

## Comments/Questions From Leadership Summit Small Group Session Two

Comments and questions from the small group discussions about the Activities and Timeline process are stated below with answers to the questions in bold print. The comments were considered for the revision of the Activities and Timeline sent to each unit on 10/3/03. Thank you for your assistance and support.

### General Comments

1. Periodic prompting by email to remind us of report deadlines *Thanks, we are including this on our schedules and with the revised Activities and Timeline document that will be published on the web, 10/3/03 and sent electronically to all units.*
2. It is a challenge to assemble faculty, staff/students to respond because of fall schedules
3. All reports submitted to deans at same time as e-copy due – would like time to discuss with deans prior to public submission
4. How will comments from individuals be encouraged on the web without individual unit checking on it? *Comments that are published on the web will not be identified by origin, rather by topic. Comments from individuals will come via email - [chartingthefuture@unco.edu](mailto:chartingthefuture@unco.edu). The origin of comments received will be considered confidential.*
5. Website is an outlet; easier for some units than others to come to unified perspective. Headers need to bring their units together.
6. Once posted on the web, how are reasons dialogued – web/paper etc.? *The web page will be used and if you wish to have paper, you can download the section.*
7. Will the web show the origin of the comment? *No, the web will not show origin of comment, but will identify such things as comments from the Leadership Summit.* Will anonymous comments be an option? *We encourage comments to include a name so that we can communicate with the person if needed; however, we will read all comments that are received.*
8. Create searching for keywords on website, i.e., find all comments that include the word “housing” *This will be developed in early October, thanks for the suggestion*
9. Use list serve process to improve communication
10. Focus discussions on future
11. Maybe misunderstanding of context of comments on the web – certain comments may be misinterpreted
12. Security of data and comments
13. Ambitious timeline
14. Does timeline allow for meaningful input from constituents within unit? Not a 1 or 2 hour meeting! Allow units flexibility to schedule “retreats” *We hope that the time allows units flexibility to gather the input and the time to meet, etc. Currently the timeline permits approximately 7 weeks.*
15. November-March – sufficient time? *To be able to work within the parameters of the annual budget process, the time for report review and recommendations was determined to be adequate*
16. Highlight one month to write report! *The new timeline being developed will allow 7 weeks to prepare the report. (10/3/03 to 11/26/03)*
17. How to avoid the feeling of pressure/stress, adding to faculty/staff/student burdens? *Stress/pressure is a natural outcome of any planning process and we do hope*

- leadership of units can arrange their schedules and planning to avoid as much pressure as they can.*
18. Concern re: retaliation if ideas don't "sit well" with the person you report to *If you fear that your ideas would lead to retaliation, you may share your ideas via email at [chartingthefuture@unco.edu](mailto:chartingthefuture@unco.edu). Ideas received via email will be considered by the Design Team, but the author will not be identified.*
  19. List of individuals who can facilitate discussions within units *The Design team members will be available as a resource; however, the idea of an outside facilitator for unit discussions is a good one.*
  20. Should person to whom the unit reports, e.g., dean, VP, Asst. VP, be present at meetings? How would this influence openness of discussion? *We do not believe the next level administrator (Dean, VP, AVP) should be present at meetings. We want the faculty, staff, and students within a unit to feel free to discuss openly. The next level administrator will receive the report and will have time to meet with a unit for clarification; and then provide their comments and recommendations to the Design Team.*
  21. Doesn't allow enough time or opportunity for student input. How to collect or use student input, especially on future? *Student governing groups will prepare reports and will implement meetings for student input. We encourage departments, programs and services to include students in their meetings and discussions.*
  22. How will students be encouraged? (*see above*)
  23. How to involve students? (*see above*)
  24. Extent of student involvement in data collection report writing *We encourage student involvement in all aspects of the report preparation. A unit could establish a "suggestion box" and encourage students to use it. These suggestions could be part of the unit report or sent to [chartingthefuture@unco.edu](mailto:chartingthefuture@unco.edu)*
  25. How do we get everyone together? Decide and set meetings. *As you schedule meetings, select a time when most people can be present and/or provide a means to communicate with all, e.g. email, conference calls, suggestion or comment box in unit office to encourage involvement and comment.*
  26. Formal and informal meetings are important.
  27. How do timelines effect groups that only meet periodically (i.e. General Ed Council) *The Councils may need to call a special meeting to discuss and prepare a report.*
  28. Getting members of unit to buy into process – decrease suspicion – reduce "what about me" perspective (may be bigger issue for non-academic units) *The process is designed to encourage participation with all campus personnel and students. If members of units do not want to participate that is their choice; however they will lose an opportunity to state their ideas and be heard.*
  29. Gathering input from alumni – does timeframe allow – alumni surveys provide ideas for future directions *There is a 7 week period for preparing the report, in that time, alumni can be included in meetings, collect information via email, telephone, and/or inform alumni about the Website and encourage their involvement and comment via email.*
  30. Hear more about constituencies (students) who do we include externally as well? *The selection of external constituents is a choice each unit has, ideas include alumni, community members who are recipients of services, professional organizations, donors, etc.*
  31. Looking outside to whom you serve in relation to dreaming. Also, checking with alumni.
  32. Time for external constituents to respond? How far do we spread out in relation to service providers? *The decision re external constituents and service providers is dependent on the unit or council.*

