

# directions

WILLAMETTE UNIVERSITY MBA Atkinson Graduate School of Management



PEOPLE  
PLANET  
PROFIT

STORIES THAT GO BEYOND THE BOTTOM LINE ...

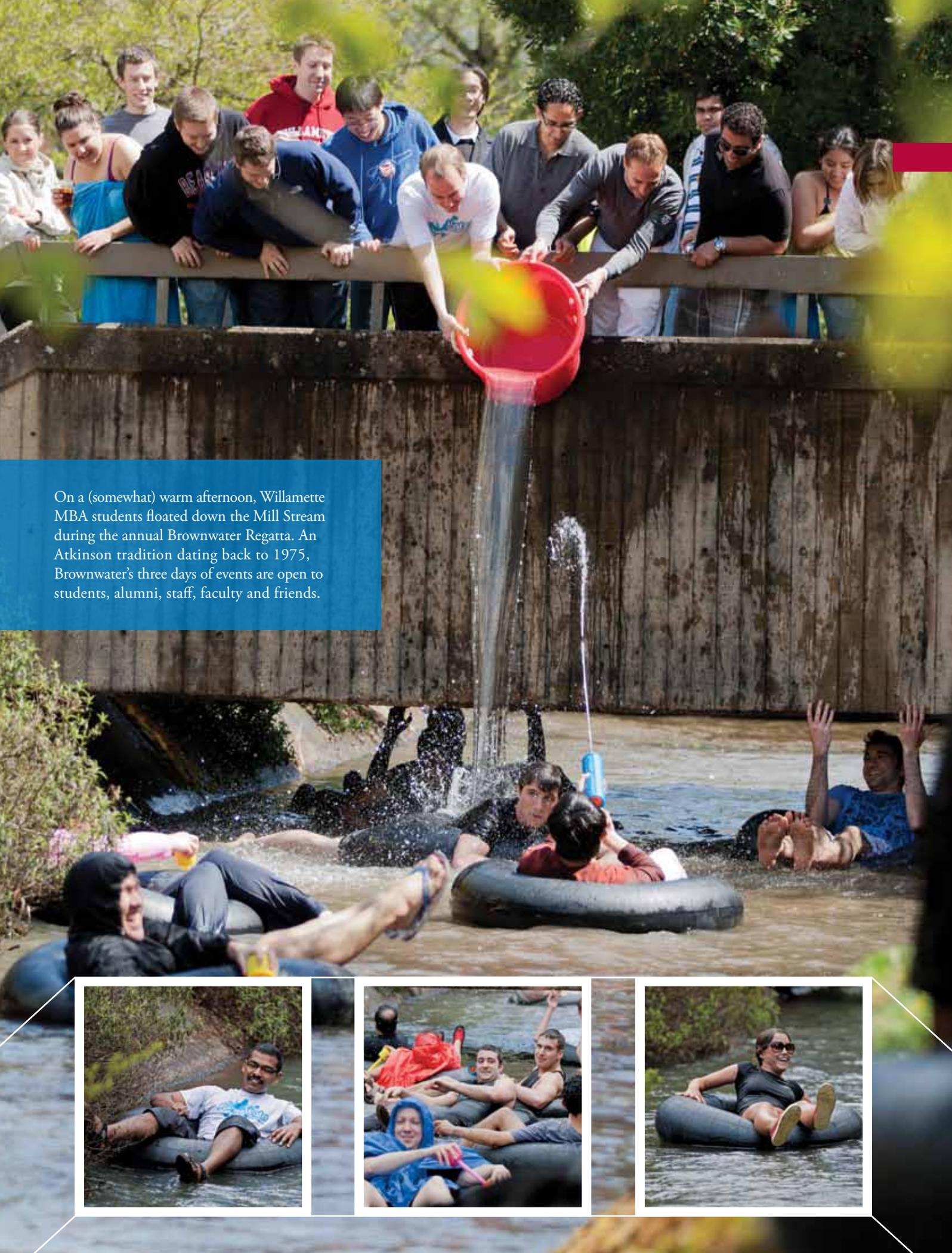
## **SALUTE!**

The Oregon Wine Industry's  
Sustainable Success

## **WILLAMETTE MBAs GO TO WASHINGTON**

Alumni Making a Difference  
in the Nation's Capital

2011-12



On a (somewhat) warm afternoon, Willamette MBA students floated down the Mill Stream during the annual Brownwater Regatta. An Atkinson tradition dating back to 1975, Brownwater's three days of events are open to students, alumni, staff, faculty and friends.



## BEYOND THE BOTTOM LINE ...



### 10 Salute!

THE OREGON WINE INDUSTRY'S  
SUSTAINABLE SUCCESS



### 16 Willamette MBAs Go To Washington

ALUMNI MAKING A DIFFERENCE  
IN THE NATION'S CAPITAL

### 24 Angels Among Us

WILLAMETTE MBA ANGEL FUND  
MAKES NATIONAL HEADLINES



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## When Dean Debra Ringold says that the Willamette MBA program “fights above its weight” ...

... she’s talking about exceeding expectations.

**IN SPORTS** and in management, stories of the underdog succeeding inspire and energize. We love to hear the story of the small business that successfully competes with the national chain. We’re delighted when the local non-profit organization lands a large grant to help sustain its programs.

Everyone has the power to make a difference in his or her community. It takes hard work, dedication to one’s craft, and an honest, ethical approach.

That’s what we do at the Willamette MBA program, and our efforts are being rewarded. Willamette MBA graduates are leading fulfilling and successful careers in business, government and not-for-profit organizations around the world. Our global network continues to expand to new countries and new organizations. Our programs have earned national and international recognition.

*Forbes* magazine again recognized the Willamette MBA as a “best business school” for 2011, based on the return on investment experienced by graduates. Willamette is the only MBA program in Oregon and one of only two in

the northwest ranked on *Forbes'* list.

In 2010, the Graduate Management Admission Council honored the Willamette MBA Program with its highest honor — the “Team MBA Institutional Award.” This distinction recognizes a school that embodies community service and a commitment to ethics and the environment.

In addition, the Aspen Institute’s Beyond Grey Pinstripes survey ranked the Willamette MBA among the top 50 programs in the nation committed to ethics, environmental stewardship and community service.

This past year, *Inc.* magazine placed our “new ventures” entrepreneurship class among the top 10 in the nation. We were joined on the list by Stanford University, the University of Chicago, and the Wharton School at the University of Pennsylvania.

We are delighted by these accolades — especially because they recognize the elements of our program that come natural to us. Our mission and our culture are such that we emphasize ethics, environmental stewardship, community service and innovation in our classes and in our interactions with one another on a daily basis. We hold our own against larger institutions because we’re innovative, nimble and deeply committed to our students.

### **Sustainability — Our Tradition for Nearly 40 Years**

This issue of *Directions* discusses the concept of sustainability. Most discussions of sustainable practices center

on “going green.” Though environmental responsibility is one part of a sustainable business plan, it is not sufficient. True “sustainability” encompasses an organization’s commitment to society — people, planet and profits.

Programs like PACE, the Oregon Ethics in Business Awards, and the capstone project in the MBA for Professionals all push our students to integrate and think strategically. These courses are important components of our curriculum because they provide the laboratory in which students can explore and apply essential management knowledge.

