

CENTER TASK FORCE REPORT

THE FUTURE OF CENTERS AT THE UNIVERSITY OF IDAHO

REPORT SUBMITTED MARCH 2006

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Preface:

In November 2005 Provost Baker appointed a task force to rethink the structure and function of the UI's objectives at the UI Centers. The task force was asked to examine the authority and responsibility needed at each location to effectively plan, organize, lead and manage the centers; examine the budget system including flow of revenues to and from the centers; examine technology needs and resources applied to them; and develop 1-3 models. During the last four months the task force has met several times and has made trips to Boise, Coeur d'Alene/Post Falls, and Idaho Falls to review the programs and facilities at each of the center locations.

The attached report provides several recommendations regarding the future of the centers. The task force believes that there is an urgency to address a number of questions, challenges, and opportunities in regard to our statewide mission. The report provides several observations on the role of the centers and a list of recommended actions. Some of the actions will require further follow-up by several groups. A summary of recommended actions, those responsible for follow-up, and a timeline for action and implementation is included below. The task force recommends the development of the implementation plan of the recommendations by May, 2006 with full implementation by July 2007.

General Mission of Centers:

Consistent with the UI's Strategic Plan, the UI will develop centers in strategic locations in Idaho that allow the engagement with people, organizations and businesses to enhance teaching and learning, scholarly and creative activity, and outreach and engagement. The mission and values of each center are defined consistent with that of the University as well as the communities served by the centers.

Values brought by Centers:

1. **Student Access:** University Centers create accessibility for increasing numbers of students seeking courses, degrees, and ongoing professional development opportunities.
2. **Strategic Location:** University Centers are geographically located in population centers to expand access for the entire state population, and in regions where the research mission can be maximized.
3. **Visibility/Community Engagement:** University Centers promote statewide awareness of the University of Idaho leading to increased:
 - a. **Political Involvement.** An important source of funding for higher education comes from the state general account.
 - b. **Enrollment.** Enrollment in Moscow is fueled by the UI's reputation and "ownership" by potential students and their families. University Centers foster reputation and "ownership" in population centers.
 - c. **Alumni Support.** University Centers provide a local focal point for regional alumni activities and events.
 - d. **Development.** University Centers offer potential donors opportunities to engage with the university in efforts to connect the potential donor with university priorities and needs.
 - e. **Economic/Community Development:** University Centers increase the institution's impact on economic and community development.

- f. **Collaboration:** The centers provide a regional contact point with higher education institutions (public and private), research laboratories, and state and federal agencies to meet the university's and center's mission and strategic directions.

Guiding Principles for Centers:

1. The University will utilize a system-wide perspective in development and operation of the Centers
 - a. Define locational mission and strategic focus congruent within the University's strategic mission and strategic directions.
 - b. Develop an organizational structure that provides seamless participation in the development of university policy, budgets, and other decision-making processes.
 - c. Assure that the university and regional mission and strategic focus are delivered in the region served.
 - d. Develop instruction, research, outreach and services in collaboration with the appropriate administrative units. (This does not include cooperative extension in most regions, but it is expected that strong collaboration will be developed between the centers and the extension programs in each region.)
 - e. Assure that there are clear lines of communication, responsibility, and accountability among all entities within the system.
2. The University will have academic and service structures across the state that are responsive to the most critical community and constituent needs, assure system-wide quality, enable partnerships with other local institutions, and are consistent with center and institutional mission and strategic focus.
 - a. Engage in university strategic planning to maintain an overall mission and strategic focus based on the local assets, local needs, local authority (based on SBOE policy), and the University of Idaho's overall mission and strategic plan. (Not all centers are expected to be the same.)
 - b. Develop a structure that allows placement of leadership, faculty, and staff for colleges, departments, schools, and programs at strategic locations statewide.
 - c. Increase information dissemination and establish clear lines of authority and responsibility to provide prompt, high quality service to students and other constituencies.
 - d. Appoint (invitation from President White) an advisory group for each center to assess and project regional needs and advise the university and advocate for strategic initiatives.
3. All teaching, research, service, outreach and extension activities will be of comparable quality at all locations
 - a. Degrees at all locations will be of equal quality with the expectation of comparable quality in course offerings, faculty qualifications, admission, and retention standards.
 - b. Faculty will be appointed according to university-wide standards.
 - c. Comparable facilities, infrastructure, and faculty and staff support will be provided throughout the system.
 - d. The Provost in cooperation with College Deans and Center Executives will be responsible for assuring program quality, planning and coordination across the

university system. All programs will be reviewed on a regular basis to assure quality.

