerns, focusing on areas such as leadership, ethics, service quality, career strategies, and individual competencies. In individual break-out sessions, a broad

overview of the responsibilities of admissions and registrar professionals are explored. Optional, independent, half-day workshops at the end of the EPI, extend an opportunity to concentrate solely on FERPA, web recruitment, and forecasting student populations.

EPI combines the experience of respected leaders in our profession with the consulting expertise of Noel-Levitz, highly respected experts in the field of enrollment management. What distinguishes EPI from other programs is its focus on interactive learning, developing professional relationships, and nurturing our region's future leaders.

The first EPI is now scheduled for October 20-21, 2003, at the Hilton Universal City. A conference rate of \$135/night, single or double occupancy is available, but residency is not required for EPI participants. The registration fee of \$149 for PACRAO members and \$199 for non-members has been kept intentionally low to maintain a program that is affordable for emerging admissions and records professionals from throughout the United States. In addition, the PACRAO Travel Grant is made available to PACRAO members wishing to attend the EPI.

Watch for further registration and program information on the PACRAO website, [pacrao.org](http://pacrao.org). Hotel rooms are now available by calling (818) 506-2500 and mentioning "PACRAO EPI."

# PACRAO 2003



Make sure that you plan and budget for the PACRAO 2003 Conference in Coeur d'Alene, Idaho, November 2-5. Please visit the conference website at: <http://wasu.pacrao.org> and click on conferences!



PACRAONews  
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## PACRAO EXECUTIVE BOARD

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### President

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## 2003 PACRAO MEETING CHAIRS

### Conference Co-Chair

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## 2002-2003 PACRAO Executive Board Nominees

### Nominee for President Elect Dannette M. Sullivan

In a much simpler time, Dannette was named the Registrar at her alma mater, Carroll College in Helena, Montana at the ripe old age of 23. She served in that capacity until 1987, when she became the University Registrar at Seattle University. In 1997, she added the duties of overseeing the Enrollment Services division to her Registrar's duties and served that dual role until 2001. Since 2001, she has served as the Assistant Provost for Enrollment Services and Student Success at Seattle U. Dannette has been a long-time member of PACRAO and AACRAO, serving as Conference Program Chair for PACRAO's annual con-



ference in Spokane in 1994 and Co-Local Arrangements Chair for the Seattle AACRAO conference in 2001, among other duties through the years. She was the former chair of Montana-Acrao and the founding chair of PROW, the Private Registrars of Washington. She is a member of the Conference of Jesuit Enrollment Managers and an honorary member of the Conference of Jesuit Registrars.

### Nominee for Vice President

### for Publications and Information Technology David Johnston

Currently Registrar at the University of Calgary in Alberta, Canada, David began his career in higher education as an Admissions Officer at Simon Fraser University, thereby avoiding a less than promising career in law. He subsequently held a variety of positions at SFU, including Director of Registrar Services at the innovative Harbour Centre Campus in downtown Vancouver, BC. In 1998 David gathered up his family and moved south to take the position of Associate Registrar at the University of California, Davis where his primary responsibility was the student information system. After a rewarding 4 plus years in California, the call of the North became too much



and he returned to Canada to take up his current position in Calgary. David has been active in PACRAO, co-chairing the 1997 Local Arrangements Committee and the 2001 Publications Committee and is currently chairing an AACRAO committee on Web based services in higher education. His current interests are technology in higher education, effective integration of services to students and the emergence of the "student as consumer" (after recently being served a letter from the Better Business Bureau regarding a matter of academic discipline).

### Nominee for Treasurer Janet V. Danley, Ed.D

Janet Danley was appointed Interim Executive Director for Enrollment Services at Washington State University in May 2002. Janet joined WSU in January 2001 as Associate Director of Admissions. Prior to coming to WSU, Janet served as Registrar and Director of Institutional Research at Lewis-Clark State College in Lewiston, Idaho; University Registrar and Co-Admissions Director at the University of Arkansas-Monticello; and Assistant Vice President of Academic and Student Affairs at Northern Montana College. Janet completed her Master's of Public Administration degree at the University of Montana in 1989 and her Doctor of Education degree at the University of Arkansas-Little Rock in 1998. Janet's doctoral dissertation research focused on the types of academic



and social assistance at-risk students need to be successful college students. She has published articles on topics about at-risk students, student experience, and effective service delivery to students. Janet has presented papers and led workshops at local, state, regional, and national conferences for AACRAO, PACRAO, and Datatel Users Group. She continues to conduct research and publish articles on student success and service delivery to students, two of her professional passions. She is an active member of AACRAO and PACRAO, serving as session presenter and facilitator, on the PACRAO writer's team, and as committee member. Janet is a native of New Mexico.

# PACRAO Professional Development and Travel Grants

As one means of returning assets to the membership, PACRAO makes funds available to support professional development activities. PACRAO Travel and Professional Development Grants provide opportunities which benefit individual members and the entire association.

**For additional information, contact:**

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**Professional Development Grants**

Professional Development grants are awarded to members who pursue research, specialized training, website development, publications, or other activities which enhance a member institution or PACRAO. Applicants are asked to submit:

- The application form (below).
- A written proposal which includes a description of the project, project objectives, itemized expenses, an outline of tasks, and a timeline for completion.
- A letter of support from the applicant's supervisor/manager.

Grants are generally \$500, but may be as high as \$1,000. Grant funds are issued at the completion of the

project.  
**Travel Grants**

Travel grants are awarded to assist active members to attend the PACRAO annual conference. Special consideration is given to applicants who are first-time attendees, persons of color, or members of institutions whose funds are especially limited. Applicants are asked to submit:

- The application form (below).
- A written proposal describing the reasons for applying for a travel grant, estimated costs, and the amount of costs the applicant's institution is able to fund.
- A letter of support from the applicant's supervisor/manager.

Travel grants provide up to \$500 of support. Grant funds are issued at the completion of travel with appropriate documentation of expenses.

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## **PACRAO Grant Application** *Deadline - August 15, 2003*

**Type of grant sought:**

Professional Development Grant

Travel Grant (Coeur d'Alene, Idaho, November 2 - 5, 2003)

**Applicant Information:**

Name \_\_\_\_\_

Title \_\_\_\_\_

Institution \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Fax \_\_\_\_\_

E-mail \_\_\_\_\_

Please attach your written proposal and a letter of support from your supervisor/manager.

**Send application materials to:**

Faith Weese  
PACRAO Grant Application  
Grand Canyon University  
3300 West Camelback  
Phoenix, AZ 85017