33. Concerns on getting feedback from other constituencies necessary to develop report board on timeline given.
34. Within time frame – do we stop ongoing activities? What happens to our momentum?  
*No, you should not stop your current activities, some may need to be postponed and a unit can make decisions on priorities of activities and how best to arrange scheduling, etc.* Different units – different constraints/flexibility within time frame. *The timelines that are established in the final document to be released in October 3 will be final, it is necessary to be fair to all units and implement the same deadlines.*
35. Reduction of research output required during this planning time.
36. Possible 2 day no classes -- work on report by all units –encouraged by top administrators
37. Instead of canceling classes, have students use classes on a given set of days to generate innovative ideas to help “save resources.” (Faculty facilitations and reporters on student inputs).
38. Need time to meet with other units in order to provide integrated vision. *If you want to provide an integrated vision, please do so; however we are not requesting that the vision, dream, and suggestions that come forth be integrated. The Design Team will develop an integrated plan for the University.*
39. Give different credit hour production values to grad and under grad courses. *The SCH values are determined by CCHE, not a UNC policy*
40. If part of the plan includes a RIF, this may extend the timeline due to the 60-day request.
41. How does the timeline allow for a RIF? *If as a result of the process it is determined that the need for a reduction of force becomes evident, the President will submit a report to the Faculty Senate and the Joint Retrenchment Committee to request a JRC review. We believe that the timeline allows for the recommendation to meet the time frame established in the Board of Trustees Manual.*
42. Involvement JRC needs to be in timeline, e.g., when cuts may be made
43. Need time to get ideas from other universities- innovative changes during cutbacks. *The Charting the Future planning process is specific to UNC and need not be influenced by the activities or plans from other universities. To our knowledge, other higher education institutions are not engaging in a comprehensive planning process.*
44. Need formal process to get “outside “ ideas from other schools.
45. Need to apply standard research methodology (by unit)
  - 1) Secondary Research- how are plans doing this year in the USA
  - 2) Experience Survey- Talk to “knowledgeable people” in the USA
46. Focus interviews with people beside us.
47. Institutional Resources need to be allocated to this effort (see above) if this is as important as it appears to be.
48. Concern of doing more with less, especially with already feeling pressure and stress. How can we address these types of issues? *A major goal for the comprehensive planning process is to identify financial resources that may be available for us to retain our quality educational programs.*
49. Question- do governance boards write reports (as listed on p.6)? Type of format report? *Yes, governance boards are to prepare a report. The board should use the same format, Past, Present Descriptors and Future. The questions listed may or may not be appropriate to the board or council, the council has the freedom to prepare the report using only those questions that are appropriate for their mission, or they can develop other topics or questions that will help tell “their story.” We are particularly interested in the dreams, ideas, etc. to be included in “Future” sections from our governing councils*
50. Concern-philosophical concern regarding basic liberal arts knowledge vs. preparing students for professional careers.

