Conference Call with Larry Goldstein

Founder and CEO of Campus Strategies, LLC

<http://www.campus-strategies.com/index.asp>

Monday, November 19, 2012

10:00 a.m.

Notes

 Present:  President Rick Hurley, Interim Provost Ian Newbould, UFC Representatives Angela Pitts and Jo Tyler, Chief of Staff Marty Wilder

* Mr. Goldstein emphasized that any assessment process must be approached holistically; not simply as a financial exercise.
* Each institution is unique—the process must be tailored to the particular institution.  No two studies are alike.
* Must look at everything within the institution, as an internal assessment process.  This means that the entire enterprise, including non-academic or academic support functions, be looked at as well as the academic side.  It should be conducted by representative groups within the institution and it must be your institution’s process.
* **Discussed the University of Hartford study**.  This was chaired by the Chief Financial Officer and the Chief Academic Officer, who were champions for the process.  Those appointed to the two task forces were individuals widely recognized as leaders with high integrity, trust, and those with the best interests of the institution—not their own self-interests.
* It will take serious conversations in order to gain acceptance on campus of any recommendations that might emerge from the process.
* The process represents a systematic way to direct resources and it is not driven by financial targets.
* Mr. Goldstein described **the process** being utilized by another institution. Their process has developed a system of quintiles for classifying programs (with “program” being defined broadly, both administrative and academic, of any size, including sub-program):
	+ (1) Maintenance with additional resources
	+ (2) Maintenance with the same resources
	+ (3) Maintenance with reduced resources
	+ (4) Transformation
	+ (5) Consider merger or elimination.
* Need to have a structured process and discipline in following the process.
* It is typical to find faculty reluctance or resistance, distrust, etc., especially until the process is understood and made clear.
* It is critical for faculty to understand the realities of the current and future financial environment and the increasing pressures on colleges and universities to adapt to an environment of static, or limited, resources.
* Activities that do not contribute to the institution’s success, as defined through this process, must be discontinued.  In other words, if something you’re doing is not helping to advance the interests of the institution, the resources supporting it should be redirected.
* The process must be transparent to those most affected.
* The only way to get at what’s really happening within the institution is through those who are most involved.
* Every institution has faculty and staff who are not contributing or have never contributed.  These must be identified in an objective way through data based decisions, not based upon likes/dislikes or personalities.

**Next steps:**

* Schedule a campus visit by Mr. Goldstein for informal interviews/discussions with campus leaders.
* Mr. Goldstein will send to Interim Provost Newbould materials describing the process and services.
* Typically, two task forces are established in a collaborative, process-oriented manner.  The consultant will then schedule a series of in-depth, day-long meetings with the academic task force, the non-academic task force, and a joint meeting of both task forces.
* Then the consultant leaves the scene and the task forces carry forth the work.
* Mr. Goldstein is available on November 29 or December 6 for a first campus visit.  In discussion with the UFC representatives, it was agreed that the **December 6** date is preferable.
* Dr. Newbould will work to establish a schedule for that date, to include meetings with faculty leadership and administrative leadership.  It was recommended that meetings include some representation from both groups within the meetings to help foster trust and open communication.