4. Be a conscientious steward of all of the university's human, financial, capital, and intellectual resources.
 - a. Support and assist in mentoring a high quality faculty and staff.
 - b. Develop organizational structures, operating policies, and procedures that clarify operating lines and eliminate unnecessary bureaucracy for administrators, faculty, staff and students.
 - c. Design and implement effective management and budgeting systems which align incentives and allocations with strategic priorities
 - d. Plan, develop, manage, and maintain buildings, grounds, and physical infrastructure of the centers.
 - e. Centralize programs and services where economies of scale can be achieved (e.g. Registrar, Student Services, Library, Personnel Services, IT, system wide site licenses, etc.) and operate consistent with university standards when decentralized.
 - f. Use the unique resources and capabilities of the individual communities for the benefit of the whole university. For example, urban centers provide the opportunity for enhanced internships and the Idaho National Laboratory (INL) provides a unique opportunity for research collaboration.

Governance and Administration of Centers:

1. Overall organization
 - a. Center Dean title should be changed to better reflect responsibilities and authorities, external and internal audience perceptions, and internal working relationships. Potential titles could include Vice Provost and Center Executive Officer (CEO) for (Location), Associate Vice Provost and Center Executive Officer for (Location), Associate Vice President and Center Executive Officer for (Location), or as the President/Provost determine.
 - b. Center names should be changed to UI Coeur d'Alene, UI Boise, and UI Idaho Falls. (The exact relationship of the UI Research Park in Post Falls with UI Coeur d'Alene and UI Northern Idaho will need further clarification.)
 - c. Status of UI operations in Twin Falls should be clarified and resolved.
 - d. Position reports to Provost
 - e. Programmatic and Fiscal Responsibilities at the Centers
 - i. Ultimate programmatic and fiscal responsibility for all programs rests with the Provost.
 - ii. The attached model (Figure 1) describes the recommended relationship among the Provost, the Center Executive and the Deans in programmatic and fiscal responsibilities.
2. The University will be represented administratively in each community by the Center Executive, acting on behalf of the President and Provost.
3. Departments and units will be system-wide, with appointment, tenure and promotion recommendations, annual review, and changes in employee compensation for faculty completed by the Department Chair/Head and College Dean with formal input from the Center Executive in all of these processes.

4. Departments and units will be system-wide, with appointment, position descriptions and annual review for staff completed by the appropriate administrator with formal input from the Center Executive in all processes.
5. The Center Executives will have representation on the President's Cabinet and the Provost's Council. (For the remainder of the document it is assumed that the center executives are represented on the Provost's Council.)
6. The university should establish a clear policy on how the UI will collaborate with and differentiate itself from the other institutions in each region of the state.
7. The university should clearly articulate the UI's role on local operating committees and the implementation of SBOE plans and policies consistent with the UI's Strategic Plan and the mission and strategic focus of each location. The UI should pick alliances wisely to collaborate as possible, but avoid situations where the interests of UI are compromised or where the cost is more than the benefit.
8. Regular training and updating of administrative systems should be done statewide.
9. The task force saw incredible strengths and opportunities in each of the three locations and saw the pressure and the dangers of being all things to all people. Thus it is essential that the locational mission and strategic focus be developed for each center that is congruent with the University's strategic mission and strategic directions.