51. Critical reports and trying to juggle timelines with other reports
52. Is this a flowing time change, can it change? ***There will be changes in the activities/timeline that were discussed at the Summit; however the final document posted no later than 10/03/03, will display dates that cannot change.***
53. What will the final report look like from the design team? ***At this time we do not know what the report will look like. The report format and content will emerge as we discuss the reports and design a chart for UNC's future.***
54. Request designation/identification of current design team members for representation of units/departments ***Please use the Leadership Summit attendees listing. It was organized to highlight the Design Team members and the units/departments that report to that person. Also, the Website has a listing of Design Team members and the units for which each member is responsible.***
55. Regarding the Design Team: would they consider an academic leader? The current makeup only includes one academic. ***The Provost is the chief academic officer of the University. The Design Team has a total of four persons who have extensive years of experience as faculty and academic leaders – Allen Huang, Vinnie Scalia, Tom Gavin, and Ellie Gilfoyle. Also, Fran Schoneck is currently teaching a class and has taught courses in the past.***
56. Concern about design team makeup – faculty, student, staff – request representation on design team Expectation is this process will not impact budget next year, but the year after ***The Design Team is a decision making group, not a representative one. Administrators are charged with making decision. We have an effective shared governance system with representation; we believe this process honors shared governance and promotes representation from the total campus.***
57. Inclusion of faculty government. ***The Faculty Senate and its Councils will be submitting reports to the Design Team. Also these official bodies attend the Leadership Summit meetings.***
58. Will the UNC community have available to it the guidelines the Design Team will follow to develop its action plans? ***Yes, the Charting The Future published “Guiding Principles” provide a sound foundation for operations and actions of the Design Team. In addition, the ground rules and/or specific guidelines for reviewing reports and developing recommendations are being discussed and when finalized, will be published on the Web.***
59. Why reports to design team at same time as deans? Deans first – adds creative thinking – then design team ***The Design Team members want to start reading reports as soon as possible. There will be approximately 125 reports and to provide each report with careful review and study, we need to have them as soon as they are available. Also, Deans will have time to review the reports and if necessary meet with the units for clarification. Deans, etc. will prepare a report for their office. They are charged to provide comments and recommendations about their specific units.***
60. Possibly include implementation in timeline – when notification of cuts, etc., will take place
61. Perhaps combine units for synthesized reports
62. Is Foundation part of planning process? (Source of revenue) ***The Foundation is not a legal unit within UNC and therefore UNC cannot direct its functions. Certainly the Foundation will want to know funding priorities that should emerge from the planning process. It will be important for UNC to communicate with the Foundation about the Charting the Future process and the outcomes, including funding priorities.***
63. Secondary education should be represented across unit function
64. Comments – submitting to administration to clarify process as reports are developed
65. Encourage staff and representative groups to get involved in the comment process