Even during the recession we continued to invest in new faculty, new courses, new facilities and improved career management programs. Earning an MBA is an investment that our students make in themselves — and it is our responsibility to invest in our programs and people to make the experience as impactful as possible.

In fall 2011, three new full-time faculty members will join our team in human resources management, accounting and public management. During the 2011–12 academic year, we will be recruiting new faculty in quantitative methods and global management.

Several Mudd Building and Atkinson Annex construction projects were completed in 2010. Lab spaces are now being added to the Atkinson Annex for special programming and curricular support. This includes an interactive “collaboration classroom,” the

rapid prototyping lab (and three-dimensional printer), and a financial trading floor to support the O’Neill Student Investment Fund.

Thinking “sustainably” is what allows the Willamette MBA program to “fight above its weight.” We strive to prepare our graduates for successful careers and exceed expectations. ❶

—Debra Ringold, Dean and JELD-WEN Professor of Free Enterprise



Welcome to *Directions* ... After Atkinson Advances in the '80s and '90s, and the Dean's Report in the 2000s, *Directions* is our new annual magazine on all things related to the Atkinson School and Willamette's MBA programs. This issue includes articles on three influences of management decision making:

people, the planet and profits. The stories throughout the publication illustrate how our faculty, staff, students and alumni put these concepts into practice. Enjoy!

—Russell J. Yost, Editor

# Setting the PACE

*Willamette Early Career and Career Change (ECCC) MBA Students Serve Not-for-Profits and Government Organizations in Oregon and Beyond*

## PRACTICAL APPLICATIONS

for Careers and Enterprises, more commonly known as PACE, is a hallmark of the Willamette ECCC MBA curriculum. More than 10 years old, PACE has grown and adapted to an ever changing student body. During the ECCC MBA program's annual Compass Week activities, anxious student teams connect and prepare for an experience

that can be both résumé building and life changing.

As word about PACE spreads across Oregon (and now, the world), non-profit and government organizations compete to be selected as clients. The result: more dynamic projects, more committed clients and more value added to the communities in which the clients serve. Social entrepreneurial projects and international

not-for-profits now round out PACE's client portfolio. For the first time, PACE 2010-11 included two clients outside Oregon — adding an additional challenge to the already complex (but rewarding) experience. Students learned how to manage teleconferences and virtual meetings, commonplace in the modern world of management.



### Friends of the Children

**Location:** Portland, Ore.

**Project:** marketing and other strategic initiatives to enhance the 'Bowl-a-thon' fundraiser

### City of Albany

**Location:** Albany, Ore.

**Project:** analyze and create a business plan for the Albany Municipal Airport and applicable revenue generation opportunities

### Mercy Corps Northwest

**Location:** Portland, Ore.

**Project:** operational plan and implementation of the renter equity program through Mercy Corps and Portland Development Commission

### Department of Land Conservation and Development

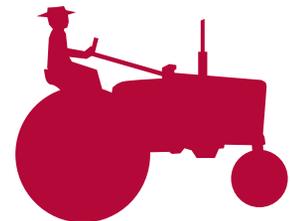
**Location:** Salem, Ore.

**Project:** business case preparation of DLCD's comprehensive plans through an online application

### Burundi Friends International

**Location:** San Diego/Burundi

**Project:** create a strategic plan to increase the organization's presence, focusing on fundraising and out-of-country operational projects



### Oregon Department of Transportation

**Location:** Salem, Ore.

**Project:** make better use of ODOT's land inventory, with business plan preparation for farming these lands to make feedstock for biofuel application

## 2010-11 PACE Clients

### Oregon Public Broadcasting

**Location:** Portland, Ore.

**Project:** review, strategize and research recruiting sources both locally and nationally with a focus on affordable recruiting and increasing applicant diversity

### The Imani Project

**Location:** Portland/Kenya

**Project:** develop an operational five-year plan that includes fundraising, corporate sponsorship, NGO partnerships and board representation



### New Avenues

**Location:** Portland, Ore.

**Project:** develop a new t-shirt business through strategic and operational plans

### Springboard Innovation

**Location:** Portland, Ore.

**Project:** two related projects, first 'impact investing' on data gathering reflecting the impact strategies and second, applying these strategies to Springboard's new initiative, 'Hatch - An Innovation Incubation Lab'

### Bonneville Power Administration (BPA)

**Location:** Portland, Ore.

**Project:** BPA created new power sales contracts for its 130 customers. Work with contractors to assist in IT systems, process redesign and testing, and finance while testing the new system

### Chicago Children's Advocacy Center

**Location:** Salem, Ore.

**Project:** develop a performance management and talent management system, incorporating core values, peer review and national/local benchmarks

# MBA Marketing “Takes Off” at Portland International Airport



**TOUTED AS** one of the nation’s “Best Airports for Business,” Portland International Airport (PDX) offered free wireless Internet long before other locations across the country. As the airport has grown, the Port of Portland sought a WiFi partner to keep PDX’s systems up-to-date. The Port’s commitment to cutting-edge practices and sustainable thinking

was a perfect match with the Willamette MBA’s mission of delivering innovative management education.

Travelers waiting at PDX now log on to find the Willamette University MBA logo prominently displayed on the welcome screen and WiFi information page. In addition,

signage throughout the airport (on directories and “power towers”) promotes the free WiFi and Willamette’s MBA programs.

Read more online:  
[willamette.edu/mba/news/2011/pdx](http://willamette.edu/mba/news/2011/pdx)

## Willamette Alumni Shine at *Portland Business Journal* Events in 2011

**IT’S NO SURPRISE** that Willamette alumni are outstanding leaders in their organizations and communities. That’s why two of the *Portland Business Journal*’s largest programs, the “Forty Under 40” awards and “Women of Influence” awards, recognized a long list of Willamette graduates in 2011. The recipients were praised for their success at work, community service and commitment to the economic vitality of the region.



**Portland Business Journal Women of Influence Honorees:**  
Elizabeth Large JD’96, Knowledge Learning Corporation, Vanessa Sturgeon MBA’03, TMT Development, Karla Wenzel CLA’83, Portland General Electric

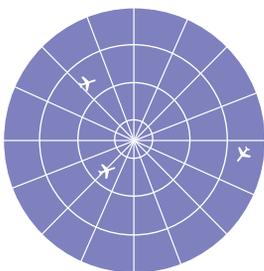
**Portland Business Journal Forty Under 40 Honorees:**  
From top left: Kevin B. Dull JD/MBA’99, Kaiser Permanente Northwest, Starla Goff JD’97, Smith Freed & Eberhard, Russell Yost MBA’05, Willamette University, Christopher Magana JD/MBA’04, West Coast Trust. From bottom left: Jared Short CLA’99, Regence BlueCross BlueShield of Oregon, Charles Turner MBA’01, Prudential Northwest Properties, JoDee Keegan JD’97, Dunn Carney.

Jenessa Meng (MBA'11) is now using her MBA skills at one of the nation's largest defense contractors, Raytheon.



## Honing Your Radar for Career Success

As a sophomore in college, Jenessa Meng MBA'11 knew that she wanted to pursue a graduate degree. What she didn't know was what she wanted to do with her degree once she finished.