Recommended Actions:

1. **Make a decision on title of center executive and overall administrative structure and develop position descriptions to reflect the role and responsibilities of the center executive. (President/Provost)**
2. **Develop an overall mission and focus statement for each center (including the clarification and resolution of the UI's role in Twin Falls) as well as an overall business plan for each center. This statement should reflect the collaboration with other institutions in the region. (Provost's Council)**
3. **Adopt a plan for the centers that establishes the responsibility for funding and decision making in each functional area. The task force has developed a matrix of the major areas needed for development of this plan. (Provost's Council; Budget Office)**
4. **Develop long range plan for providing training and updating of administrative systems. (All service offices; Centers)**
5. **Appoint a work group to operationally define lines of authority, communication, and responsibility between centers and administrative units. This group should also identify the major administrative and management positions to be located at each center. (Provost to appoint)**
6. **Develop local, regional and statewide impact data to inform the public of the university's performance and contribution. (Institutional Research and Assessment; UI Extension; Registrar's Office; UI Marketing)**

Academic Programs:

1. Develop a system for assessment and identification of needs, capacity, and market that is ongoing and is routinely used to determine needs in teaching and learning, scholarly and creative activity, and outreach and engagement in each center location.

2. Develop and fund programs for each region that are based on the overall strategic mission and focus of each center, are responsive to well-defined local needs, and result from a collaborative approach between the center and the academic units.
3. Allocate funds to meet defined strategic needs for programs and infrastructure
4. Consider centralizing off-campus fees and allocating funds based on the defined strategic program needs at each location. (Must consider that many units are stimulated to develop programs at off-campus locations since the off-campus fees provide discretionary funding that can be used to provide support for travel, professional development and salary supplementation for faculty and staff. The historical generation of the fees, the impact on program delivery statewide, and strategic investments should be considered in determining the allocations.)
5. Develop reporting and analysis methods on credits, student enrollments and other measures using consistent tools for the system that better reflect the actual impact at all locations.
6. Organize professional and continuing education programs (credit; noncredit; conferences; etc.) across disciplines to successfully compete and “brand” with greater responsiveness at multiple locations. (Systems developed must minimize potential internal competition that can impede productivity and effective service to constituents.)
7. Develop a campus wide infrastructure and business plan to deliver/market distance-delivered and web-based courses and programs.

Recommended Actions:

1. **Refine, develop, and integrate enhanced analysis/reporting methods for delivery of programs statewide. (Registrar’s Office; Institutional Research and Assessment)**
2. **Develop a comprehensive system of needs assessment and program review including a review of the role of center positions in the process of needs assessment. (Institutional Research and Assessment; Centers)**
3. **Develop list of academic programs to be delivered at each center for next 1-5 years. (Provost’s Council)**
4. **Based on the list of academic programs identified in item #3, develop a funding approach including consideration of using a centralized approach to the use and distribution of off-campus fees and providing resources to start and/or bridge program delivery. (Provost’s Council; Budget Office)**
5. **Develop a campus-wide infrastructure and business plan to deliver distance-delivered and web-based courses and programs (Provost's Council, ITS, Special Lab and Course Fee Committee, and Educational Outreach. (Provost’s Council; ITS; Special Lab and Course Fee Committee)**
6. **Develop recommended structure and policies for professional and continuing education programs (credit; noncredit; conferences; etc.) offered at each location to align with the UI Strategic Plan. (Registrar’s Office; Provost’s Council; Centers)**
7. **Develop a sustainable fiscal plan to offer distance delivered programs and services utilizing a combination of appropriate delivery tools, e.g., the Web, compressed video, DVDs, web casting. (Provost's Council)**

Student Affairs:

1. Develop an overall plan for recruitment of undergraduate and graduate students for the local center and the university.
2. Provide access to appropriate student services at each center.
3. Build relationships for students at all centers to develop more engaged and active alumni/donors (“Vandal Spirit”).

