



Welcome 2026 BMI Participants!

You are receiving this letter to confirm your registration for Track 2 at the 2026 WACUBO Business Management Institute and to provide you with advance copies of the curriculum materials as well as additional helpful information. We have prepared an interesting program for you and look forward to being with you from August 2, through August 5 at UC Santa Barbara.

The Track 2 program is designed for learning through active involvement. We will begin on Tuesday with a session titled "Introduction to Case Study Format & Learning Leadership Lessons." During this time, we will discuss several example case studies to help guide your learning and analyze potential leadership opportunities. These case studies are included in this email for your review prior to joining the Institute. **We ask that you have these materials accessible when Track 2 convenes on Tuesday, August 4.** This year's Track 2 participants will be separated into two groups, and each group is scheduled to participate in case study group sessions after the initial introduction on Tuesday. During your time at BMI, you will present your own case study to be analyzed and discussed within your assigned group. The case study sessions will be facilitated by current and former higher education business leaders.

In addition to considering prescribed cases, each student is expected to provide a written case study for discussion. Guidelines for preparation of these cases, and examples of cases prepared by past students are on the following pages. Our small group case study discussions will be facilitated by higher education administrators who have the expertise to bring focus to the discussions. Please email me (yolandaanglin@gmail.com) if you have any questions about preparing your case study as we want each session to offer solutions to problems that you may be currently facing. I apologize for the short time frame in which you must prepare your cases. However, you'll be pleasantly surprised how quickly you will be able to write a page or two about your personal real-world situations. **Your case study should be emailed to me no later than Wednesday, July 29, 2026.**

You will be sent via email your small group's case studies prior to BMI. Please watch your email for the case studies around July 30. You will need the case studies accessible during your small group case study breakout discussions.

Our curriculum is adjusted each year based on input from past participants to ensure a meaningful learning experience for every participant. BMI strives to deliver relevant and beneficial content. We encourage you to give us your honest feedback to help us in "our pursuit of excellence" and to ensure that your experience is the best it can be.

In addition to interacting with us, you will also have the opportunity to work with other Institute faculty, who bring extensive experience in higher education with their own unique perspective and approach. Feel free to share with us your comments, concerns, questions or ideas.

We look forward to meeting and working with you at BMI, August 2-August 5. See you soon!

Dr. Yolanda Anglin, Track 2 Class Leader

WACUBO Business Management Institute
Western Association of College and University Business Officers
Business Management Institute at Santa Barbara
Track 2 August 2-August 5, 2026

Guidelines for Preparing Your Case Study

Discussions of personal real-life cases provide the opportunity for students to talk about their own real-life experiences with similar circumstances and to apply our recommended case study method. The student cases expand upon this aspect of the program and provide each student the opportunity to present to their discussion group a situation, problem or set of circumstances that warrants discussion or advice. Since cases often reflect situations at a participant's home institution, members of the class are to treat the material **in confidence**.

Case Format

- ✓ Background of the situation, including the organization relationships of individuals involved. Include an organizational chart.
- ✓ Relevant facts about what occurred to create the current state
- ✓ Questions
- ✓ Options
- ✓ Case Objective

Written guidelines

- Limit your case to 1 – 2 pages at most.
- Please prepare your case study and submit it electronically to me at yolandaanglin@gmail.com **no later than Wednesday, July 29**
- Include your name on your case study
- You do not have to include your institution name or names of parties involved, if you choose not to

Ideas for case studies that have been covered by previous participants:

1. Ethical dilemmas or situations of questionable nature
2. Dealing with crisis on campus, public relations or emergency management issues
3. Perceived favoritism in terms of resources and application of institutional guidelines
4. Planning for and implementation of new technologies, revised processes and other changes
5. Budget cuts and their aftermath
6. Dealing with harassment and other inappropriate behaviors
7. Re-organizations and its consequences.

All participants will review together the enclosed sample case studies:

Federal Funding in Jeopardy
Yvonne & Alexander
Budget Challenges, Solutions and Unintended Consequences

Sample Student Case #1
Federal Funding in Jeopardy

The federal funding agreement requires the separation of all expenditures into one of two classifications, allowable and not allowable. An allowable expenditure is defined as one that can be included in the total amount used in the calculation of the reimbursement fee charged to the federal government. Written guidelines were issued, campus-wide and to all accounting sections, explaining the requirement and all account coding in order to properly classify a given expenditure. The intention was for all campus departments to follow the guidelines and for the accounting sections to monitor the coding for accounts within their area of responsibility. A correcting entry was to be made for any expenditure that was misclassified. If government audits revealed that proper classification of expenditures was not occurring, federal funding could be jeopardized.