**LOOKING AT** human resources, strategic management and diversity programs, she first considered law school. After talking with her mom and investigating different programs, she decided an MBA might be the best choice to meet her career goals.

Fast forward to the summer of 2010. Meng became one of the first members of her graduating class to secure a job offer after a successful summer internship. Armed with a savvy understanding of HR policies and procedures, she was set to work with one of the United States' largest defense

contractors — Raytheon. “If you would have asked me even two years ago where I would be working after graduation, I couldn't have told you,” Meng notes.

Meng made good use of her time at Atkinson. She not only assisted in establishing the Atkinson Consulting Organization, a student-run group focused on the industry of its name, but she actively sought opportunities to build her network and her experience. “It is what I would call ‘networking with a purpose’ — a highly focused approach to meeting people,” she explains.

This drive is what led her to Raytheon.

If Raytheon's name does not sound familiar, the technology developed by the organization should. In the early 20th century, Raytheon's radio technology could be found in households across the United Kingdom. After further study of the properties of radio frequencies, Raytheon then uncovered a new use for the technology to track the location of airplanes. This developed into what we now know as “radar.”

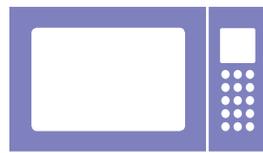
In 1945, a Raytheon employee accidentally placed a magnetron tube near a candy

bar, causing it to melt. Intrigued, the scientist placed the tube near corn kernels causing them to “pop.” After additional research, Raytheon discovered this technology could be used for conventional cooking. Thus, the microwave oven was born.

Ironically, Raytheon’s accidental success in discovering microwave cooking closely resembles Meng’s initial interaction with the company. Researching companies with strong HR development programs, she discovered Raytheon. The more she learned about the organization, the more her interest in the organization “heated up.” After interacting with Raytheon recruiters at the National Association of Women MBAs

conference, Meng patiently waited four months for the call for a first interview.

At this stage it was not, by any means, a done deal. After several phone interviews, Meng flew to the organization’s headquarters outside Boston for three grueling days of interviews and case discussions.



The more she learned, the more her interest in the organization “heated up.”

Her experience and interpersonal skills were analyzed and, ultimately, she was one of only seven students across the country to receive an offer.

Meng’s assignment in Ft. Wayne, Ind. wasn’t at one of

her suggested locations. However, her experience was, in her words, “outstanding and enjoyable.” Her summer was filled with projects that taught her about Six Sigma strategy, the creation of a leadership development website and go-cart racing with senior management (where she came in second!). An offer for

full-time employment followed, and she accepted.

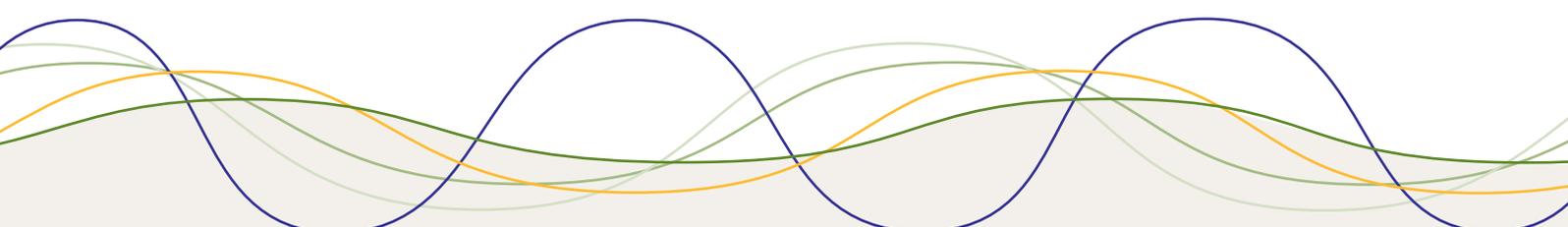
Like the invention of the microwave, the rest is history.

“The company has so much to offer someone interested in human resources,” she explains.

“Employees are motivated, valued and offered opportunities for continual development. It’s an organization that embraces performance management.”

As for her time at Willamette, Meng reflects fondly on her experiential team projects. She learned “how to become a leader while still being part of a community.” She also gained what she calls a “savvy understanding of human resources,” which helped her focus her interest. In the end, her hands-on approach to career management helped her land her dream job — at the perfect organization that may not have initially been “on her radar.”

—Russell Yost

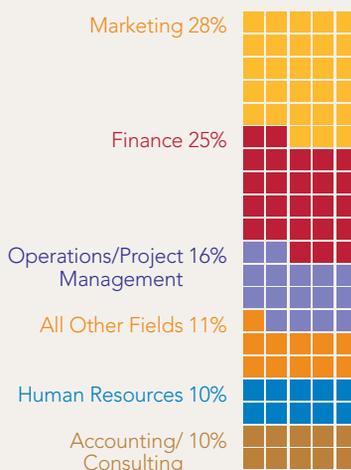


## Where do Willamette MBAs land after graduation?

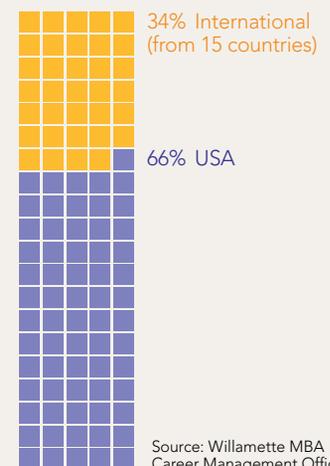
The organizations where Willamette MBA graduates work after graduation is as varied as the students who enroll in the program.

Class of 2011  
105 Total Graduates  
Average Age 26

### Going to work in



### Students from



Source: Willamette MBA Career Management Office

# directions





# Oregon Wine Pioneer

## People, Planet, Profits *and Palate*

by Mike Russell

**A**SK JIM BERNAU, FORMER ATKINSON STUDENT AND FOUNDER AND OWNER OF WILLAMETTE VALLEY VINEYARDS, ABOUT THE SMASHING SUCCESS OF HIS WINES AND YOU WILL LIKELY GET A SHORT LESSON ON LANGUAGE AND ECOLOGY; HE'LL TELL YOU, "IT'S ALL THANKS TO THE WINE'S *TERROIR*."

French for "of the earth," *terroir* (teh-wa) describes the unique combination of interrelated factors affecting the grape's growth: starting with slope, it includes orientation to the sun, elevation, microclimate, wind velocity and soil. While vintners must adapt to those factors outside of their control, they can exert some influence over a few key components: namely, the soil and the millions of beneficial creatures thriving among the vine's roots.

"From fungi to insects, these tiny creatures are the most amazing natural farmers," explains Bernau. They live in a symbiotic relationship with the roots of the vines. The fruit takes on the character of the soil in which it grows, enhancing aroma and flavor. Consumers enjoy that uniqueness, that 'personality.' In this context, appreciating wine tickles the intellect as much as the taste buds."

Successfully nurturing nature's fragile balance while exciting wine enthusiasts' appreciation has reaped Willamette Valley Vineyards (WVV) broad support. *Wine Spectator* magazine awarded WVV designation as one of the "Top 100 in the World." *Wine Enthusiast* gave the 2008 Pinot Gris a score of 90 in its November 2008 issue. Recently, Robert Parker's *Wine Advocate* recognized several WVV pinots ...