66. Educate Residence Hall staff on this process so they can try to involve the students.
67. How do we balance all current commitments and writing this report while maintaining quality and service to students? ***The first priority is to provide educational experiences to our students; however, an important priority is participation with the planning process. We believe that this process, in the long term, will enhance the quality of our offerings. We suggest that all units review activities and postpone those that are of less importance than the planning activities.***
68. Program review deferred, ***The reports for Charting the Future will be considered the Program Reviews for this year. NCA ? NCA report will continue to be developed; Charting the Future plans will be part of the report.*** and others ongoing
69. Cross-departmental proposals – e.g., to merge
  - 1) Need mechanism for this
70. Extend program reviews to 8 years? ***This may be an idea you can include with future recommendations; currently CCHE requires program reviews every 5 years. Reduce reporting requirements, redundancy Program reviews for this year will be the reports prepared for Charting the Future.***
71. What does this replace? ***The Charting the Future reports replace the current Program Review process for 2003-2004***
72. Unit reports remain separate from comments? ***Each unit will complete a report and also individuals within the unit can submit their comments via email to chartingthefuture@unco.edu***
73. May have follow-up addendum? ***After a unit submits a report, any additional comments or ideas can be sent via the comment section on the web or by email to chartingthefuture@unco.edu***
74. Even though these are drafts, units need to start gathering info and input as if the drafts will largely remain the same
75. You may need data for last 5-6 years
76. Timeline OK for smaller units
77. Report that goes to the Board will not have all the details. These details must be communicated back to the units. ***All reports, comments, etc. will be posted on our Website.***
78. Minority reports within units or consensus or democratic process? ***We want one unit report. Each unit can determine its ground rules, i.e. consensus or democratic process. Minority reports can be submitted via email to chartingthefuture@unco.edu***
79. Opportunity for rejoinder to Deans' suggestions Where would this go? ***Should a unit or individuals want to respond to the Deans' suggestions, they may do so via email at [chartingthefuture@unco.edu](mailto:chartingthefuture@unco.edu)***
80. How broad should the scope be in soliciting feedback/data? ***Each unit should determine the parameters and/or scope to solicit feedback. Keep in mind that what is submitted must be within the 10-page limit. Data as appendices can be additional; but must be relevant to the text and referenced in the text.***
81. Not enough time for future planning
82. On-going data gathering throughout planning process
83. Constrains have not been specified to help understand timeline necessity
84. Repeated concerns from units that have multiple constituents (internal and external) (specific constituents)
85. Political and emotion-laden challenges.
86. With more time, would we use it effectively? ***We believe there is adequate time to prepare a quality report, the new deadline is 11/26/03.***
87. Provide more time for feedback after reports are submitted.

88. How to balance desires to involve broad constituency and still meet suggested time frame.
89. Opinion varied as to whether more time is advisable.
90. Adequate opportunity to voice concerns from ALL Trust
91. Lives of community can anyone comment? ***Yes, anyone can comment, the information is on the Web and open to the public***
92. 6 weeks to write, 6 months to comment? ***The timeframe for report preparation is 7 weeks, time is needed to read all reports, discuss the reports and determine next steps. Within the time frame (November 26 to March 5, 2004) there will be several meeting schedules and requests for comments via the Web. On March 5 a PROPOSED plan will be submitted and time given for comment on that plan. To activate a process that values involvement of the campus community requires time for public comment and discussion.***
93. Adequate input collaborated 6 weeks.
94. Relationship between budget and plan.
95. Start Now
96. Timing with regard to faculty government, (program review)
97. Find ways to lower stress

#### **Comments for specific activities/dates**

1. Item 13: Comments re: proposed report format posted on web – based on today’s session ***The comments received at the Leadership Summit will be posted on the Web. Additional comments received will be summarized and posted as they are received.***
2. 15<sup>th</sup>? Final format (Oct. 3<sup>rd</sup>) ***We will send the final format to each unit, electronically on 10/3.***
3. #16. Are reports pre-determined, or by request? ***A paper copy of productivity and expenditure data will be sent to units from Institutional Research and Finance/Administration.***
4. 17<sup>th</sup>? Revised format (Oct 13<sup>th</sup>) ***We have established 10/3 as the goal for Web publication.***
5. Move #17 earlier (10 days) (*see above*) ***We plan to publish the final documents on the Web no later on 10/3.***
6. #18 – be specific about including student “constituents” in preparation of report ***Yes, students are important constituents to be included in the preparation of the report.***
7. November too soon to reach all (internal & external) constituents “ridiculous” (numerous concerns)
8. Limited data available by November deadline
9. Is there flexibility on the 11/14 date since everyone will be submitting at the same time? ***Because of the feedback received from the campus we have reconsidered the timelines and have established that all reports will be due November 26, 2003.***
10. Extend 11/14 date to 12/14 for report (***see above***)
11. Issue: Dec. 23 – comments of design team and other administrators to website – not optimal time for eliciting comments from university community
12. How will feedback on 23<sup>rd</sup> look? ***We are currently finalizing the format for the Dean, VP and/or AVP comments. When that is finalized it will be published on the Web. We anticipate completion and submission of the format for administrative comment no later than 10/10.***
13. Feedback earlier than 3/ 4- 4/7
14. Suggestion- Present plans to different governance groups (e.g., SPEEC, PASC, faculty, SRC, Senate...) Prior to March 7<sup>th</sup>