Laura is an accountant in grant accounting. She is also the accountant in charge of the analysis for all accounting sections. Each year before closing the books, the accounting department must make a tremendous effort to ensure proper coding of all expenses. Overtime is required, drawing employees from all accounting sections. Significant volumes of misclassifications are identified and corrected in all sections except Federal. This led Laura to conclude the following:

Departments either do not understand established guidelines and are not asking for help or they are ignoring them completely.

Accounting sections, except for grants, are not regularly monitoring (say monthly) the expenditures.

Laura has quite a dilemma, if her conclusions are correct. It is too late to consider options to the overtime for this year. The reclassifying of expenditures must be completed before fiscal year-end closing. Next year because of the expected budget crunch, she is positive overtime will be severely curtailed, if not eliminated.

How can she secure cooperation from campus departments to follow the classification guidelines? How will she secure the cooperation of the accounting sections to monitor the accounts on a regular basis? It appears obvious to her the other sections don't see the monitoring as part of their regular duties. What can she do to change the mindset?

Sample Student Case #2
Yvonne and Alexander

You are supervisor of Yvonne, who is in charge of processing travel expense reimbursements for her university. As a contractor to the US government, the university has had to implement strict procedures for payment to any non-US citizens or permanent residents, including paperwork to be completed by the foreign nationals, as well as copies of their passport, visa and other required documents.

In early February, Yvonne received 20 payment vouchers for travel expense reimbursement from a college sponsored conference hosted by the Physics Department. All of the individuals were citizens of Russia, and the conference had been held in November of the previous year. Several days later, Yvonne received an additional payment voucher from the same department including an invoice for \$15,000 from the Moscow Four Seasons Hotel for the Physics conference. This purchase had far exceeded the \$500 limit for purchasing without a purchase order.

Yvonne contacted the sponsor, Professor Alexander Dimetri, Chair of the Physics Department, and informed him of the necessary documentation and the issue of prior approval of purchase orders. Instead of providing the paperwork, he sent a lengthy email to the Vice President for Finance, citing Yvonne's unacceptable and uncooperative behavior. He also asserted that her actions were making the university look very unfavorable to his colleagues overseas by not paying obligations in a timely manner.

The Vice President forwarded the email to you with questions; "What seems to have happened here? Why were these travel claims not paid sooner? Have they been paid as of now? Do you understand the importance of the academic side of the house and that their needs are always of utmost importance? Do we need to send your staff to customer service training?"

How do you handle this situation?

Sample Case #3

Budget Challenges, Solutions and Unintended Consequences

The enrollment of the university has declined with a corresponding reduction in state allocations. Across the Business Affairs units, departments have been asked to cut operating expense budgets by five percent. Raul is the new supervisor of Parking Services, an auxiliary activity that reports to Business Affairs. Raul has been asked to also reduce operating costs by five percent and at the same time increase revenues by seven to ten percent.

Raul and his staff developed a plan to achieve this task. The Field Operation supervisor hired additional student enforcement officers to increase citation issuance. More meters were placed around campus to promote the convenience of legal parking. Permit sales implemented a fee for visitors and conference attendees, and the systems analyst developed productivity programs to cut operational costs. After a few months, the revenue increased and, through web-based programs and forms, operational costs had been reduced. In the Business Affairs group, Raul's operation was known as "a cash cow."

In order to promote positive customer relations, Parking Services continued to provide services with lockouts, jump starts, and minor vehicle assistance--representing thousands of dollars of in-kind services each year. Concurrently, however, there was an increase in ill feelings among the community members having to pay to park, and/or getting tickets for parking illegally. More students were being "caught" parking illegally and complaining to the student newspaper and upper administration. The President was overheard making disparaging comments about the image of parking on campus. In addition, the employees in the Parking Services Office took in an earful from its "customers" who had been cited.

Has Raul gone too far in generating revenues at the expense of maintaining positive customer relations? What do you advise Raul to do, if anything?

Introduction to Case Study Methods

What is a case study?

As used in business school curriculum, it is a description of a work situation in which students are placed in the role of decision-makers. Case material may include descriptions of the major role players, history, financial data, and other information. Students work through a process to recommend a course of action.