... including a 94 point score for the O'Brien Pinot Noir. Even in the hard times of 2010, WVV reported a modest increase in sales, despite concerns that consumers would 'trade down' in quality, or satisfy their thirst with cellar reserves.

**Atkinson roots.** The seeds of Bernau's success were sown at Atkinson, where he envisioned producing high-quality pinot noir for national and international markets with the support and involvement of thousands

of Oregon wine enthusiasts. From the beginning, the late professor of accounting, Earl Littrell, supported Bernau with advice, critique and several early morning meetings to review progress. As Bernau continued to grow his business, he never forgot the support and direction Littrell provided.

Upon his retirement in 2004, a scholarship honoring Professor Littrell was established; Bernau immediately saw a way to give back to the man who had helped him get his start. With a generous lead gift,

Bernau helped the scholarship become endowed, allowing Littrell's name to be honored into perpetuity.

**Cultivating acclaim from infamy.** Before 1966, no one had dared to plant pinot noir in Oregon. Today, comprising 60 percent of the Oregon wine industry's planted acres, it is the state's primary grape — this, in spite of the plant's notoriety among vintners.

Typically, pinot noir is less vigorous than other varieties. On the vine, it is sensitive

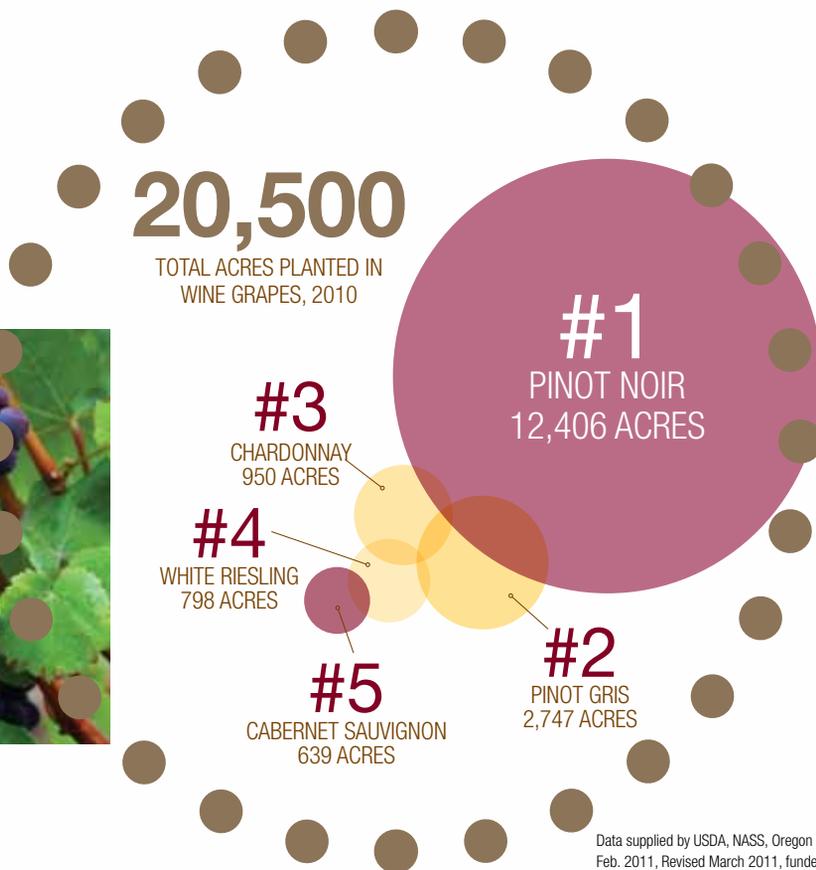
to wind and frost; quality production requires yields be kept low; its preferred soil type limits its versatility; and it demands particular pruning techniques. What's more, its thin skin makes it susceptible to bunch rot and other fungal diseases while the vines are vulnerable to mildew and leaf viruses. Given the extent of sensitivities, pinot noir has acquired a difficult reputation: André Tchelistcheff, mentor to a generation of American winemakers, famously declared that "God made cabernet sauvignon whereas the devil made pinot noir."

Undeterred, Oregon wine-makers have cultivated acclaim from this infamously difficult variety. In January 2011, *New York Times* wine critic Eric Asimov heaped heavenly praise on Oregon's 2008 vintage of pinot noir.

**Pleasing palate and planet.** Given pinot noir's sensitivity, and its central role in Oregon winemaking, it should come as no surprise that local vintners are concerned about the effects climate change might have on their livelihood.

Over the past half-century, many wine regions around the world have noticed a decline in frost frequency, a shift in the timing of those frosts, and warmer growing seasons. So far, these changes have favored the Willamette Valley's pinot noir growing season. However, increasingly variable weather in the future could curb that advantage.

## Top Grapes — Oregon's 5 Most Plentiful Wine Grape Varieties



Data supplied by USDA, NASS, Oregon Field Office, Feb. 2011, Revised March 2011, funded by the Oregon Wine Board.

# TIPPING POINT..!

"We are rapidly approaching a global tipping point, and consumers hold the power to change the world."

Conservative estimates of warming rates may nudge the valley's average temperature — historically ideal for pinot noir — toward the limits of preferable growing conditions.

Although Oregon winemakers' carbon footprint pales in comparison to other sectors of agriculture, regional efforts are taking strides to reduce that impact further. A handful of programs have emerged to help Oregon wineries reduce environmental impact, improve operations and articulate those efforts to consumers.

One such program, the Carbon Neutral Challenge ([www.cncwine.org](http://www.cncwine.org)), helps participating wineries and vineyards measure, track and reduce greenhouse gas emissions voluntarily, with the ultimate aim of attaining carbon neutrality. Although CNC participants concentrate on curbing their respective environmental impacts, they also collaborate on addressing sustainability issues facing all Oregon wineries and vineyards. Combined, the 14 participants represent approximately 20 percent of Oregon wine production.

By doing environmental good, wineries can do well financially, too.

A 2007 study on "core wine consumers" asserted that sustainably minded production efforts serve as a favorable differentiator. According to the study, conducted by Full Glass Research in partnership with the Oregon Wine Board Core, "core wine consumers are interested in purchasing sustainable wines because they want to support producers of sustainable products and because they believe it to be better for the environment. However, many [consumers] remain confused about exact definitions and certifications; accessibility is a key barrier to purchase." To clarify consumers' uncertainty, advance sustainable wine production, and help sustainably driven wineries distinguish themselves, the Oregon Certified Sustainable Wine (OCSW) initiative was introduced in 2008.

According to the OCSW website ([ocsw.org](http://ocsw.org)), there's a new breed of wine connoisseurs who

"are no longer content just to drink great-tasting wines. They want to know how the wines were made. They want to be assured that the grower and winemaker treated the land and the process

respectfully. That's where OCSW comes in. [They] combine third party certifications and give the wine buyer one clear mark with which to easily identify an Oregon Certified Sustainable Wine." The mark indicates that the wine was produced using responsible agricultural and winemaking practices certified by an independent third party. Consumers now have a clear, easy choice; 21 Oregon wineries currently carry the OCSW logo on their labels.