15. March 7, 2004 – is that accurate? That day is a Sunday! **The correct date is March 5, 2004 (Friday)**
16. 21, 23 – timeline doesn't take into account larger and more complex units. Any room for extensions? ***We believe it is imperative to have a deadline to be fair to all units.***
17. # 23 Deans don't edit, but should summarize; hard copy of unit report to web, cc to Dean
18. #22 – assume that these don't need to be individual meetings? ***It is up to the administrator to determine how meetings will be structured.***
19. Eagerness to see President's comments
20. #23 – clarification needed Criteria will be posted by Dec 23<sup>rd</sup> (anticipated date)
21. What happens 5/7- Board have veto power? ***The Board has the authority to accept or reject the plan. The plan that is presented to the Board is a Final Draft.***
22. May 9, 2004 – change date to a weekday ***The correct date is May 10, 2004***
23. 25) Open meetings? ***The Design Teams work sessions held to discuss reports will not be open.*** Clarify. Open to observers and comments? Open just to university community? ***We will host Open Forum meetings and additional Leadership Summit meetings to provide additional opportunities for discourse with the campus community. (See 10/3 Activities/Timeline on Web and sent to all units.)***
24. 26), 27), 28) Timing matches board meetings
25. 28) Campus leaders – forum format? ***The Leadership Summit for March 5 will be similar to the 9/19 format; including reports and orientation and opportunity for small group discussions and input.***
26. When plan comes out in March, will we see what is actually happening so we can make plans? ***The plan in March remains as a Draft; it is not finalized until the Board of Trustees takes action. The Board will meet on May 7 to take action on the plan.***
27. Will this be realistic on 3/13? ***Yes, we will be able to present a “progress report” and first draft of the plan to the Board. The actual date of the Board meeting is 3/12/03.***
28. March 7 meeting will focus more on implementation of the plan. Public document will be out but units impacted by plan may be notified before March 7.
29. 3/7 question – are we told what to do then we decide how to do it? ***Not certain what this question is asking; however the March 5 Leadership Summit will be a presentation of the proposed plan, discussion for clarification and comment and suggestions, and suggestions on how to share with your units.***
30. Concern- May 10<sup>th</sup> after graduation, suggestion prior to graduation- move up a week. Timing needs to be looked at. ***We honor the role of the Board of Trustees in various stages. Board meetings are set and the May 7 date is firm. May 10 would be the first opportunity for the President to communicate the action taken by the Board The “All Campus” meeting scheduled for April 30 is before Graduation and will communicate to the campus the final draft to be considered by the Board at its 5/7/03 meeting.***
31. Is the May 10<sup>th</sup> communication going to be presentation, e-mail, etc.? Is this communication just a formality? ***No decision has been made as to how the Board action will be communicated. It may be a public presentation or it could be submitted electronically or both. Because the purpose of the communication is to announce the action of the Board, it might be considered a formality. Board actions are available to the public but are not always presented to the campus community in a formal manner; therefore the May 10 communication is not just a formality, but an effort to keep the campus informed and involved.***