Characteristics

- More than one right answer
- Sometimes there may be no solution or right answer
- Move beyond your learning to act
- Learn from others

Learning opportunities

- You can't think of everything alone.
- Others' ideas are valuable.
- Consider trade-offs

Professional development from this program

- Critical thinking and reflective learning
- Organization--what is relevant and what is less so
- Communication and public speaking
- Working with teams
- Putting yourself in the role of others
- Creativity in a risk-free environment
- Have fun!

Introduction to Case Study Methods

Case Studies, Harvard Business School (HBS)

Introduced to business education in 1925 by HBS faculty, the case study method is a powerful interactive learning process that brings the complex and dynamic realities of business analysis and decision making into the classroom. The cornerstone of the school's renowned general management approach, the case method provides students with the transcendent skills, insights, and self-confidence required to meet the interdisciplinary demands of real business situations.

Pioneered by HBS faculty and one of the highlights of the HBS experience, the case study method is a profound educational innovation that presents the greatest challenges confronting leading companies, nonprofits, and government organizations—complete with the constraints and incomplete information found in real business issues—and places the student in the role of the decision maker. There are no simple solutions; yet through the dynamic process of exchanging perspectives, countering and defending points, and building on each other's ideas, students become adept at analyzing issues, exercising judgment, and making difficult decisions—the hallmarks of skillful leadership.

- When students are presented with a case, they place themselves in the role of the decision maker as they read through the situation and identify the problem they are faced with. The next step is to perform the necessary analysis—examining the causes and considering alternative courses of actions to come to a set of recommendations.
- To get the most out of cases, students read and reflect on the case, and then meet in learning teams before class to "warm up" and discuss their findings with other classmates. In class—under the questioning and guidance of the professor—students probe underlying issues, compare different alternatives, and finally, suggest courses of action in light of the organization's objectives.
- As you watch a case study unfold in class, you'll see students doing 85 percent of the talking, as the professor steers the conversation by making occasional observations and asking questions. This classroom interaction is enriched by classmates from diverse industries, functions, countries, and experiences. At the end of the class, you'll be amazed at what you learn from exchanging ideas with your classmates.
- Class participation is so important to the learning model at HBS that 50 percent of a student's grade in many courses is based on the quality of class participation. This requires students and faculty to work closely together—another hallmark of the HBS experience. During their time at the School, students study and prepare over 500 cases.

Steps outlined in the Harvard Business School website

- Go through case and muster details
- Put yourself in the role of protagonist and think “What would I do?”
- Come up with rationales for your ideas
- Test your best ideas and share analyses among peers.
- Develop conclusions

How to Approach a Case

1. ***Read the case through***
 - Do not make value judgments or "take sides"
 - Read only for "mood," e.g., fear, stress, calm, anger, excitement, etc.
2. ***Re-read the case***
 - Underline all "important" information
 - Judge whether "Could this possibly be important to the case?"
3. ***Develop an organization chart***
 - Who reports to whom
 - Area of responsibility
 - Formal communication lines
4. ***State problem or problems***
5. ***Consider the objectives of the institution, department, or individual***
6. ***Identify solutions***
 - Be innovative and creative
 - Brainstorm
 - Include everyone (within reason)
7. ***Determine possible consequences and evaluate options***
8. ***Prioritize solutions***
 - Especially first three or four
 - Provides backup solutions in case the number one solution is turned down or does not work
 - Saves going back and analyzing everything from scratch

What students can expect from the group facilitator

- There are many or no "correct" answers to the case studies and the facilitator's role is to help your group find a well-reasoned approach to the issue.
- The facilitator will encourage discussion and will keep the group focused both on the case problem and on the process being followed.
- The facilitator may ask questions of the group or of individuals to encourage all members of the group to participate in the discussion.
- At the end of the discussion, the facilitator may share some relevant experiences in his/her own career.
- The facilitator will ensure that the discussion moves along in an efficient manner to finish in the time allotted.

Student Cases

- You will be assigned to a small group for case study discussions and be informed of a time slot so you will know when you will present your case
- You will each present your own case in your discussion group that will act as a sounding board and sort of consulting group for you.
- **All discussions are to be kept strictly confidential, as the cases may involve sensitive matters and deep feelings.**
- Your facilitator will work with your group to assure that all cases have been distributed, to determine an order for presentation, and to set expectations for the approximate amount of time allocated for each case.
- You will be asked to start by describing the facts of the case and to respond to questions from the group. Then the group will move into brainstorming and will propose possible options and solutions for consideration.