**Tying terroir to sustainability.** When asked how he justifies the increased expense of growing organically and behaving sustainably, Bernau responds; "Cost doesn't matter, it really doesn't. It's everyone's duty to conduct themselves and their businesses in such a way that is respectful to everyone else. That means, by analogy, that you ensure you're not throwing your garbage into your neighbor's yard. Every one of us has this duty. No enterprise can ignore its externalities; company income statements must take reasonable

consideration of environmental outcomes. It's going to take a lot of innovation to re-invent American business. The best place for this [innovation] to occur is in graduate-level education."

In addition to the recognition received for the quality of his wines, Bernau has also been acknowledged for his efforts in making Willamette Valley Vineyards more sustainable.

Environmental responsibility isn't just an ethical decision for Bernau; there are tangible business benefits, too. "One of the benefits of doing the right thing: it always seems like we're rewarded by better outcomes. Customers base choices not only on value, but also on values. We are rapidly approaching a global tipping point, and consumers hold the power to change the world. Because profit margins are so thin, even a modest minority of consumers demanding sustainable products will force companies to change. It doesn't take much." 🍷



# Celebrating Five Years and **200** Graduates

# 2006



## *Willamette's MBA for Professionals*

**ON A** busy January day in 2006, painters, construction workers and Willamette MBA staff members put the finishing touches on the Willamette University Portland Center. With the paint still drying and the desks freshly assembled, the staff rushed to change their clothes before the students arrived for orientation.

Just seconds before the first students walked in the door, a banner reading “Welcome Inaugural MBA for Professionals Cohort” was attached to the reception desk. A line of eager staff and faculty were waiting to greet them. It was a momentous occasion — and the momentum from it hasn't stopped since.

After the program launched in Portland in January 2006,

it was expanded to Willamette University's Salem campus in September. Now, new cohorts start in Salem annually (in September) and semi-annually in Portland (September and January).

Tina Alexander, director of the MBA for Professionals, has seen the program flourish. “It's exciting to see the transformation that takes place from when students first inquire to when they finish,” she explains. “During and after the program, students report new jobs, new responsibilities and new successes at work.”

These life transitions aren't always work-related. Several of the students have gotten married or had children. A few expectant mothers even had their children in the midst



# 2011

of pursuing their degrees — jumping right back into classes when they were able.

“Graduates keep me up to speed on both new career changes and family additions,” adds Alexander. “It is an honor to share in their successes.”

The list of MBA for Professionals graduates includes students from all sectors and all industries, representing more than 150 different organizations. The diversity of experience in class is one of the major factors cited by students as adding to the program’s strength. Keeping cohorts small provides students with the opportunity to take various leadership roles.

The September 2011 MBA for Professionals commencement adds another group of graduates to the program’s

alumni community — pushing the total number of graduates to more than 200. In just five years, Willamette’s newest MBA program has not only impacted positively the lives of these students — it has also made an indelible mark in Oregon’s business community. 📌

—Russell Yost

*View a sample of the companies represented by MBA for Professionals graduates online: [willamette.edu/mba/professionals/success/employers](http://willamette.edu/mba/professionals/success/employers)*

*Note: Some graduates not pictured.*



SEPT. '11 PORTLAND



SEPT. '11 SALEM



JAN. '11 PORTLAND



SEPT. '10 SALEM



JAN. '10 PORTLAND



SEPT. '10 PORTLAND



**I**n the iconic final moments of Jefferson Smith's (played by Jimmy Stewart) impassioned filibuster before congress in the film *Mr. Smith Goes to Washington*, he reminds his colleagues of why it is important to fight for what is right, even the "lost causes."

*"...Because of just one, plain, simple rule: Love thy neighbor. And in this world today, full of hatred, a man who knows that one rule has a great trust. You know that rule, Mr. Paine, and I loved you for it, just as my father did. And you know that you fight for the lost causes harder than for any others ..."*

**I**N many ways, the Willamette University motto, *Not unto ourselves alone are we born*, reflects Smith's sentiment. Willamette graduates are encouraged to pursue meaningful work that positively impacts the world. They do well for themselves while doing good for others.

The Willamette MBA program's tri-sector emphasis, applying concepts that transcend the business, government and not-for-profit sectors, supports this overarching motto. Throughout the program and after graduation, Willamette MBA graduates seek opportunities where they can give back to the community while finding personal and

professional success.

Two recent MBA graduates, Jessica Balsam and Joshua Beatty (both MBA'09), are doing just that. Their professional lives have brought them to Washington, D.C., where they are taking on two of the world's biggest issues — education and the environment.

#### **CREATING ACCESS TO INTERNATIONAL EDUCATION**

It's no secret that we live in an increasingly global society. However, the Institute of International Education (IIE) has been fostering international exchange for more than 90 years through the provision of

education services, assisting students and scholars, as well as managing fellowships and scholarships. In fact, in 1921, IIE worked with the U.S. government to create the student visa category. Today, IIE helps more than 20,000 people access higher education and study abroad each year.

Building on more than six years studying and working in Asia, the Middle East and South America, Joshua Beatty now oversees IIE's six offices in Asia.

"My job allows me to work across cultures to improve the ability of the organization to further the mission of our program sponsors while

simultaneously increasing access to higher and international education," he explains.

The description of his newly created position at IIE "read like an MBA class list," but required him to utilize his previous experience working in not-for-profit management.

As a manager, he's tapped into knowledge from his finance and accounting classes at Willamette to not only understand the numbers, but effectively present them to executives in his organization.

"My MBA taught me to look at problems and to find solutions in a more process-oriented and data-driven fashion," he explains.





**GRADS AT THEIR GREATEST!**

*WILLAMETTE*  
**MBA<sub>s</sub>**  
go to  
**WASHINGTON**

JOSHUA  
**BEATTY**  
MBA'09

starring

JESSICA  
**BALSAM**  
MBA'09

written by RUSSELL YOST

A WILLAMETTE MBA ADVENTURE



JESSICA  
**BALSAM**  
MBA'09



**RENEWING THE NATION  
THROUGH RENEWABLE  
ENERGY**

After graduating with a degree in sociology, Jessica Balsam planned to continue on to earn her PhD. However, her life took her in a different direction — to Willamette to earn her MBA.

“I was (and still am) interested in making a difference in the world and Willamette gave me the tools to understand problems facing organizations today, the framework to work effectively with organizations and the ability to create high-quality results,” she explains.

Balsam is now the marketing and communications lead for the U.S. Department of Energy’s Weatherization and Intergovernmental Program. In 2009, her office received \$11.9 billion from the American Reinvestment and Recovery Act to support clean energy across the country. In her work she “gets to tell the success stories of this investment in clean energy technology.”

Like Beatty, Balsam’s position provides her with the opportunity to use her MBA skills learned at Willamette.

“I couldn’t do my job without my MBA,” she asserts. “Although the current focus of my job is on marketing and communications, I need to understand data sets to communicate messages to the public, know how to appropriately budget money to achieve program goals, work in teams, effectively lead groups of people to achieve measurable results and think strategically to maximize the impact of funds invested in the public sector.”

**LIVING “THE D.C.” LIFE**

In recent years, Willamette graduates have expressed a

renewed interest in living and working in Washington, D.C. post-MBA. Jobs in both the public and not-for-profit sectors require a broader understanding of management where recent graduates can flex their MBA muscles across functional and departmental lines.