Recommended Actions:

1. **Review New Student Services at each center to determine the role and responsibilities in recruitment at each of the centers and across the state. (Provost’s Council; Centers; New Student Services; Associate Deans group)**
2. **Carefully analyze the need for student services at each center and the infrastructure and/or partnerships needed to provide services. (Student Services; Centers)**
3. **Develop plan to increase Vandal Spirit of students and alumni at each center. (Advancement; Alumni Relations; Centers)**

Business Affairs

1. Assure efficiency and effectiveness in operation of all budgeting and personnel support for each center.
2. Streamline administrative processing to make it more timely and efficient. (Human Resources, Sponsored Programs, etc.)

Recommended Actions:

1. **Develop a plan for the structure and funding of business operations at each center. (Business and Accounting; Centers; Budget Office; HR)**
2. **Update the Administrative Procedures Manual (maintain electronically with version control) and other web information so that it is useful to all employees regardless of location and provide training at all locations for policies and procedures. (Finance and Administration)**
3. **Review the overall structure for administrative processing to ensure it is timely and efficient and meets the needs of the university. (Finance and Administration)**

Information Technology:

1. Develop an effective method and plan for delivery of IT, IT support and other technological expertise needed locally.
2. Develop and fund a quality distance education system, including compressed video and web delivery.

Recommended Actions:

1. **Develop an overall plan for IT for the university and each of the centers including technological expertise needed locally, reporting lines and relationships, and problem solving roles and relationships. (ITS; Centers)**
2. **Develop a plan for the structure and funding of IT services including adequate bandwidth, compressed video, web delivery, etc. (Centers; ITS; University Outreach compressed video network; Educational Outreach.)**

University Advancement

1. Develop a plan for actively involving all locations in support of the university's overall marketing and development plan. University Advancement including communication and marketing, development, and alumni relations should lead this effort.

Recommended Actions:

1. **Provide support for advancement in each region with responsibility for the local initiatives. (Advancement; Centers)**
2. **Develop a coherent marketing, alumni and development plan for the university and all locations. (Advancement; Centers; Provost's Council)**

Funding

1. Assess funding needs and allocate funds and resources to the centers and academic programs for support of the programs at the centers.
 - a. Fund faculty positions in the appropriate college.
 - b. Fund support positions in center and in student services, financial, IT, facilities and other units as appropriate.
 - c. Consider centralizing off-campus fees and allocating these funds as a part of the regular UI budget.
2. Identify critical infrastructure needs at each location and through a combination of reallocated existing funding, student fees and new state and extramural grant funding, fund the **infrastructure** appropriate at each center including funding so that colleges/departments/institutes are not charged for space and/or services.
3. Develop performance-based funding models that encourage, support and sustain teaching and learning, scholarly and creative activity, and outreach and engagement growth, e.g. formula for F&A return for multi-locations; sale/rental of property and facilities (UIRP); ongoing professional education seminars/conferences; and intellectual property licensing royalties.

Recommended Actions:

1. **Based on the identified mission and strategic focus, allocate the resources for essential program and operational costs at the centers and have the institutional will, discipline, heart, and backbone to make it happen. (Provost/President)**
 - a. **Develop a recommended use and distribution of off-campus fees (See above). (Budget Office; Provost's Council)**
 - b. **Develop a funding plan using F& A, occupancy costs and other funding sources to provide funding for space at all centers and thus reduce or eliminate the need for programs to pay for space. (Budget Office; Research Office)**
 - c. **Develop plan for allocating portion of F& A and Royalty funding to centers where work originates. (Budget Office; Research Office)**