It is an opportunity both Beatty and Balsam say contributes to the overall good.

“Come to D.C. to apply your MBA skills at improving the operations and efficiency of organizations,” Beatty explains. “You will help make donor and tax-payer dollars go further and make an impact on a national or even global level!”

“The District,” as it is often referred to, also offers a quality of life that supports its reputation as an international and cultural community.

“At its heart, D.C. is a political city and that vibe permeates much of its culture,” Balsam notes. “There is never a dull moment with the museums, restaurants and sports teams and there are truly people from every walk of life on the streets every day.”

Beatty agrees that in the city “you have the chance to meet





Darcy Winslow, director of the Sustainable Enterprise Certificate program, leads a discussion during the program's 2011 session. Winslow brings her extensive background as a sustainability manager at Nike to supplement the program's world-renown presenters.

"Rather than another course to enhance technical learning (e.g. 'green operational practices' or 'the technical aspects of carbon counting'), this was about effective problem solving through systems-thinking, expectant collaboration and approaching each task with my whole and present self."

—Holly Meyer, NW Natural

## From Theory Toward Action

*Sustainable Enterprise Certificate Integrates People, Planet and Profit*

In the beginning, there was 'profit,' and it was good. Then came 'planet.' We're taking strides in the right direction. But what about the final, oft-neglected, leg of the 'sustainability' stool: people?

**SURELY THERE'S** more to achieving this third of the solution than establishing living wages, safe working conditions, and fairness in the workplace.

So goes the logic of the Sustainable Enterprise Certificate (SEC), launched in 2009 to bolster the 'people' part of the triple bottom line. This isn't a program about 'the technical aspects of environmental conservation' or 'green operational practices;' this is about

fostering social well-being and collaboration to convert stakeholders into avid, vocal supporters. The

program aims to help participants gain a fresh perspective by answering a key question: "How can we achieve lasting, sustainable progress without the full engagement of the people involved and affected?"

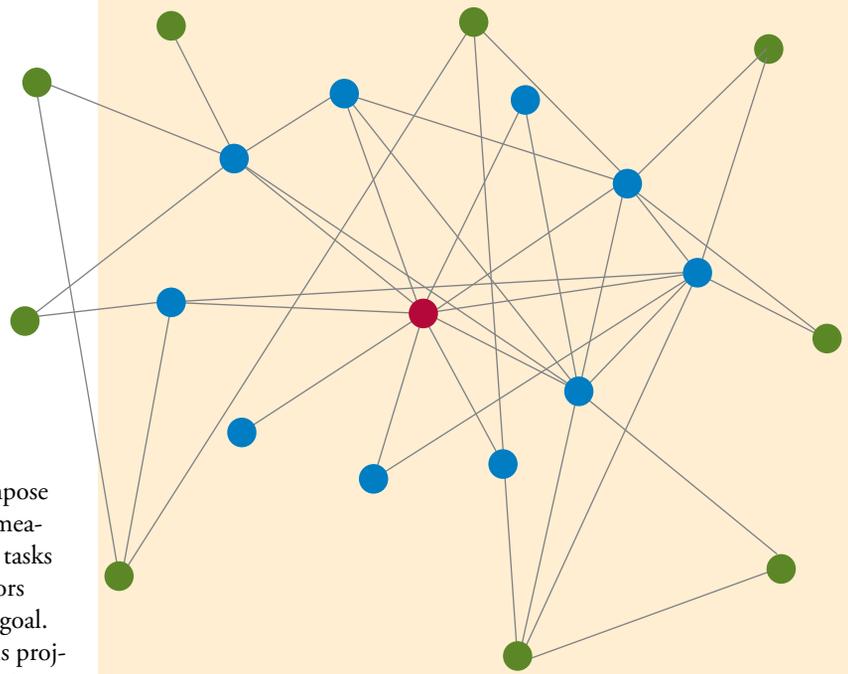
### **The fundamentals of a paradigm shift**

Participants begin with an

introduction to System Dynamics, the study of the underlying behavior patterns and systems responsible for everything from the price of organic apples at the store to traffic jams in Seattle. By taking a step back to map out the relevant causes and effects of a specific problem, participants acquire a more nuanced and comprehensive approach to developing enduring solutions. Participants are encouraged to look past the 'tip' of the iceberg-problem floating in plain view, and to peer down into the murky depths for root issues. In the context of an enterprise, this approach demands deep introspection and authentic conversation but promises the alignment and consensus that make sustained progress possible. Once participants explore system dynamics through a problem of their choice, they build on their learning with an examination of social equity.

Chilean biologist-turned-philosopher Humberto Maturana earned great renown for highlighting the importance of love in all collaborative situations.

EDC programs help organizations and individuals create value through understanding social networks and systems.



Not limited to the concept of romantic love, SEC participants learn about the power of love as ‘recognizing the other as legitimate.’ The reasoning: employees who feel heard at work tend to be more creative, loyal and engaged than those who feel marginalized. “Sustainable change can’t be driven,” declares Anne Murray Allen, director of the Executive Development Center. “We ought to dispense with the traditional, mechanistic language of ‘driving change,’ and embrace the potential of shared meaning as a way to achieve superior performance and expanded social well-being.” As the culmination of their experience, SEC participants apply this knowledge to their career paths.

certificate, they must compose a plan that identifies the measurable strategies, specific tasks and individual collaborators needed to complete their goal. For some participants, this project aligns with a challenge in the workplace. For others, the action plan serves as a springboard for a new project.

Although participants come from diverse professional backgrounds — from public utilities to not-for-profits to multinational corporations — they all emerge with the capacity and energy to effect change in their respective organizations. When they need support, inspiration or an objective perspective, they can always turn to the growing, close-knit community of SEC peers.



Anne Murray Allen  
Director, EDC

## Executive Development Center (EDC)

### CURRENT PROGRAMS:

- Utility Management Certificate Program
- Certificate in Public Management
- Sustainable Enterprise Certificate
- Certificate in Career Management and Coaching

For more information on upcoming programs offered through the Executive Development Center, visit [willamette.edu/mba/executive](http://willamette.edu/mba/executive) or call 503-370-6791.

Learn more about the Sustainable Enterprise Certificate at [willamette.edu/agsm/sustainability](http://willamette.edu/agsm/sustainability)



SEC program participants engage in a reflection exercise on the final day of the 2011 program at the Willamette University Portland Center.

### From conversation to collaboration

In the final session, participants review how the SEC’s principles have been applied in the real world and then tailor their final assignment to a current challenge. To receive their

With this platform of support, the hope is that our graduates will profit while helping the planet. 🌱

—Mike Russell



Students in the Design Thinking course strategize on how to bring their new product ideas into reality.

## Atkinson Annex Renovations Result in New Lab Space

**THE ATKINSON ANNEX**, the Willamette MBA's newest facility in Salem, houses classrooms, offices and the Executive Development Center. During the summer of 2011, the Annex underwent renovations to add new, interactive laboratory spaces to complement experiential learning programs in the early career and career change (ECCC) MBA programs.

**Student Investment Trading Floor** — The Annex now includes an executive-style boardroom where students participating in the Willamette MBA's investment fund course will be able to meet and discuss their ideas. The room is equipped with large display screens that monitor the markets and provide up-to-the-minute financial information.

**Rapid Prototyping Lab** — The ECCC MBA's "Design Thinking" course allows students to put their new product ideas into reality through the use of a three-dimensional printer.

**Collaboration Classroom** — One classroom of the annex is now reconfigured with large plasma screens

where students can work in teams to develop presentations, review data and present their findings.



## New Faculty

*The following faculty members are new to the Atkinson Graduate School of Management in Fall 2011:*



### **Kawika Pierson**

Assistant Professor of Accounting and Quantitative Methods  
PhD: *Massachusetts Institute of Technology*  
BSEE: *Northwestern University*

**Research Interests:** The application of feedback-rich, differential-equation modeling to research questions in accounting and finance. His thesis, titled "Profit Cycle Dynamics," consists of three essays, two focus on modeling profit cycles in the airline industry and the property-casualty insurance industry, while the third focuses on the detection and estimation of cyclical profits in the cross section of all reported firm earnings. His future research will leverage the power of large-scale computer models to address a wide array of open questions in management.



### **Ashley Nixon**

Assistant Professor of Human Resources Management and Organizational Behavior  
MA, PhD: *University of South Florida*  
BA: *University of Florida*

**Research Interests:** Occupational stress, workplace aggression, interpersonal conflict, employee well-being, workplace aggression measurement, interpersonal conflict measurement, emotional labor/emotion regulation, job satisfaction, occupational health and safety, healthcare management.



### **Tim Johnson**

Visiting Assistant Professor of Public Management and Public Policy  
MA, PhD: *Stanford University*  
BA: *University of Oregon*

**Research Interests:** How individuals use formal institutions, social norms, and their knowledge of behavioral regularities in order to achieve successful cooperation and strong organizational performance. He has published this research in journals across the social and behavioral sciences, including *Nature*, *Economics Letters*, *The Journal of Abnormal Psychology*, and *Political Psychology*.

## Strategy Consulting In India with Jay Desai

### JAY DESAI MBA'89

decided to pursue an MBA from the Atkinson School after completing a masters degree in molecular biology. If Desai had continued with his academic interest in biology, he might not have followed his heart back to India, where he felt there were fewer opportunities in the pure sciences.

"I interviewed with a few companies," Desai, founder and chief executive officer of Universal Consulting India Pvt. Ltd., said of his return home to a pre-liberalized India in 1989. "Recruiters always asked me, 'Why did you not stay and get a job in the U.S.?' 'You should not have come back.'"

But Desai went back with a sense of his own future in India.

"I felt that since I was an Indian, I should be living and

in Mumbai and, after five years, left to start up his own management consulting firm.

Desai had saved up just 50,000 Rupees, or about US\$1,000.

"That was not even enough to buy a laptop," he said. "I had to borrow money from my family to get that first computer."

"I had a view that there was a market for management consulting services for mid-sized companies," Desai said of those first few months. "I did what I wanted to do; I didn't worry about whether it would succeed or not."

"Seventeen years later, Universal Consulting is the largest home-grown strategy consulting firm in India with more than 60 staff, 270 clients, 700 cases conducted and offices in Mumbai and New Delhi," Desai said. The firm works with

contributing to India," Desai said. "I was aware that opportunities would be limited, but on the other hand, the social fabric of family and friends would be very strong." Management consulting was in its infancy, and the industry and the potential learning opportunities were attractive to Desai.

He immediately went to work for Andersen Consulting

multinational corporations and mid-to-large sized Indian companies in the life sciences, industrial products, capital goods, financial services and rural markets.

Desai said consulting is a profession that involves a lot of thinking, reading, analyzing and communicating.

"It's an extension of graduate school really," Desai said.



Desai also picked up a passion for teaching passed down by his professors at Willamette, especially Professor Mike Hand. This led Desai to make internal staff training a strong focus area in his firm.

"What struck me most about the atmosphere (at Willamette) was that it was a smaller school and there was more interaction with the professors — which was really good for me," Desai said.

Desai continues his academic pursuits, earning an Advanced Management Program (AMP) degree from the Harvard Business School. He is also on the verge of publishing a book on "accountability in India's public administration and governance systems."

"My research was triggered by the government's response

to the 2008 Mumbai terror attacks," Desai explains. "This has only served to enhance the argument for more accountability and integrity in India's public sector."

To Indian students studying in the western world, Desai's message is simple: "India is complicated and uncertain, but it is the future. I would urge them to come back to India, since the country requires all the talent it can get," Desai said. "Over the next 10 to 20 years, I don't think any other country can come close to providing the opportunities that a rapidly emerging India will." 📌

—*Timothy Akimoff*

# INVESTED BY AN ANGEL

WILLAMETTE MBAs EXPERIENCE  
ANGEL INVESTING FIRST HAND



Rob Wiltbank, associate professor of strategic management, knows a lot about angel investing. Through his research and teaching, he's attracted quite a bit of attention to the Willamette MBA program in recent years, especially through his experiential approach to learning.

**WILLAMETTE'S ANGEL INVESTING** course, now in its third year, is the only student-run angel investing class in the country. Students not only share ideas and insights about possible investment opportunities — they actually make investments with real money.

Students have two ways of experiencing entrepreneurship through the program. As angel investors, they have the opportunity to attend conferences throughout the region and invest right along with other private investors. They can also try their hand at creating a startup, developing the business plan and seeking their own funding. For the most part, their ideas have really taken off.

Together with Wade Brooks, the Atkinson School's director of development, Wiltbank has generated nearly half a million dollars for the Willamette MBA

Other schools ranked in the article include the University of Chicago, Stanford and Harvard.

The following month, *Oregon Business* magazine visited the investing course and again featured the Angel Fund.

Wiltbank and Brooks hope to continue to fundraise for the Angel Fund, growing it from \$300,000 to \$5 million. This would support it into perpetuity and enable the school to add additional programs and experiences for students — including travel to key angel conferences around the country. Added resources will help students better assess investment opportunities and track their progress over time. It will also help students make larger investments in the companies they deem successful.

Debra Ringold, dean of the Atkinson School, shares this vision. "It's an example of the

## *Inc.* magazine named Willamette's Angel Investing — New Ventures to Market course among the "top 10 entrepreneurship courses in the U.S."

Angel Fund, the source of capital for the angel investing course. It is "the most amazing teaching tool that I've ever seen," according to Brooks (who also serves as the fund's executive director).

The April edition of *Inc.* magazine agrees with Brooks' sentiment. Willamette's Angel Investing and New Ventures to Market course was named among the "top 10 entrepreneurship courses in the U.S." The lead photo in the magazine featured the Willamette class.

Atkinson School's commitment to experiential learning," she notes. "Our students are successful because they can take the knowledge they learn and put it into practice."

Yameen Ali MBA'11, a student in the 2011 course, agrees. "It puts a ... real-life situational pressure on us." 📌

—Russell Yost

*Rob Wiltbank brings his expertise on entrepreneurship into the classroom.*



## WILLAMETTE MBA ANGEL FUND CURRENT INVESTMENTS

Since the Angel Fund was established, students have invested in a number of successful organizations.