Table 1. Recommended Action and Timeline

Actions Recommended	Office Responsible	Groups Involved	Timeline to complete
Governance and Administration			
1. Make a decision on title of center executive and overall administrative structure and develop position descriptions to reflect the role and responsibilities of the center executive.	Provost	President/Provost	May, 2006
2. Develop an overall mission and focus statement for each center as well as an overall business plan for each center.	Provost	Provost's Council	July, 2006
3. Adopt a plan for the centers that establishes the responsibility for funding and decision making in each functional area.	Provost	Provost's Council	July, 2006
4. Develop long range plan for providing training and updating of administrative systems.	Provost	All service offices; Centers	July, 2006
5. Appoint a work group to operationally define lines of authority, communication, and responsibility between centers and administrative units.	Provost	Provost to appoint	July, 2006
6. Develop local, regional and statewide impact data to inform the public of the university's performance and contribution.	IR&A Director	IR&A; UI Extension; Registrar's Office	December, 2006
Academic Affairs			
1. Refine, develop, and integrate enhanced analysis/reporting methods for delivery of programs statewide.	Registrar	Registrar's Office; IR&A	December, 2006
2. Develop a comprehensive system of needs assessment and program review.	IR&A	IR&A	December, 2006
3. Develop list of academic programs to be delivered at each center for next 1-5 years	Provost	Provost's Council	December, 2006
4. Based on the list of academic programs identified in item #3, develop a funding approach including consideration of using a centralized approach to the use and distribution of off-campus fees and providing resources to start and/or bridge program delivery.	Provost	Provost's Council; Budget Office	December, 2006

5. Develop recommended system and business plan for delivery of web based courses	Provost	Provost's Council; ITS; Special Lab and Course Fee Committee	December, 2006
6. Develop recommended structure and policies for professional and continuing education programs offered at each location to align with the UI Strategic Plan.	Provost	Registrar's Office; Provost's Council; Centers	December, 2006
7. Develop a sustainable fiscal plan to deliver educational outreach programs and services through distributed learning tools and delivery techniques, e.g. on-line, compressed video, DVD's, web casting.	Provost	Provost's Council	December, 2006
Student Services			
1. Review New Student Services at each center to determine the role and responsibilities in recruitment at each of the centers and across the state.	New Student Services	Provost's Council; Centers; New Student Services; Assoc. Deans	December, 2006
2. Carefully analyze the need for student services at each center and the infrastructure and/or partnerships needed to provide services.	Dean of Students	Student Services; Centers	December, 2006
3. Develop plan to increase Vandal Spirit of students and alumni at each center.	Advancement	Advancement; Alumni Relations; Centers	December, 2006
Business Affairs			
1. Develop a plan for the structure and funding of business operations at each center	F & A	Business & Accounting; Centers; Budget Office; Human Resources	December, 2006
2. Update the Administrative Procedures Manual so that it is useful to all employees regardless of location and provide training at all locations for policies and procedures.	F&A	Finance and Administration	December, 2006
3. Review the overall structure for administrative processing to ensure it is timely and efficient and meets the needs of the university.	F&A	Finance and Administration	December, 2006
Information Technology			
1. Develop an overall plan for IT for the university and each of the centers.	Information Technology Services Director	Information Technology Services; Centers	December, 2006

2. Develop a plan for the structure and funding of IT services including adequate bandwidth, compressed video, web delivery, etc.	ITS Director	Centers; ITS; Compressed Video Administration; Educational Outreach	December, 2006
Advancement			
1. Provide support for advancement in each region with responsibility for the local initiatives.	Advancement	Advancement; Centers	July, 2006
2. Develop a coherent marketing, alumni and development plan for the university and all locations.	Advancement	Advancement; Centers; Provost's Council	December, 2006
Funding			
1. Based on the identified mission and strategic focus, allocate the resources for essential program and operational costs at the centers and have the institutional will, discipline, heart, and backbone to make it happen.	Provost	Provost/President	December, 2006
1a. Develop a recommended use and distribution of off-campus fees (See above).	Provost	Budget Office; Provost's Council	December, 2006
1b. Develop a funding plan using F& A, occupancy costs and other funding sources to provide funding for space at all centers and thus reduce or eliminate the need for programs to pay for space.	F & A; Budget Office	Budget Office; Research Office	December, 2006
1c. Develop plan for allocating portion of F& A and Royalty funding to centers where work originates.	Research	Budget Office; Research Office	December, 2006

Figure 1. Programmatic and Fiscal Responsibilities. Programmatic responsibilities are represented by a solid line and fiscal lines are represented by the dashed line. Administrative and management functions are coordinated locally.