### **Open Sesame**

Connects learners and content providers directly in a marketplace where e-learning courses are easy to publish and connect to any learning management system (LMS).

### **Manzama**

Helps attorneys and practice groups search for information about their practice through electronic sources.

### **Zapproved**

Delivers online tools that manage accountability in business communications. Applications streamline processes without training or IT support.



Visit [willamette.edu/mbalangelfund](http://willamette.edu/mbalangelfund) to read about the program's current projects and learn how to get involved as an investor.

## Sustaining Success by Investing in the Willamette MBA Program

A few years ago, the O'Neill Student Investment Fund pioneered giving to experiential learning opportunities. The fund provides students with the opportunity to analyze companies and invest real money in the market. What are other ways you can get involved and support the Willamette MBA program?

**THE DEAN'S INITIATIVE FUND** serves as a crucial source of funding for student projects, career management programs, faculty research and scholarships. In the past few years projects like the Rapid Prototyping Lab, Career Management treks to cities across the country and international recruitment activities have been supported by the Dean's Initiative Fund. It is an opportunity to provide "real time" funding to some of the most groundbreaking projects at our school.

**THE WILLAMETTE MBA ANGEL FUND** (described in the previous story) supports the ongoing efforts of our experiential (and nationally ranked) entrepreneurship programs. Additional support for student programming and travel will help the fund remain one of the top new venture programs in the country.

**ADDITIONAL OPPORTUNITIES** for giving include support for the Atkinson Annual Fund, scholarships and the enhancement to student experiences. As enrollment for our MBA programs continue to grow and technology advances, we need to keep pace by providing a learning environment that is both innovative and inspiring. Funding new projects and student programs adds to the learning experience. In addition, student travel to conferences and events, including case competitions and tournaments, expand the Willamette MBA program's national visibility and create opportunities for networking and job searching.



Willamette MBA graduates are not "run of the mill" MBAs — they are earnest, cooperative and thoughtful. This is a result of the training they receive during their MBA experiences. Team oriented projects teach them how to be collaborative and understanding. Service to

non-profit and government clients foster a sense of civic engagement. Experiential courses apply what they learn to the real world. This unique environment is created and sustained through the continued support of our generous friends and donors.

Thank you in advance for your continued support of the Willamette MBA program. Please feel free to connect with me to learn more about initiatives described on this page and other unique opportunities to support our school and leave a legacy for the next generation of Willamette MBAs.

**Wade Brooks**

Director of Development  
Executive Director, Willamette MBA Angel Fund  
503-808-9901

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## FACTS ABOUT THE ATKINSON SCHOOL YOU MAY NOT KNOW...



### Setting Sail Since '75

The first Brownwater Regatta down the Mill Stream was held in April 1975 and covered by the *Oregon Statesman* (now *Statesman Journal*) newspaper. The paper described the races as “not one of the fastest courses negotiated but it was one of the wettest.”

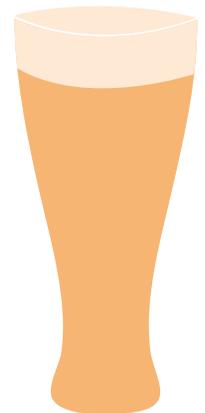
### Sock Hop

After December finals are complete, Willamette MBA staff members get together for a special lunch hour party where they don their favorite holiday socks (no shoes are required).



### Management on Tap

The Willamette University Portland Center is located in one of Portland’s first sustainably designed buildings. Originally part of the Blitz-Weinhard Brewery, the area is now one of Portland’s most popular neighborhoods.



### What a GAS

The first brochure published in 1974 for the Atkinson School (then the Graduate School of Administration, or GSA) misspelled the acronym as GAS.



# shhh!

At one time, the Atkinson School had its own library in the Mudd Building. The books were later moved to be housed along with Willamette University’s other collections in the Mark O. Hatfield Library.

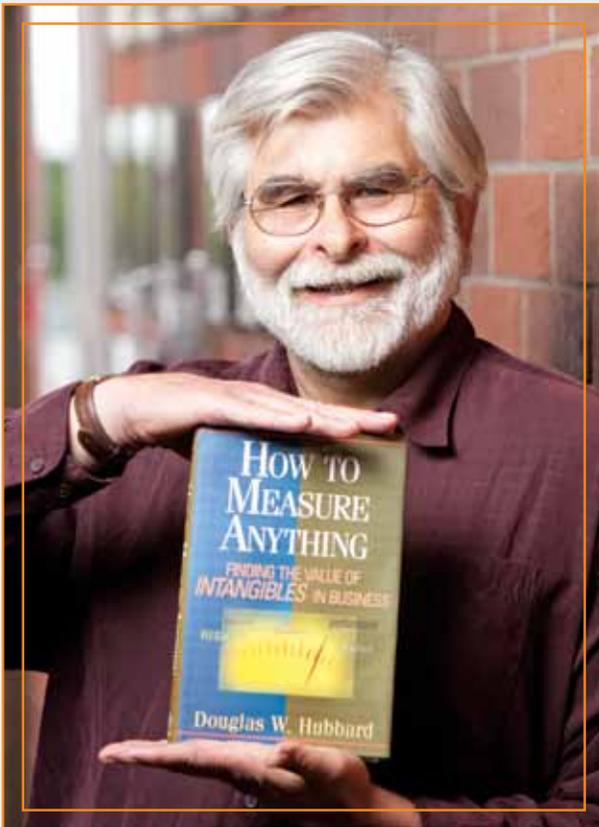
Willamette University is a diverse community that provides equal opportunity in employment, activities and its academic programs. The University shall not discriminate on the basis of race, color, religion, sex, national origin, disability, age, marital status, veteran status and sexual orientation.

*Directions* is the magazine of Willamette University’s Atkinson Graduate School of Management, published yearly. Its purpose is to share stories and campus conversations that help alumni, current students and friends of the Willamette MBA stay connected. The views presented in *Directions* do not necessarily reflect the opinions of the editors or the official policies and positions of Willamette University.

### Are You “Social” with the Willamette MBA?



- “Like” our page on Facebook (Willamette University MBA – Atkinson Graduate School of Management).
- Follow us on Twitter @WillametteMBA
- Join our group on LinkedIn (Willamette University MBA).



**FRED THOMPSON**

Grace and Elmer Goudy Professor of  
Public Policy and Management  
*How to Measure Anything*  
(second edition) by Douglas W. Hubbard

[willamette.edu/mba](http://willamette.edu/mba)

*Faculty's  
Recommended  
Reading*

**DEBRA RINGOLD**

Dean and JELD-WEN Professor  
of Free Enterprises  
*Decisions, Uncertainty, and the Brain:  
The Science of Neuroeconomics*  
by Paul W. Glimcher

**ELLIOT MALTZ**

Professor of Marketing  
*Predictably Irrational* by Dan Ariely

**ROBERT COUCH**

Assistant Professor of Finance  
*Fault Lines: How Hidden Fractures Still  
Threaten the World Economy*  
by Raghuram G. Rajan

**GEOFF GUILFOY**

Executive Professor  
*Start With Humility: Lessons from  
America's Quiet CEOs on How to  
Build Trust and Inspire Followers*  
by Merwyn Hayes and Michael Comer